

SWAN BOARD MEETING AGENDA

January 24, 2025 9:30 a.m.

**Blue Island Public Library
2433 York Street
Blue Island, IL 60406-2011**

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 January 24, 2025 SWAN Board Meeting Agenda (Exhibit pgs.1-2)

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE JANUARY 24, 2025 SWAN BOARD MEETING AGENDA AS PRESENTED

4. Action Item – Approval of SWAN Financials, December 2024 (Exhibit pgs. 3-11)
 - a. Balance sheet and detail of expenditures for December 2024
 - b. Approval of the payment of bills for December 1, 2024, through December 31, 2024 in the amount of \$85,200.48

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR DECEMBER 1 THROUGH DECEMBER 31, 2024 AND ACCEPTS THE BALANCE SHEET AND DETAIL OF EXPENDITURES FOR DECEMBER 2024

5. Action Item – Acceptance of the December 20, 2024, SWAN Board Meeting Minutes (Exhibit pgs. 12-14)

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE DECEMBER 20, 2024 SWAN BOARD MEETING MINUTES AS PRESENTED

6. Reports
 - a. Board President Report
 - b. Executive Director Report (Exhibit pgs. 15-18)
 - c. Operations Report (Exhibit pgs. 19-32)
 - d. Treasurer Report

- e. Board Calendar (Exhibit pgs. 33-34)
- 7. Discussion—FY26 budget & membership fees draft (Exhibit pgs. 35-64)
- 8. Discussion—Platform satisfaction survey 2025 & introductory email (Exhibit pgs. 65-68)
- 9. Discussion—SWAN training strategy (Exhibit pgs. 69-76)
- 10. Adjournment

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

SWAN Board Member	Library	Office	Term Expires
Dawn Bussey	Glen Ellyn Public Library		July 1, 2027
Zach Musil	Tinley Park Public Library	Vice President	July 1, 2027
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	Treasurer	July 1, 2026
Jennifer Cottrill	Midlothian Public Library	President	July 1, 2026

SWAN Library Services
Balance Sheet
As of December 31, 2024

	Balance End of Month
ASSETS	
Cash and Cash Equivalents	
Hinsdale Bank - Operating - 2176	590,877.63
Hinsdale Bank - MM - 5010	1,579,446.53
IMET Funds	361,928.02
Propay Funds	42.86
Total Cash and Cash Equivalents	\$ 2,532,295.04
 Current Assets	
Accounts Receivable	68,666.42
REINT Receivable	-
Other Receivables	-
Deposits	23,467.08
Total Current Assets	\$ 92,133.50
 Capital Assets, net	
Building and Improvements	6,895.00
Equipment	36,500.50
Computers	324,383.36
Accumulated Depreciation	(353,549.65)
Total Capital Assets, net	\$ 14,229.21
 Other Assets	
Intangible Right to Use Asset - Office Space	234,201.57
Accumulated Amortization - Right to Use Asset	(205,640.28)
Subscription Asset	1,933,499.27
Accumulated Amortization - Subscription Asset	(1,338,020.80)
Total Other Assets	\$ 624,039.76
Total Assets	\$ 3,262,697.51
 LIABILITIES	
Current Liabilities	
Library Consortia Special Interest Group Funds	6,249.46
Accrued Payroll	57,702.49
457B Payable	(2,014.58)
Retirement Payable	(1,042.00)
Compensated Absences	122,929.42
Total Current Liabilities	\$ 183,824.79
 Long Term Liabilities	
Lease Liability - Right to Use Asset	35,466.58
Subscription Liability	230,629.50
Accrued Interest Liability - SBITA	6,659.48
Total Long Term Liabilities	\$ 272,755.56
Total Liabilities	\$ 456,580.35
 FUND BALANCE	
Beginning Net Assets	
Unrestricted	2,893,173.82
Total Beginning Net Assets	\$ 2,893,173.82
 Current YTD Net Income	
	\$ (87,056.66)
Total Fund Balance	\$ 2,806,117.16
Total Liabilities and Fund Balances	\$ 3,262,697.51

Statement of Revenue and Expenses Summary
For the 6 Months Ended December 31, 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>
Revenue					
4000 - Membership Fees	\$1,713.00	\$1,435,729.98	\$2,875,427.00	\$ 1,439,697.02	49.93%
4100 - Membership Reimbursements	-	299,939.56	491,375.00	191,435.44	61.04%
4200 - Reimbursement for Losses	1,934.64	42,100.73	98,000.00	55,899.27	42.96%
4300 - Grant Revenue	-	250,307.84	500,616.00	250,308.16	50.00%
4400 - Registration & Event Receipts	-	7,560.00	5,000.00	(2,560.00)	151.20%
4500 - Investment & Interest	7,593.44	48,410.27	83,328.00	34,917.73	58.10%
Total Revenue	<u>11,241.08</u>	<u>2,084,048.38</u>	<u>4,053,746.00</u>	<u>1,969,697.62</u>	<u>51.41%</u>
Expenses					
5000 - Salaries & Wages	112,679.19	721,760.24	1,577,736.00	855,975.76	45.75%
5020 - Personnel Benefits	55,138.27	210,652.45	445,419.00	234,766.55	47.29%
5100 - Building & Grounds	9,799.12	66,063.57	97,410.00	31,346.43	67.82%
5200 - Professional Development	1,647.07	10,831.27	14,700.00	3,868.73	73.68%
5300 - Membership Development	-	4,495.60	10,750.00	6,254.40	41.82%
5400 - Information & Technology Services	1,427.95	731,058.53	1,206,700.00	475,641.47	60.58%
5500 - General Office	164.64	2,415.49	12,700.00	10,284.51	19.02%
5600 - Hardware & Equipment	-	1,673.14	2,000.00	326.86	83.66%
5700 - Insurance	8,384.00	12,866.00	11,400.00	(1,466.00)	112.86%
5800 - Contractual Services	17,941.86	67,528.91	125,760.00	58,231.09	53.70%
5900 - Library Materials & Content	3,042.33	339,407.08	584,375.00	244,967.92	58.08%
6000 - Interest & Fees	519.77	2,352.76	2,474.00	121.24	95.10%
Total Expenses	<u>210,744.20</u>	<u>2,171,105.04</u>	<u>4,093,745.90</u>	<u>1,922,640.86</u>	<u>53.03%</u>
Excess Revenues less Expenses	<u>\$ (199,503.12)</u>	<u>\$ (87,056.66)</u>	<u>\$ (39,999.90)</u>	<u>\$ 47,056.76</u>	

Statement of Revenue and Expenses
For the 6 Months Ended December 31, 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>
Revenue					
4010 - SWAN Full Membership Fees	\$ 1,713.00	\$ 1,435,729.98	\$ 2,871,727.00	\$ 1,435,997.02	50.00%
4011 - SWAN Internet Access Membership Fees	0.00	0.00	3,700.00	3,700.00	0.00%
4190 - Member Group Purchase Receipts	0.00	299,939.56	491,375.00	191,435.44	61.04%
4220 - Reimbursement Losses for Resource Sharing	0.00	22,370.27	50,000.00	27,629.73	44.74%
4240 - E-Commerce Transactions	1,934.64	19,730.46	43,000.00	23,269.54	45.88%
4250 - Deaccession Transactions	0.00	0.00	5,000.00	5,000.00	0.00%
4310 - RAILS Support to SWAN	0.00	250,307.84	500,616.00	250,308.16	50.00%
4499 - Annual Conference Receipts	0.00	7,560.00	5,000.00	(2,560.00)	151.20%
4510 - Interest Income	7,593.44	48,410.27	83,328.00	34,917.73	58.10%
Total Revenue	<u>11,241.08</u>	<u>2,084,048.38</u>	<u>4,053,746.00</u>	<u>1,969,697.62</u>	<u>51.41%</u>
Expenses					
5000 - Salaries & Wages	112,679.19	721,760.24	1,577,736.00	855,975.76	45.75%
5021 - FICA Expense	8,337.32	53,523.06	120,700.00	67,176.94	44.34%
5023 - Worker's Compensation	0.00	0.00	4,719.00	4,719.00	0.00%
5024 - Retirement Benefits	15,957.66	73,759.60	143,700.00	69,940.40	51.33%
5025 - Health, Dental, Life And Disability Insurance	30,843.29	83,161.82	174,800.00	91,638.18	47.58%
5026 - Tuition Reimbursements	0.00	0.00	1,100.00	1,100.00	0.00%
5085 - Staff Wellness	0.00	207.97	400.00	192.03	51.99%
5110 - Rent/Lease	8,352.42	59,291.17	88,000.00	28,708.83	67.38%
5120 - Utilities	496.45	4,028.45	4,300.00	271.55	93.68%
5130 - Property Insurance	0.00	642.00	650.00	8.00	98.77%
5140 - Repairs & Maintenance	0.00	371.70	960.00	588.30	38.72%
5150 - Custodial Service & Supplies	950.25	1,730.25	3,500.00	1,769.75	49.44%
5210 - Conference Travel	607.04	3,607.94	6,000.00	2,392.06	60.13%
5220 - Staff Meetings	170.03	457.33	900.00	442.67	50.81%
5230 - Staff Professional Development	720.00	4,843.00	4,000.00	(843.00)	121.08%
5240 - Professional Association Membership Dues	150.00	333.00	2,500.00	2,167.00	13.32%
5250 - Educational Material	0.00	0.00	800.00	800.00	0.00%
5260 - Online Learning	0.00	1,590.00	500.00	(1,090.00)	318.00%
5310 - Travel Reimbursement	0.00	476.10	800.00	323.90	59.51%
5330 - Library Professional Development	0.00	4,019.50	7,450.00	3,430.50	53.95%
5399 - Annual Conference	0.00	0.00	2,500.00	2,500.00	0.00%
5420 - Application Software Licensing	999.95	5,970.11	16,800.00	10,829.89	35.54%
5430 - Server Software Licensing	428.00	77,396.68	121,800.00	44,403.32	63.54%
5440 - Library Services Platform	0.00	511,767.24	921,000.00	409,232.76	55.57%
5450 - Data Management Services	0.00	18,404.46	33,000.00	14,595.54	55.77%
5460 - Information Subscription Service	0.00	78,826.32	75,700.00	(3,126.32)	104.13%
5470 - Subscription Support Services	0.00	32,842.00	23,200.00	(9,642.00)	141.56%
5480 - Telecommunications	0.00	5,851.72	14,500.00	8,648.28	40.36%
5490 - Group Purchases - Services	0.00	0.00	700.00	700.00	0.00%
5510 - Office Supplies	164.64	721.56	2,200.00	1,478.44	32.80%
5520 - Postage	0.00	358.97	500.00	141.03	71.79%
5550 - Furniture	0.00	0.00	10,000.00	10,000.00	0.00%
5599 - Annual Conference Supplies	0.00	1,334.96	0.00	(1,334.96)	0.00%
5620 - Hardware	0.00	1,673.14	2,000.00	326.86	83.66%
5700 - Insurance	8,384.00	12,866.00	11,400.00	(1,466.00)	112.86%
5810 - Legal	0.00	0.00	1,500.00	1,500.00	0.00%
5820 - Accounting	10,170.00	13,425.00	19,160.00	5,735.00	70.07%
5830 - Consulting	275.00	4,175.00	5,000.00	825.00	83.50%
5840 - Payroll Service Fees	329.36	2,075.59	4,500.00	2,424.41	46.12%
5860 - Notification & Collection	7,167.50	35,784.32	86,700.00	50,915.68	41.27%
SWAN Board meeting					

Statement of Revenue and Expenses
For the 6 Months Ended December 31, 2024

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
5899 - Annual Conference Facility Contract	0.00	12,069.00	8,900.00	(3,169.00)	135.61%
5920 - Reimburse for Resource Sharing	3,042.33	25,188.72	50,000.00	24,811.28	50.38%
5940 - E-Commerce Payment Transactions	0.00	18,112.90	43,000.00	24,887.10	42.12%
5990 - Group Purchases - Content	0.00	296,105.46	491,375.00	195,269.54	60.26%
6010 - Bank Fees	519.77	2,352.76	2,424.00	71.24	97.06%
6020 - Merchant Account Fees	0.00	0.00	50.00	50.00	0.00%
6110 - Depreciation	0.00	0.00	2,321.90	2,321.90	0.00%
Total Expenses	<u>210,744.20</u>	<u>2,171,105.04</u>	<u>4,093,745.90</u>	<u>1,922,640.86</u>	<u>53.03%</u>
 Excess Revenues less Expenses	 <u>\$ (199,503.12)</u>	 <u>\$ (87,056.66)</u>	 <u>\$ (39,999.90)</u>	 <u>\$ 47,056.76</u>	

SWAN Library Services

Check Register

All Bank Accounts

December 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Vendor Checks						
Batavia Public Library				11077	12/16/24	<u>51.67</u>
5920	Reimburse for Resource Sharing	Batavia Public Library	51.67			
Berwyn Public Library				11078	12/16/24	<u>99.38</u>
5920	Reimburse for Resource Sharing	Berwyn Public Library	99.38			
Bloomington Public Library				11079	12/16/24	<u>14.41</u>
5920	Reimburse for Resource Sharing	Bloomington Public Library	14.41			
Carol Stream Public Library				11080	12/16/24	<u>81.69</u>
5920	Reimburse for Resource Sharing	Carol Stream Public Library	81.69			
Chicago Heights Public Library				11081	12/16/24	<u>35.46</u>
5920	Reimburse for Resource Sharing	Chicago Heights Public Library	35.46			
Cicero Public Library				11082	12/16/24	<u>25.47</u>
5920	Reimburse for Resource Sharing	Cicero Public Library	25.47			
Clarendon Hills Public Library				11083	12/16/24	<u>38.44</u>
5920	Reimburse for Resource Sharing	Clarendon Hills Public Library	38.44			
Crete Public Library District				11084	12/16/24	<u>13.31</u>
5920	Reimburse for Resource Sharing	Crete Public Library District	13.31			
Elmwood Park Public Library				11085	12/16/24	<u>14.16</u>
5920	Reimburse for Resource Sharing	Elmwood Park Public Library	14.16			
Flossmoor Public Library				11086	12/16/24	<u>110.37</u>
5920	Reimburse for Resource Sharing	Flossmoor Public Library	110.37			
Forest Park Public Library				11087	12/16/24	<u>49.31</u>
5920	Reimburse for Resource Sharing	Forest Park Public Library	49.31			
Franklin Park Public Library District				11088	12/16/24	<u>18.73</u>
5920	Reimburse for Resource Sharing	Franklin Park Public Library District	18.73			

SWAN Library Services

Check Register

All Bank Accounts

December 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Geneva Public Library District 5920	Reimburse for Resource Sharing	Geneva Public Library District	268.37	11089	12/16/24	<u>268.37</u>
Glen Ellyn Public Library 5920	Reimburse for Resource Sharing	Glen Ellyn Public Library	175.09	11090	12/16/24	<u>175.09</u>
Glenside Public Library 5920	Reimburse for Resource Sharing	Glenside Public Library	27.56	11091	12/16/24	<u>27.56</u>
Green Hills Public Library District 5920	Reimburse for Resource Sharing	Green Hills Public Library District	115.94	11092	12/16/24	<u>115.94</u>
Hinsdale Public Library 5920	Reimburse for Resource Sharing	Hinsdale Public Library	71.47	11093	12/16/24	<u>71.47</u>
Hodgkins Public Library District 5920	Reimburse for Resource Sharing	Hodgkins Public Library District	7.62	11094	12/16/24	<u>7.62</u>
Lansing Public Library 5920	Reimburse for Resource Sharing	Lansing Public Library	30.70	11095	12/16/24	<u>30.70</u>
Linda Sokol Francis Brookfield Library 5920	Reimburse for Resource Sharing	Linda Sokol Francis Brookfield Library	36.89	11096	12/16/24	<u>36.89</u>
Lyons Public Library 5920	Reimburse for Resource Sharing	Lyons Public Library	31.80	11097	12/16/24	<u>31.80</u>
Maywood Public Library District 5920	Reimburse for Resource Sharing	Maywood Public Library District	11.31	11098	12/16/24	<u>11.31</u>
Oak Brook Public Library 5920	Reimburse for Resource Sharing	Oak Brook Public Library	32.84	11099	12/17/24	<u>32.84</u>
Oak Park Public Library 5920	Reimburse for Resource Sharing	Oak Park Public Library	846.31	11100	12/17/24	<u>846.31</u>

SWAN Library Services

Check Register

All Bank Accounts

December 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Park Forest Public Library 5920	Reimburse for Resource Sharing	Park Forest Public Library	35.11	11101	12/17/24	<u>35.11</u>
River Forest Public Library 5920	Reimburse for Resource Sharing	River Forest Public Library	21.66	11102	12/17/24	<u>21.66</u>
St. Charles Public Library District 5920	Reimburse for Resource Sharing	St. Charles Public Library District	137.61	11103	12/17/24	<u>137.61</u>
Sugar Grove Public Library District 5920	Reimburse for Resource Sharing	Sugar Grove Public Library District	174.89	11104	12/17/24	<u>174.89</u>
Town & Country Public Library District 5920	Reimburse for Resource Sharing	Town & Country Public Library District	59.00	11105	12/17/24	<u>59.00</u>
University Park Public Library District 5920	Reimburse for Resource Sharing	University Park Public Library District	17.22	11106	12/17/24	<u>17.22</u>
Villa Park Public Library 5920	Reimburse for Resource Sharing	Villa Park Public Library	70.70	11107	12/17/24	<u>70.70</u>
Westmont Public Library 5920	Reimburse for Resource Sharing	Westmont Public Library	260.81	11108	12/17/24	<u>260.81</u>
Woodridge Public Library 5920	Reimburse for Resource Sharing	Woodridge Public Library	57.03	11109	12/17/24	<u>57.03</u>
COSUGI 5240	Professional Association Membership Dues	COSUGI	150.00	11110	12/18/24	<u>150.00</u>
Employee Benefits Corporation 5830	Consulting	Employee Benefits Corporation - annual non-discrimination census processing	275.00	11111	12/18/24	<u>275.00</u>
Lucas McKeever				11112	12/18/24	<u>887.04</u>

SWAN Library Services

Check Register

All Bank Accounts

December 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5210	Conference Travel	Lucas McKeever -ILA hotel charges	485.30			
5210	Conference Travel	Lucas McKeever - ILA meals	121.74			
5230	Staff Professional Development	Lucas McKeever - conference fee	280.00			
Nicor Gas				11113	12/18/24	<u>205.00</u>
5120	Utilities	Nicor Gas - 11/13/24-12/02/24 FINAL for QR	205.00			
Reliance Standard Life Insurance Co.				11114	12/18/24	<u>937.57</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co. - January	937.57			
Unique Integrated Communications, Inc.				11115	12/18/24	<u>7,167.50</u>
5860	Notification & Collection	Unique Integrated Communications, Inc. - Curbside Communicator	40.00			
5860	Notification & Collection	Unique Integrated Communications, Inc. - MessageBee	6,690.50			
5860	Notification & Collection	Unique Integrated Communications, Inc.- Notices	437.00			
Wellness Insurance Network-WIN				11116	12/18/24	<u>158.18</u>
5025	Health, Dental, Life And Disability Insurance	Wellness Insurance Network-WIN - December	158.18			
KMMRD Enterprises				51236	12/31/24	<u>8,352.42</u>
5110	Rent/Lease	KMMRD Enterprises	8,352.42			
T.A. Systems Inc.				51237	12/02/24	<u>260.00</u>
5150	Custodial Service & Supplies	T.A. Systems Inc.	260.00			
ComEd				51238	12/17/24	<u>114.78</u>
5120	Utilities	Com Ed - final usage at QR	114.78			
T.A. Systems Inc.				51239	12/19/24	<u>195.00</u>
5150	Custodial Service & Supplies	T.A. Systems Inc. - November	195.00			
LIMRiCC				51240	12/19/24	<u>16,837.35</u>
5025	Health, Dental, Life And Disability Insurance	LIMRiCC - December	16,837.35			

SWAN Library Services

Check Register

All Bank Accounts

December 2024

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
ComEd 5120	Utilities	ComEd - deposit for 915 Harger	176.67	51241	12/20/24	<u>176.67</u>
The Hartford, Inc. 5700	Insurance	The Hartford, Inc. w/c 10/1/24 - 10/1/25	2,193.00	51242	12/20/24	<u>2,193.00</u>
Travelers 5700	Insurance	Travelers - 10/31/24-10/31/25	6,191.00	51243	12/02/24	<u>6,191.00</u>
LIMRiCC 5025	Health, Dental, Life And Disability Insurance	LIMRiCC	16,837.35	51244	12/02/24	<u>16,837.35</u>
Lauterbach & Amen, LLP 5820	Accounting	Lauterbach & Amen, LLP - audit	8,000.00	51245	12/02/24	<u>9,085.00</u>
5820	Accounting	Lauterbach & Amen, LLP - november services	1,085.00			
KMMRD Enterprises 5110	Rent/Lease	KMMRD Enterprises	8,352.42	51246	12/02/24	<u>8,352.42</u>
First Bankcard 5220	Staff Meetings	First Bankcard - staff lunch	170.03	51247	12/17/24	<u>2,697.87</u>
5150	Custodial Service & Supplies	First Bankcard - Shark Shredding	495.25			
5430	Server Software Licensing	First Bankcard - VEEAM	428.00			
5510	Office Supplies	First Bankcard - Target	67.50			
5510	Office Supplies	First Bankcard - Home Depot	97.14			
5230	Staff Professional Development	First Bankcard - Trailiant training	440.00			
5420	Application Software Licensing	First Bankcard - Formsite	999.95			
Lauterbach & Amen, LLP 5820	Accounting	Lauterbach & Amen, LLP - December	1,085.00	51248	12/19/24	<u>1,085.00</u>
Check List Total						<u><u>85,200.48</u></u>

SWAN BOARD MEETING MINUTES

December 20, 2024, 9:30 a.m.

Blue Island Public Library

2433 York Street

Blue Island, IL 60406

1. Call to Order, Roll Call

President Cottrill called the meeting to order at 9:30 a.m. The following Board members were present to establish a quorum.

- a. Dawn Bussey
- b. Jennifer Cottrill
- c. Samantha Johnson
- d. Zach Musil
- e. Colleen Waltman
- f. 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 December 20, 2024, SWAN Board Meeting Agenda

Waltman moved, seconded by Bussey that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE DECEMBER 20, 2024, SWAN BOARD MEETING AGENDA AS PRESENTED

Motion carried by unanimous voice vote.

4. Action Item

Approval of the SWAN Financials, November 2024

Waltman moved, seconded by Waltman that it be

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR NOVEMBER 1, 2024, THROUGH NOVEMBER 30, 2024, AND ACCEPTS THE BALANCE SHEET AND DETAILS OF EXPENDITURES FOR NOVEMBER 2024

Motion carried by roll call vote with the following results:

Ayes: Bussey, Cottrill, Johnson, Musil, Wassenaar, Waltman

5. Action Item

Acceptance of the November 22, 2024, SWAN Board Meeting Minutes

Waltman moved, seconded by Musil that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE NOVEMBR 22, 2024, SWAN BOARD MEETING MINUTES

Motion carried by unanimous voice vote.

6. Action Item

Acceptance of the November 22, SWAN Environmental Scan Task Force Meeting Minutes

Musil moved, seconded by Johnson that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE NOVEMBER 22, 2024, SWAN ENVIRONMENTAL SCAN TASK FORCE MEETING MINUTES

Motion carried by unanimous voice vote.

7. Reports

a. Board President Report

None

b. Executive Director Report

Skog gave updates on the SWAN included in the packet.

Operations Report

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

Treasurers Report

None

c. Board Calendar

The Board calendar was reviewed.

8. Discussion Novelist Select Consortia Recommendation

The current subscription of Novelist Select and background was presented in the board meeting packet. The SWAN Board agreed to start the process of sunseting the subscription with announcements in the upcoming Fireside and SWAN e-newsletters.

9. Discussion SWAN FY26 budget & membership fees draft agenda

The FY26 budget was reviewed and discussed. A recommendation to explain how the formula works for when calculating the SWAN Fees.

Cottrill adjourned the meeting at 10:20 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

Jesse Blazek
Board Secretary

SWAN Executive Director Report

January 24, 2025

Update on Activities

SirsiDynix contract renewal

I held a meeting with our SirsiDynix sales representative Stacy Betts to discuss the steps to renew our agreement.

- Typical 1-year renewals set the escalation of the maintenance at 6.9% per year.
- SWAN would need to notify SirsiDynix the intention to negotiate a new agreement 60 days prior to May 1, 2025 otherwise the agreement will renew 1 year.
- Inclusion of BLUEcloud Staff requirements in the agreement would be unusual, but if detailed and explained properly, could be included in negotiations.

The Environmental Scan Task Force should conclude its work and provide a written recommendation to the SWAN Board at its next meeting in February.

Aspen Discovery hosting contract

The number of companies that can provide hosting and support of Aspen has increased over the past three years of our current agreement with ByWater Solutions. I have obtained hosting quotations from Grove for Libraries and Equinox for 1 year of hosting of the SWAN Aspen server, test Aspen, and LiDA mobile app. Over the next month I will obtain a renewal quote from ByWater Solutions and present a recommendation to the SWAN Board at the February 21, 2025 meeting.

Aspen Discovery governance task force

As part of my goals for the year, I shared that I would be involved with creating a governance structure for the Aspen Discovery project. I offered to the Aspen community to lead a task force with seven representatives from the community serving as voting members of the task force. The group has met three times to date and will be meeting bi-weekly through the next three months.

The task force last meeting included information and discussion on the option to form the legal entity under the Open Library Foundation (OLF). The Foundation is relatively new to the library community, and will provide legal, banking, and liability assistance. OLF currently supports library software projects FOLIO and VuFind, along with [other library open-source communities](#).

Office security deposit

The new office requires a security deposit of two months’ rent totaling \$8,352.42 which is reflected in the December financial statements. The \$23,467.08 security deposit for the prior lease was received and will be reflected in the January 2025 financial statements.

Transfer to Money Market

Per board input at the December meeting, Business Manager Ginny Blake initiated the transfer of \$350,000 from the SWAN checking account to the Money Market account. This will be reflected in the January 2025 financial statements.

Board Considerations

FY26 budget draft

I have completed the budget narrative for this budget, which you have not received or reviewed up to this point. The narrative, budget, and membership fees in your meeting packet will be presented at the Committee of the Whole meeting on Tuesday, February 4th.

Training strategy

The Assistant Director, User Experience Manager, Training & Development Consultant have completed work on a comprehensive training strategy for SWAN. It outlines a mission and goals for our training offerings as well as a framework to follow to evaluate training needs and execute them in the form of documentation, on-site trainings, live webinars, or online learning opportunities depending on need. Finally, it sets a standard for review and maintenance of SWAN’s trainings and documentation. We have presented this to SWAN staff and will now begin an implementation plan and process documentation for staff to follow in detail. Crystal Vela will be primarily responsible for implementing this framework, which we hope will result in more efficient, easy-to-access, and needs-based training for member staff.

Membership Satisfaction with SWAN Platform

I have included a draft of the introduction and survey design for the SWAN Board to discuss at the January 24, 2025, meeting.

Monthly Financial Report

December Balance Sheet

The Fund Balance Unrestricted line for December is \$2,893,173.82 which is unchanged from the previous month. The table below shows the current FY25 budget expense and budgeted spending from reserves.

Fund Balance Unrestricted	\$2,893,173.82
Expenses to be paid from reserve	(\$40,000.00)
	\$2,853,173.82

SWAN annual expense budget	\$4,093,745.90
	70%
Number of months operating expense in reserve	8.4

Revenue & Expense Report

This month will be 50% of the budgeted revenue and expenses. SWAN’s financials are presented on a cash basis for this current fiscal year 2025. The total revenue is reflected in the library membership fees invoiced for two quarters, plus invoices sent for the full year of the EBSCO group purchase which has our revenue at 51%.

	FY25 Budget	Ending December 2024	Percentage of budget YTD 50%
Total Revenue	\$4,053,746.00	\$2,084,048.38	51%
Total Expenses	\$4,093,745.90	\$2,171,105.04	53%
Over / (Under)	(\$39,999.90)	(\$87,056.66)	

Accounts Receivable

4010 - SWAN Full Membership Fees: 2nd quarter invoices were sent out in October 2024, reflecting 50.00% of this revenue budget line. The 3rd quarter invoices were sent out in January, which will reflect 75% of the revenue for this budget line.

4011 – Internet Access Membership Fees: the six school libraries were invoiced in January.

4190 – Member Group Purchase Receipts: 61.04%

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: 50%

The 2nd quarter payment was made to SWAN totaling \$125,153.92 in October.

4510 – Interest Income: 58.10%

SWAN’s Money Market rate for December is 4.80% which has been dropping slowly after a high of 5.59% rate in June. Interest income from the IMET Convenience Fund is now recorded in this line.

Accounts Payable

5110 – Rent/Lease: 67.38%

This expense line will be over budget through December and then after the SWAN office move in December we will have the negotiated 9 months' rent abatement through the rest of the fiscal year. Expenses in December include the shredding of financial banking documents after receiving approval from the Illinois State Archives.

5260 – Online Learning: 318.00%

Staff training for SWAN's online learning platform; arranged after the departure of the Bibliographic Services Consultant.

5460 – Information Subscription Service: 104.13%

EBSCO Novelist Select and ProQuest Syndetic Solutions subscription paid for the full year.

5470 – Subscription Support Services: 141.56%

The new SWAN ticketing system HaloITSM expense subscription paid for the full year.

5899—Annual Conference Facility Contract: 135.61%

The expanded August 2024 SWAN Expo included additional rooms which resulted in a higher than budgeted expense for the Morain Valley Community College Business and Conference Center space.

5990 – Group Purchases – Content: 60.26%

July recorded the full EBSCO group-purchase expense (RAILS EBSCO "flagship package") for FY25 with the offsetting revenue recorded in the #4190 Group Purchase Receipts.

Operations Report: December 2024

Summary

Membership engagement activities and statistics are reported through the month-end of December 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 December 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
12/5/2024	SWAN Quarterly Meeting	All	Governance
12/10/2024	Acquisitions Office Hours	Bibliographic Services; Information Technology & System Support	Consultation
12/12/2024	Serials Office Hours	Bibliographic Services	Consultation
12/16/24	Aspen Governance Task Force	Administration	Leadership
12/19/2024	ILL/Circ/Quarterly Billing Office Hours	Information Technology & System Support; Administration	Consultation
12/20/2024	SWAN Board Meeting	Administration	Governance

User Group and Advisory Meeting Recap

Acquisitions Office Hours (12/10/2024)

Samantha also hosted an Acquisitions Office Hours on December 10th that centered around fiscal year close and the rollover process. There were 2 attendees that asked a good number of questions.

Serials Office Hours (12/12/2024)

On Thursday, December 12th at 9:30am we held Serials Office Hours. Each year, there is a process many libraries go through to be prepared for receiving magazines in the new year. Since this task is only performed once a year, this meeting is meant to be a space for folks to come with any questions they may have as they begin the process. We had attendees from three member libraries and discussion included Serial Control management, frequency and types of publication patterns, Call Number setup and formatting, and removing XX as part of the call number.

Major Projects & Research

Aspen Discovery

Aspen release 24.12 included a new “Year in Review” feature; new formats for Tonies and Yoto; and the ability to add titles to Checkout History. The Year In Review prompt will appear until February 1, 2025 for those libraries that have opted in.

EBSCO eBooks in Aspen

The statewide EBSCO database package includes several eBook collections. These were discoverable by direct links through EBSCO databases, but they are now sideloaded into Aspen where they are discoverable with other eBooks within grouped records. Thank you to Olivia Montolin for investigating and working with EBSCO to deliver these titles in a user-friendly way for patrons.

Hoopla and Creativebug in Aspen

Creativebug is now included in Hoopla as a BingePass. If libraries have both Hoopla and Creativebug, they will still be charged for the Creativebug BingePass. Olivia Montolin took the step of loading Creativebug records for all subscribing libraries and suppressing the Creativebug BingePass through Hoopla in the Aspen catalog; this can help mitigate instances where libraries could be “double charged”.

Holds through purchase suggestions

The Aspen purchase suggestions system now includes the ability to place holds for patrons once a suggested title is purchased. Oak Brook, St. Charles, and Warrenville are currently testing this feature.

Scan-and-go pilot

The pilot has resumed for the scan-and-go self check feature in the Aspen LiDA. The scan-and-go feature now uses the correct checkout library for transactions. Downers Grove, Indian Prairie, and Lansing are currently testing and will evaluate if they are ready to enable the scan-and-go feature for patrons.

IT Infrastructure

Prior to the holidays in December, ITSS began to stand up the infrastructure at the new office. The Comcast connection was set up, wireless, printing, and other office essentials are up and running. Some further configuration of security systems, including cameras and our existing keypad system are being scheduled for early January.

Cyber Assessment and Disaster Recovery Plan

Information Technology & System Support has been working on a comprehensive evaluation of our cybersecurity based on the CIS Critical Security Controls v8 framework. Now that our Network Security Administrator, Lexii Klopp, has started work, we have oriented her with the initial analysis Ian Nosek started, and we have transferred responsibility to her. Over the coming months, we plan to create a plan of action to shore up weak points in our security framework and best practices. Lexii will

work with the team to create a plan of action over the short and long term to better our score against this framework. We have taken a snapshot of the current assessment for future comparison.

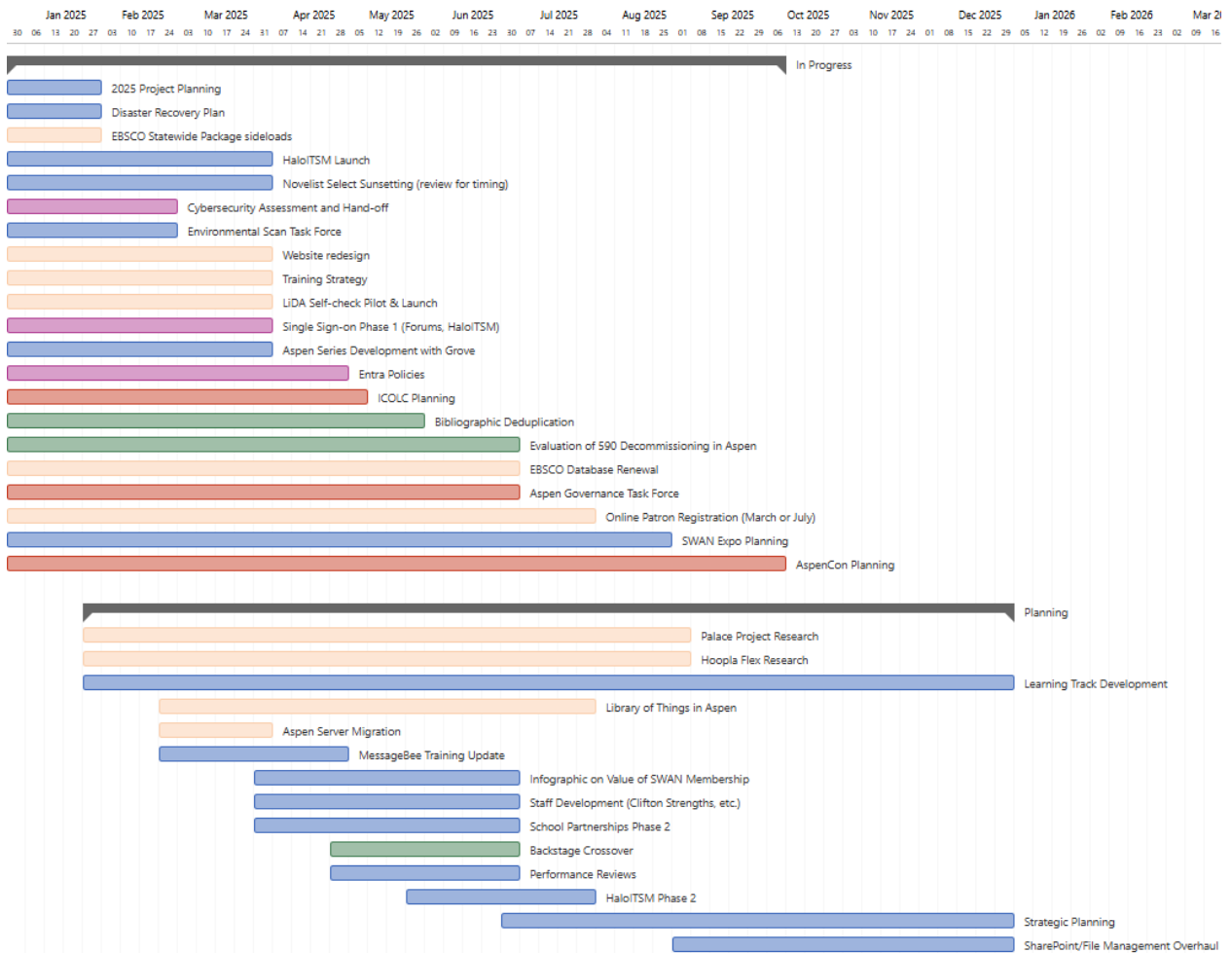
Meanwhile, we are also working on a Disaster Recovery Plan to have on file in the event of an unplanned event that affects SWAN's networking and services. It outlines a Disaster Recovery Team, best practices, and steps to take should a disaster occur, such as a fire, flood, or ransomware attack. This will be a work-in-progress document for the foreseeable future as we continue to research response plans, but we will present an initial draft to the board at an upcoming meeting.

Ticketing System – HaloITSM

We have wrapped up the configuration step in our new ticketing system launch and are currently training SWAN staff on the interface, which will include an opportunity for feedback and refinement of the system we have in place. We are still on track to train member staff on the end-user interface in late February with a crossover date in early March. We will announce exact dates in the coming days.

2025 Projects

The SWAN management team has been working on an outline of projects for 2025. The plan is a work in progress and subject to change. Once complete, we will provide a detailed overview for the board and membership.



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
Monthly	ByWater - Aspen check-in	All (UX Lead)	Partnerships
Bi-Weekly	HaloITSM Ticketing Configuration	All (Admin Lead)	Partnerships
12/5/2024	Aspen Gathering	All	Partnerships
12/18/2024	SirsiDynix SureSailing	All	Partnerships

Support, Documentation, and Training

Details on support tickets, documentation, and training.

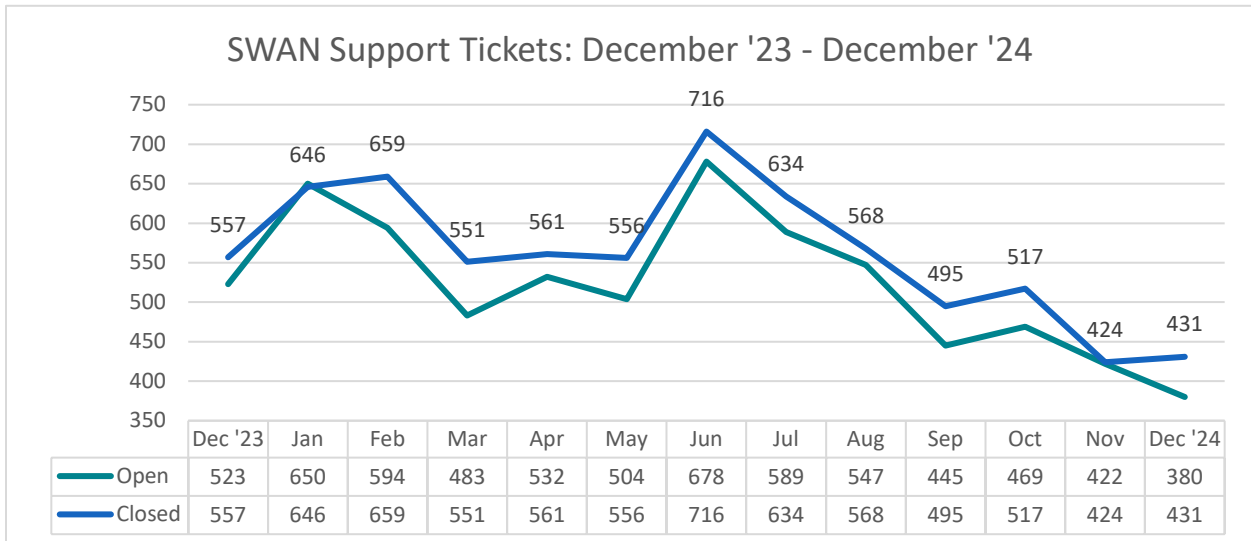
System Maintenance & Outage Calendar

Aspen Test Release		Aspen	Fri 11/8/2024	Sat 11/9/2024
Aspen Catalog/LIDA Down	An apparent issue with Apache on the new server caused the entire system to beco...	Outage, Aspen	Wed 11/13/2024	Thu 11/14/2024
Aspen Production Release		Aspen	Wed 11/20/2024	Thu 11/21/2024
Aspen Test Release			Fri 12/6/2024	Sat 12/7/2024
Aspen Production Release			Wed 12/18/2024	Thu 12/19/2024
SWAN App Non-Responsive	The LIDA app became unresponsive on Saturday morning. ByWater was notified an...	Outage, Aspen	Sat 1/11/2025	Sat 1/11/2025

Support Tickets

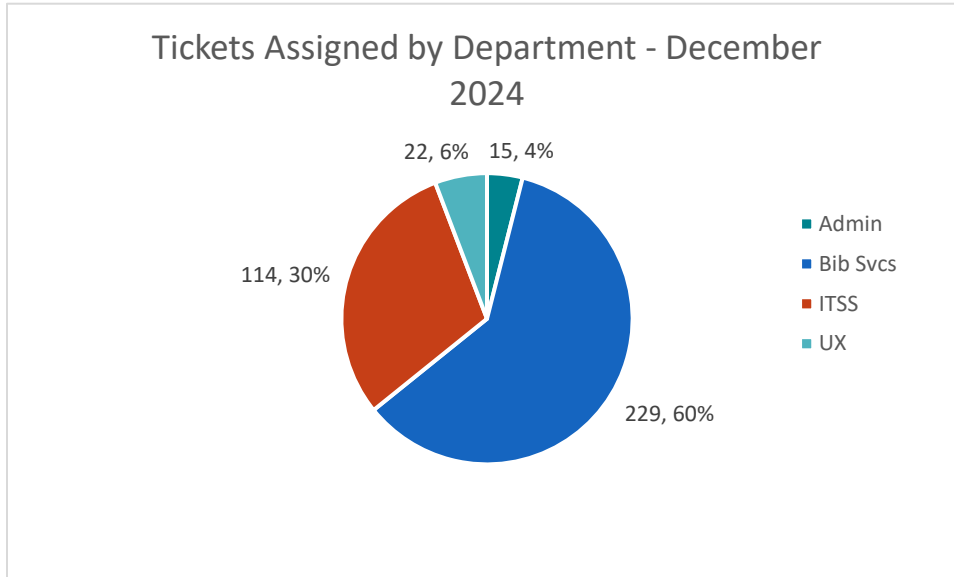
SWAN support staff continue to maintain an excellent monthly open/closed ticket ratio. Overall ticket volume has continued to decrease steadily since this summer and reached an annual low in December.

SWAN Support Tickets Opened/Closed in Past 12 Months



Data labels reflect tickets closed each month.

SWAN Support Tickets Assigned by Department



Support Site

Initial development of our new support site is underway, and our first round of wireframes have been completed. We plan to conduct usability testing of the new home page in February.

Training Modules & Recordings

Learning Management System (SWAN Online Learning)

We added 14 new users in December to the SWAN online learning management system.

The annual review of courses in the LMS is complete; 14 courses were reviewed and updated. Thank you to Crystal Vela for coordinating the review and updates with SWAN staff.

On-site Training and Consultation

Samantha Dietel had three consultations in the month of December. She met with Tinley Park PL staff to discuss Generic Users and how their statuses impact the public catalog. She held an Acquisitions consultation with new staff at Palos Heights PL to discuss fiscal year rollover. She also met with Sugar Grove PL, along with other SWAN staff, to discuss going fine free.

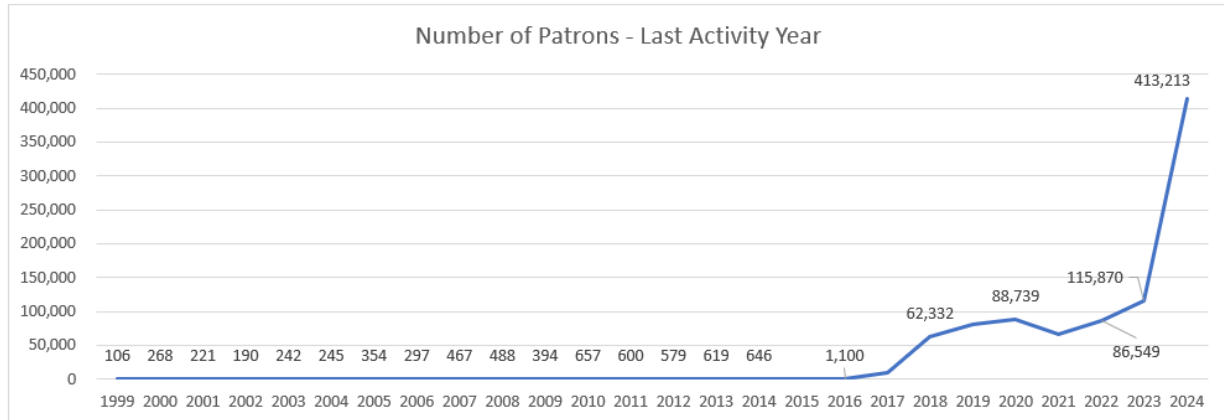
Maintenance

Automatic Monthly Patron Record Removal

In December, we purged 4,634 inactive patrons from the database. In total, we removed 96,126 inactive patrons in calendar year 2024 who had been inactive for 7 years or more.

We are currently planning to take the last step in the patron record removal transition that has been in place since 2020. As of January, we remove patrons after 7 years of inactivity. In February, libraries will begin to see removal reports for patrons inactive for 5 years. The first removal with the decreased inactivity window will take place in March 2025.

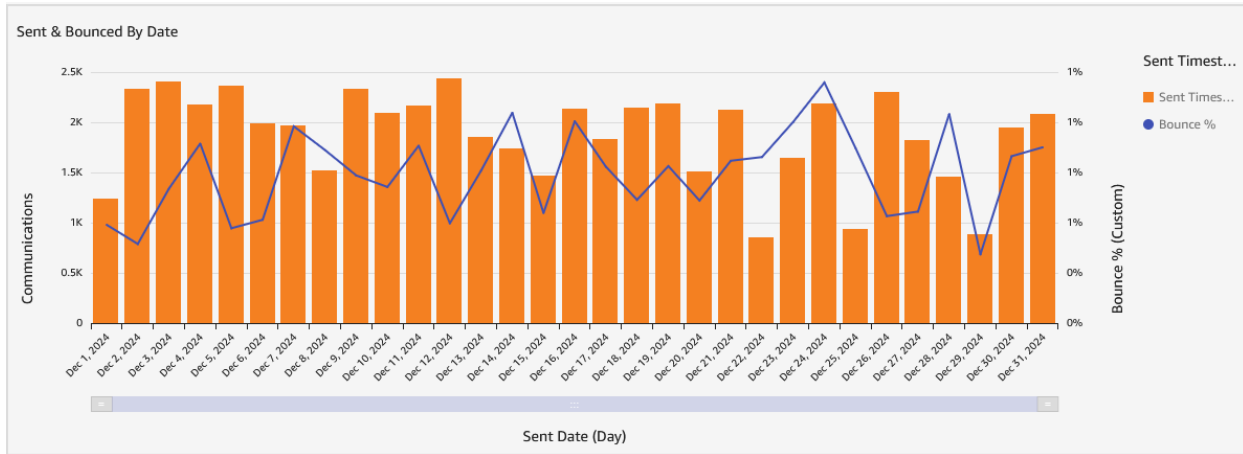
SWAN recommends purging all patron records with last activity date prior to 1/1/2015 regardless of outstanding bills.



MessageBee Statistics

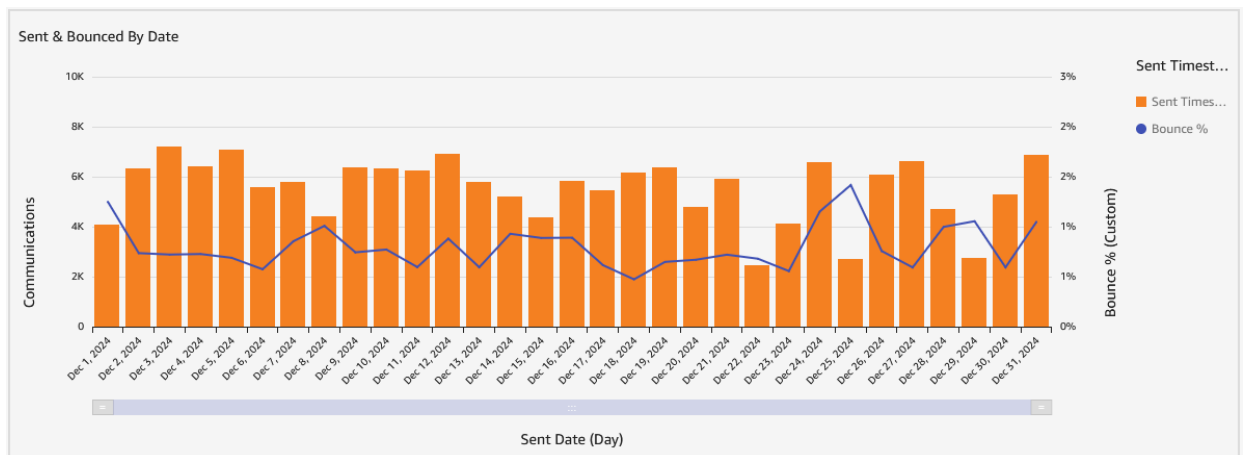
SMS notifications

Month, Yr	SMS Sent	Success Count	Success Rate	Failed Count	Failure Rate
January, 2024	61,426	60,771	98.93%	655	1.07%
February, 2024	55,111	54,538	98.96%	573	1.04%
March, 2024	56,938	56,287	98.86%	651	1.14%
April, 2024	57,823	57,196	98.92%	627	1.08%
May, 2024	58,436	57,840	98.98%	596	1.02%
June, 2024	60,479	59,835	98.94%	644	1.06%
July, 2024	64,639	63,356	98.02%	1,283	1.98%
August, 2024	63,348	61,743	97.47%	1,605	2.53%
September, 2024	62,149	61,470	98.91%	679	1.09%
October, 2024	63,337	62,349	98.44%	988	1.56%
November, 2024	59,852	59,411	99.26%	441	0.74%
December, 2024	57,982	57,555	99.26%	427	0.74%



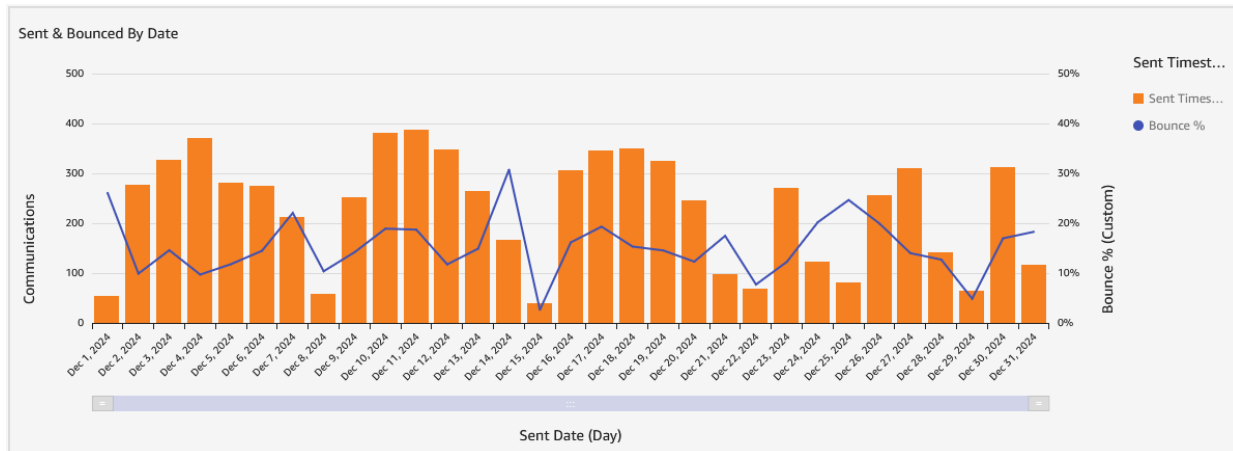
Email notifications

Month, Yr	Email Sent	Success Count	Success Rate	Failed Count	Failure Rate
January, 2024	188,299	187,100	99.36%	1,199	0.64%
February, 2024	164,441	163,327	99.32%	1,114	0.68%
March, 2024	170,447	169,363	99.36%	1,084	0.64%
April, 2024	168,979	167,812	99.31%	1,167	0.69%
May, 2024	173,226	171,978	99.28%	1,248	0.72%
June, 2024	178,488	176,976	99.15%	1,512	0.85%
July, 2024	191,096	189,650	99.24%	1,446	0.76%
August, 2024	186,461	185,127	99.28%	1,334	0.72%
September, 2024	187,593	185,426	98.84%	2,167	1.16%
October, 2024	187,542	185,930	99.14%	1,612	0.86%
November, 2024	173,709	172,286	99.18%	1,423	0.82%
December, 2024	167,610	166,323	99.23%	1,287	0.77%



Voice notifications

Month, Yr	Total Calls Attempted	Success Count	Success Rate	Failed Count	Failure Rate
January, 2024	8,016	7,629	95.17%	387	4.83%
February, 2024	7,383	7,020	95.08%	363	4.92%
March, 2024	6,977	6,692	95.92%	285	4.08%
April, 2024	7,075	6,748	95.38%	327	4.62%
May, 2024	7,263	6,943	95.59%	320	4.41%
June, 2024	7,185	6,843	95.24%	342	4.76%
July, 2024	7,774	7,402	95.21%	372	4.79%
August, 2024	7,542	7,190	95.33%	352	4.67%
September, 2024	7,113	6,784	95.37%	329	4.63%
October, 2024	7,308	6,928	94.80%	380	5.20%
November, 2024	6,742	6,414	95.13%	328	4.87%
December, 2024	6,543	6,208	94.88%	335	5.12%



Print Notices

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

Month/Yr	Bill Notices	Amount
January, 2024	581	\$ 501.95
February, 2024	428	\$ 372.36
March, 2024	349	\$ 303.63
April, 2024	378	\$ 274.86
May, 2024	467	\$ 406.29
June, 2024	428	\$ 372.36
July, 2024	450	\$ 404.50
August, 2024	471	\$ 433.32
September, 2024	426	\$ 391.92
October, 2024	518	\$ 505.08

November, 2024	475	\$ 437.00
December, 2024	543	\$ 499.56

SendGrid Statistics

Month/Yr	Total Requests	Total Processed	Success Rate (Delivered)	Addresses			Messages		
				Bounced	Marked as Spam	Invalid	Blocks	Bounce Drops	Spam Drops
Jan, '24	91,086	86,305	99.01% (85,455)	334	8	28	1,112	4,626	127
Feb, '24	69,276	67,302	99.09% (66,692)	179	5	39	817	1,806	129
Mar, '24	63,300	61,349	99.16% (60,835)	153	4	14	589	1,794	143
Apr, '24	70,264	68,177	99.03% (67,521)	148	3	24	935	1,931	132
May '24	75,532	73,381	98.92% (72,593)	162	14	22	1,405	2,003	126
Jun '24	83,855	82,001	98.95% (81,140)	200	6	40	1,492	1,672	142
Jul '24	82,085	79,731	98.76% (78,747)	232	8	38	1,558	2,066	250
Aug, '24	78,843	76,460	98.88% (75,545)	210	10	38	1,517	2,087	258
Sep, '24	66,608	64,428	98.75% (63,626)	194	2	34	1,018	1,890	256
Oct, '24	68,891	66,570	98.92% (65,856)	158	5	24	1,080	2,083	214
Nov, '24	61,629	59,468	98.91% (58,825)	141	3	31	765	1,907	223
Dec, '24	63,697	62,180	97.55% (60,660)	136	3	23	901	2,088	194

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
Orig 2020	99	111	69	152	98	129	88	102	76	62	56	46	1,088
Copy 2020	1,908	1,717	1,863	2,270	2,357	2,496	2,237	1,886	2,405	1,723	1,901	1,704	24,467
Orig 2021*	41	53	54	73	49	88	49	71	80	65	72	104	799
Copy 2021*	1,632	1,847	1,911	1,480	1,720	1,756	1,580	1,916	2,367	1,463	2,295	1,802	21,769
Orig** 2022	84	143	93	57	106	97	52	133	87	74	55	77	1,058
Copy**	1,808	2,283	2,059	2,299	2,239	1,886	1,976	2,706	1,944	1,918	2,010	2,275	25,403

2022													
Orig 2023	114	123	187	197	164	146	57	38	34	104	111	40	1,315
Copy 2023	2,925	2,213	2,352	1,819	2,630	2,310	1,752	2,215	1,875	2,338	1,968	1,838	26,235
Orig 2024	134	149	127	132	125	80	129	63	99	80	80	73	1,271
Copy 2024	2,072	1,936	1,633	1,967	1,727	1,630	1,658	1,293	1,652	2,030	2,002	2,107	21,707

Records Added in 2024

In December, 35,333 new items were added to our database, including 4,538 new catalog records. In total, the SWAN catalog contains 561,558 items that were added in 2025, approximately 7.6% of our total collection.

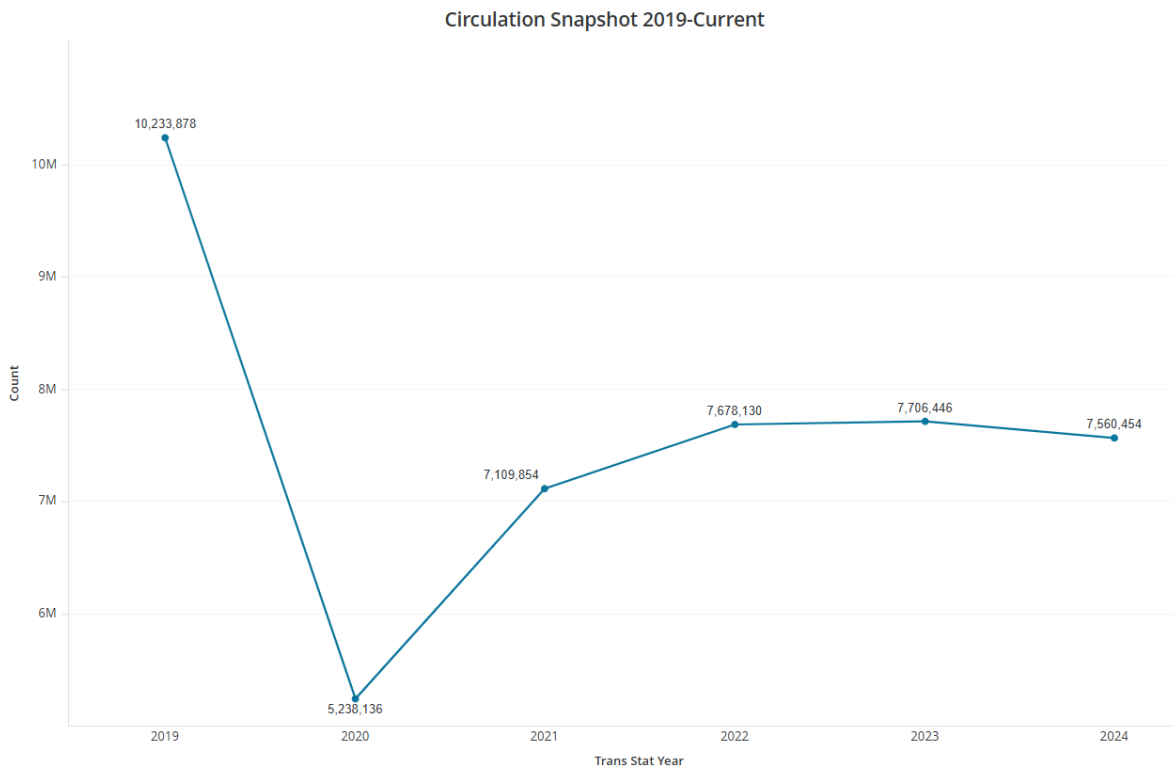
New bibliographic records (i.e. unique titles) total 61,193 over the course of the year, or 4.4% of our total selection.

Circulation

Monthly total comparison since 2019

In December, we had 522,243 systemwide circulations, which is 95.5% of the rate in December 2023 and 74.9% of the pre-pandemic count from December 2019.

Circulations totaled 7,560,454 systemwide in 2024, slightly less than years prior. Yearly circulation statistics over the past 6 years are visualized in the graph below:

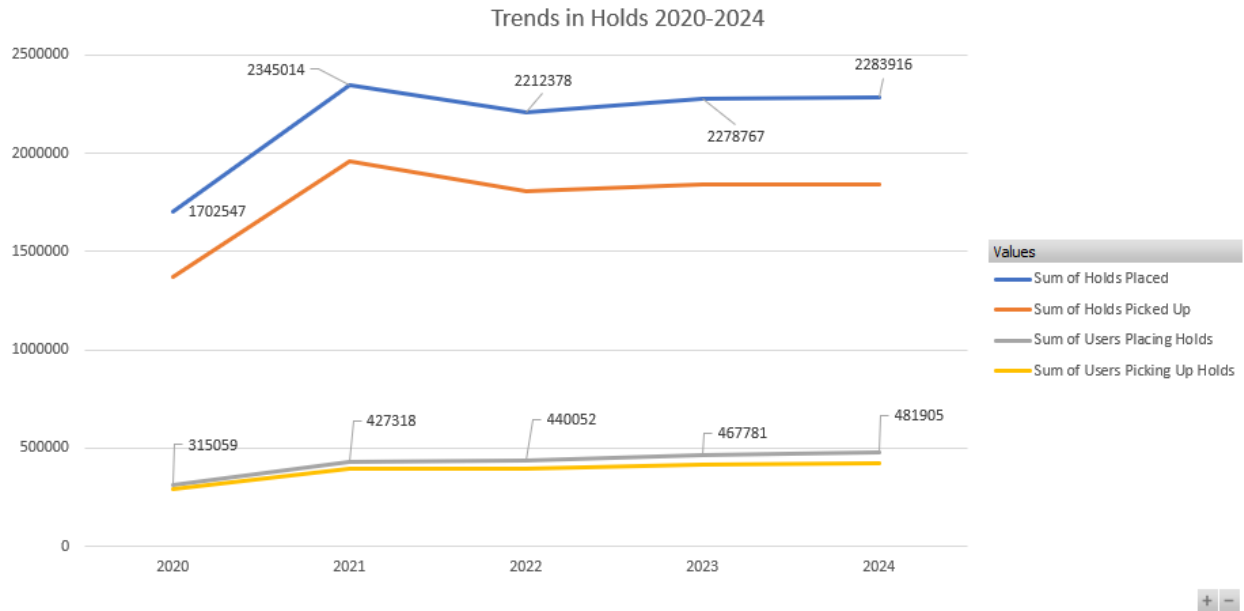


Hold

Hold Placement & Pick-up

The number of patrons placing holds was 36,241 in December, with 172,980 total holds placed.

Hold over the past 5 years maintain an overall steady level with a gentle increase in user placing holds since 2021. This is illustrated in the following graphic:



Interlibrary Loan & Resource Sharing

Interlibrary loan checkouts between SWAN members was 91,583 in December, for 19% of total checkouts.

Reciprocal borrowing between SWAN libraries totaled another 18% of total checkouts at 87,973 checkouts. Non-SWAN reciprocal borrowing made up another 3% of checkouts as usual.

OCLC Worldwide Resource Sharing

Our combined OCLC interlibrary loan statistics show that SWAN was again a net lender in November by a ratio of 2.08 items lend for each item borrowed. We lent 2,302 items and 9 copies and borrowed 1,106 items and 16 copies.

Online Public Catalog - Aspen

Top 25 Searches in Aspen (December 2024)

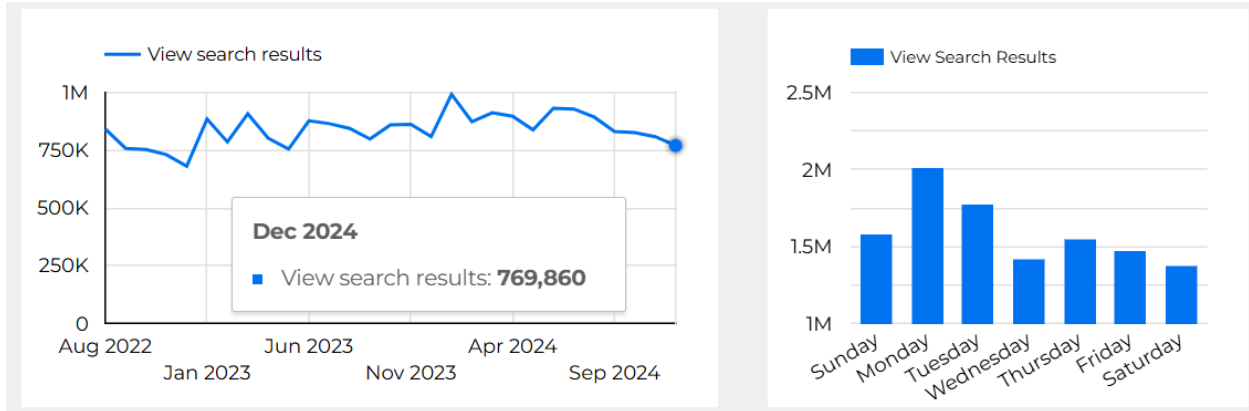
1. christmas
2. nintendo switch
3. wicked
4. freida mcfadden
5. winter
6. dvd
7. ps4. games
8. james
9. snow

- 10. movies
- 11. the women
- 12. the god of the woods
- 13. consumer reports
- 14. grinch

- 15. dog man
- 16. the wild robot
- 17. conclave
- 18. small things like these
- 19. christmas movies

- 20. library of things
- 21. the housemaid
- 22. pokemon
- 23. harry potter
- 24. the wedding people
- 25. colleen hoover

Results Pageviews in Aspen

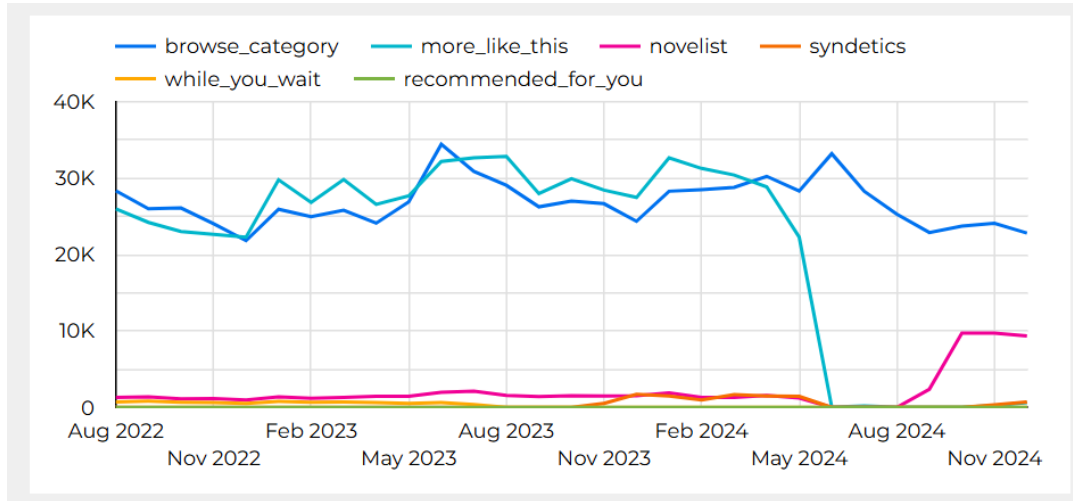


Usage of Recommendations

This data measures clicks on title recommendations presented to patrons.

- Browse categories appear on the home page and they are generated by library staff
- “More Like This” were auto-generated by ProQuest Syndetics and appeared on a grouped work or record detail page – *removed June 2024 and replaced with the new Novelist Select display.*
- “While You Wait” are auto-generated by Aspen, and appear when you place a hold or view your holds and checkouts.
- “Recommended for you” appears in My Account for patrons that use the star rating tool.
- “Novelist” refers to Novelist Select, which was upgraded to a new version in June 2023. October 2024 is the first full month of statistics available for the new version.

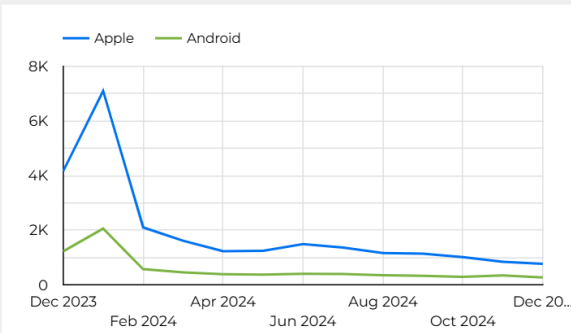
- “Syndetics” refers to Syndetics Unbound recommendations, which were enabled in some catalogs from November 2023 to May 2023



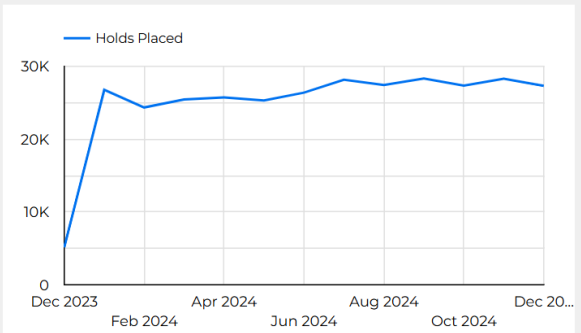
SWAN Libraries + App – Aspen LiDA

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

Downloads by Platform



Holds Placed via Mobile App



SWAN
Calendar-Timetable of Deadlines and Board Action Requirements

DATE	MEETING TYPE	ACTION ITEMS
Friday, July 19, 2024	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. Approve schedule for regular board meetings for next 12 months.
Friday, August 16, 2024	Regular SWAN Board Meeting	Meeting often conflicts with SWAN Expo. Decision on recommend to cancel meeting.
Thursday, September 5, 2024	SWAN Quarterly Meeting	Introduce new SWAN Board members
Friday, September 20, 2024	Regular SWAN Board Meeting	Closed session minutes 6 month review Identify SWAN policies to review. Review budget process timetable with SWAN Board.
Friday, October 18, 2024	Regular SWAN Board Meeting	Aaron begins work on FY26 budget, brings questions to SWAN Board if needed.
Friday, November 22, 2024	Regular SWAN Board Meeting	Board accepts FY24 audit. Aaron to bring FY26 Budget draft; Board discuss Fees and determines next steps. Board approves meeting dates for 2025 calendar
Friday, December 20, 2024	Regular SWAN Board Meeting	Review of FY26 Budget Draft
Friday, January 24, 2025	Regular SWAN Board Meeting	Review and recommend draft of SWAN Budget for Membership presentation. Set COW date for February for membership review.
Tuesday, February 4, 2025	Committee of the Whole meeting (virtual)	Meeting to discuss FY23 budget, fees, and reserves worksheet.
Friday, February 21, 2025	Regular SWAN Board Meeting	Incorporate changes, suggestions to SWAN budget. Create recommendation to membership. SWAN Board Election Process Review.
Thursday, March 6, 2025	SWAN Quarterly Meeting	Roll call vote to approve SWAN budget. Announce Board election process.
Friday, March 21, 2025	Regular SWAN Board Meeting	
Friday, April 18, 2025	Regular SWAN Board Meeting	Review and approve Board Self Evaluation Form; assign date for completion.
Friday, May 23, 2025	Regular SWAN Board Meeting	Review Board Self-Evaluation Results.
Thursday, June 5, 2025	SWAN Quarterly Meeting	Board Election Results. Vote on Bylaw amendments (if any).
Friday, June 20, 2025	Regular SWAN Board Meeting	Review/Write Off Allowance for Doubtful Accounts. Director Evaluation - Provide results and discuss (Executive Session).

SWAN Board & Membership Meeting Schedule 2024 - 2025

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
Friday, July 19, 2024	Regular SWAN Board Meeting	SWAN headquarters
Friday, August 16, 2024	Regular SWAN Board Meeting	Canceled
Thursday, September 5, 2024	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, September 20, 2024	Regular SWAN Board Meeting	Glen Ellyn Public Library
Friday, October 18, 2024	Regular SWAN Board Meeting	Tinley Park Public Library
Friday, November 22, 2024	Regular SWAN Board Meeting	Tinley Park Public Library
Thursday, December 5, 2024	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, December 20, 2024	Regular SWAN Board Meeting	Blue Island Public Library
Friday, January 24, 2025	Regular SWAN Board Meeting	Blue Island Public Library
Tuesday, February 4, 2025	Committee of the Whole meeting (virtual)	Zoom meeting
Friday, February 21, 2025	Regular SWAN Board Meeting	Glen Ellyn Public Library
Thursday, March 6, 2025	SWAN Quarterly Meeting	Oak Brook Public Library
Friday, March 21, 2025	Regular SWAN Board Meeting	Roselle Public Library District
Friday, April 18, 2025	Regular SWAN Board Meeting	Roselle Public Library District
Friday, May 23, 2025	Regular SWAN Board Meeting	Palos Heights Public Library
Thursday, June 5, 2025	SWAN Quarterly Meeting	Oak Brook Public Library



SWAN Budget Fiscal Year 2026

July 1, 2025 – June 30, 2026

SWAN Budget Information & Guidelines

Fiscal Year 2026 (July 1, 2025 – June 30, 2026)

Introduction

The SWAN budget is introduced to the SWAN Board at its November meeting, with scheduled input from library directors at a February Committee of the Whole meeting, and concluding with a membership approval at the March SWAN Quarterly meeting.

Budget Highlights

Online Patron Registration enhanced for membership

This budget includes the subscription service for online patron registration to be provided, as presented at the September 5, 2024 meeting of library directors and administrators. The online patron registration will include an advanced verification of identity for the patron applying for a library card. The use of GIS maps will be incorporated which will allow the proper home library of the patron to be determined during the registration process. The two options of Quipu eCard and Patron Point eCard will be pursued after passage of this budget at the March 6, 2025 Quarterly meeting.

Novelist Select subscription cancelled

The role of Novelist Select within the SWAN online catalog up until recently was unique in its ability to provide reading suggestions under the "More Like This" section of a title record. After research for an alternative, ProQuest Syndetics Unbound can provide a similar experience to the public, at a considerable savings to SWAN. Starting July 1, 2026, this budget will end Novelist Select subscription at \$59,059 per year and instead use the Syndetics Unbound subscription at \$19,767 already in place.

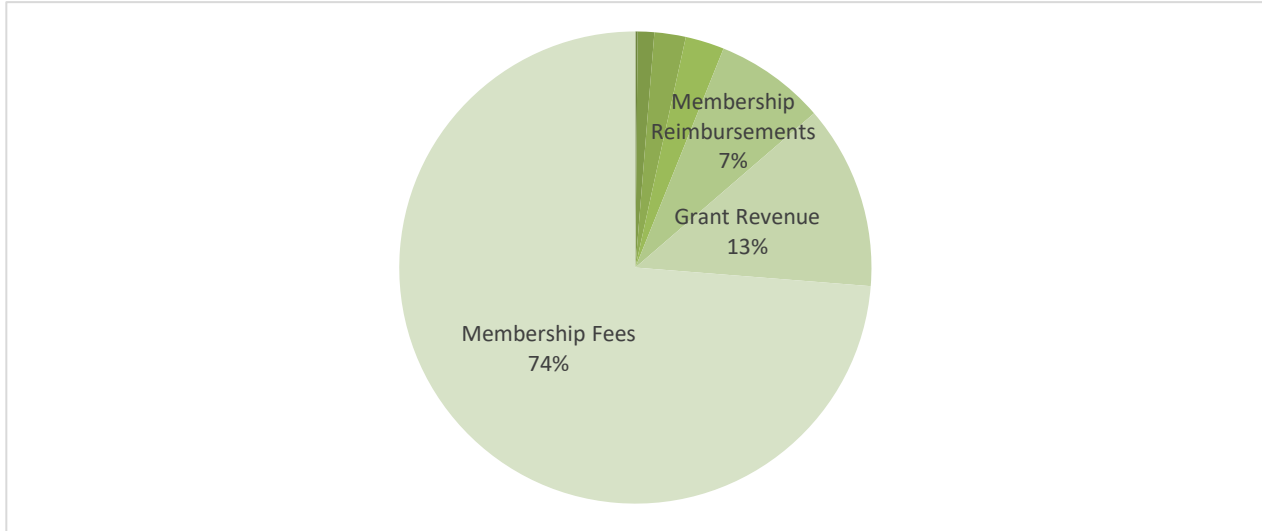
Office headquarters relocation savings

The FY26 budget will reflect the significant savings with the change of SWAN's office headquarters. SWAN is seeing a savings of \$95,658 compared to what the actual FY24 expense was for the sum of these budget lines.

Membership fees increase 2%

The overall increase for the Membership Fees is just over 2%. Membership fees are based on the 2022 tax year, and the variations of the tax revenue and debt service per library will result in individual library fee changes.

Revenue



Membership Fees

4010 SWAN Full Membership Fees \$2,933,139

SWAN assesses membership fees based on academic, school, special, and public library. The formulas used for each are detailed on the SWAN support site under About > Board > Budget & Fees. SWAN's FY26 membership fees are based on the 2022 tax year, and the variations of the tax revenue and debt service per library will result in individual library fee changes.

4011 SWAN Internet Access Membership Fees \$3,700

The Internet Access level service for school libraries continues through this fiscal year with 10 schools participating with partner SWAN member public libraries.

Membership Reimbursements

4110 Member One-Time Project Receipts \$0

This budget line would be used if a library needed to reimburse SWAN for one-time expenses incurred. For example, if the RAILS Catalog Grant were no longer available, a library joining SWAN would pay SWAN for the one-time expenses for the vendor expenses. No one-time projects are anticipated for this budget.

4190 Member Group Purchase Receipts \$301,600

Libraries that reimburse SWAN for group purchases are indicated in this budget line. EBSCO database group-purchase revenue collected from public libraries participating in the RAILS Flagship package deal. Additional group purchases such as Comics Plus from Library Pass are included in this revenue line.

Reimbursements

4220 Reimbursement Losses for Resource Sharing \$42,000

Revenue associated with reimbursement for ILL or reciprocal borrowing with libraries outside of the SWAN consortium, e.g. Chicago Public Library.

4230 Collection Agency Fees \$0

SWAN may collect a modest fee for administering services within the Unique Management collection of unpaid reciprocal borrower invoices. This budget no longer includes the revenue.

4240 E-commerce transactions \$43,400

Payments made through the Aspen Discovery catalog by library users will be recorded as revenue and then distributed back to member libraries as an expense off-set in this budget.

4250 Deaccession transactions \$0

Revenue collected from deaccession of SWAN equipment or furniture.

Grant Revenue

4310 RAILS Support to SWAN \$501,394

RAILS provides support to SWAN through an annual grant to support regional resource sharing. The grant amount to SWAN is divided equally between all public libraries and is indicated as a discount off SWAN membership fees. The funding from RAILS is based on a formula which divides a grant \$2.25 million between six entities known as LLSAPs.

4320 Other Grant Revenue \$0

Revenue received as part of the addition of a new library to SWAN will be recorded in this budget line. No joining libraries are planned for this budget year.

Registration & Event Receipts

4499 Annual Conference Receipts \$6,260

Any revenue collected as part of the SWAN Expo are recorded in this budget line. This includes vendor table fees or libraries invoices for the event to offset event catering. This budget includes the annual conference event.

Investment & Interest

4510 Interest Income \$85,000

SWAN interest income is generated from a Money Market account with interest rates adjusting based on financial markets. The rates over the past year have been steadily increasing, and this budget anticipates a higher yield than last year's budget.

4520 Investment Income \$21,000

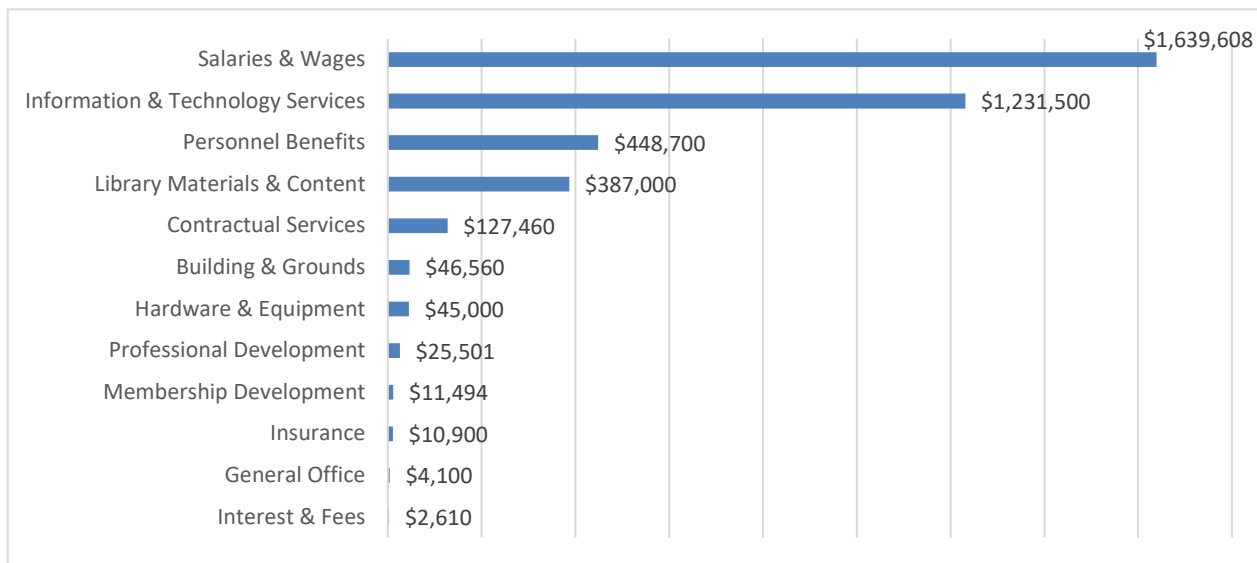
SWAN currently is a member of IMET. The annual income is recorded in this budget revenue line.

Reserves Funding

4600 Reserves Funding \$45,000

The reserve fund for SWAN is tracked on the monthly finance report as unrestricted funds. The use of the excess operating fund is recommended for one-time expenses for the consortia, such as the addition of a new service that has one-time setup fees. This budget includes a one-time expense for SWAN staff laptop replacement.

Expenses



Salaries & Wages

5000 Salaries & Wages \$1,639,608

SWAN has left positions unfilled and eliminated a position to remain flexible within the strategic plan. This year that this budget line is increased 4.0%, which allows for SWAN's merit process and salary increases.

Personnel Benefits

5021 Social Security Taxes \$125,600

Payroll taxes and fringe benefits-- employer's share only. Social Security taxes (FICA). The lower expense is due to position attrition.

5022 State Unemployment Insurance \$0

Organization pays unemployment directly should it be required.

5023 Worker's Compensation \$4,700
Organization insurance provided by insurance vendor.

5024 Retirement Benefits \$138,300
SWAN provides its employees a 401a retirement plan through ICMA-RC. The organization does not provide a defined benefit plan or participate in Illinois Municipal Retirement Fund (IMRF).

5025 Health, Dental, Life And Disability Insurance \$178,600
Employee health insurance is provided by LIMRiCC Purchase of Health Insurance Program (PHIP). This budget reflects a reduction due to changes with employee benefit selections.

5026 Tuition Reimbursements \$1,100
Tuition reimbursement benefit for employees.

5085 Staff Wellness \$400
Benefit offered to SWAN employees for participation within the employee Wellness Plan which includes incentives for breaktimes for walking, pedometers, exercise, and healthy lifestyles. No change from the prior budget.

Building & Grounds

SWAN headquarters relocated in December 2024, and the operating expenses have decreased significantly in the smaller, new location.

5110 Rent/Lease \$41,800
SWAN signed a 7-year lease in 2024 for office space. This budget reflects 2 months of the rent abatement per the lease, and 10 months expense based on a smaller commercial space.

5120 Utilities \$3,800
Facility electricity and natural gas expenses are recorded in this line. Anticipated to be lower in FY26 based on square foot reduction of office space.

5130 Property Insurance \$0
Property and flood insurance covers office space furniture and equipment.

5140 Repairs & Maintenance \$960
Used for facility repairs including door fob security maintenance and repairs.

5150 Custodial Service & Supplies \$0
Cleaning service is provided as part of the office lease.

5190 Other Building Maintenance **\$0**
Used for alarms and security cameras related to facility expense.

Professional Development

This budget category focuses on providing professional development for SWAN employees. This includes training, conferences, and travel.

5210 Conference Travel **\$10,000**
SWAN staff attend various conferences annually such as ILA, COSUGI, ALA, or the COSUGI Consortia Special Interest Group meeting. This includes expenditures for overnight lodging, fares for airfare, planes, trains, taxicabs, auto rental, meals, etc. There is planned conference travel in this 'budget.

5220 Staff Meetings **\$901**
Expenses related to SWAN staff meetings, mostly food and a holiday luncheon, are recorded in this line.

5230 Staff Professional Development **\$8,800**
SWAN employees participate in presentations at ILA, ALA, COSUGI and other professional organization events. Attending the annual COSUGI conference is a must for SWAN staff as it allows the organization to plan for upcoming library software features and functions.

5240 Professional Association Membership Dues **\$2,500**
SWAN employees participate in ALA, ILA, and COSUGI activities, often presenting at conferences. Individual

5250 Educational Material **\$800**
This budget reduces some of the online learning expenses for employees.

5260 Online Learning **\$2,500**
SWAN employee training and courses on best security practice, identifying and preventing phishing attempts, and training as required by law.

Membership Development

This budget category focuses on providing professional development for the member libraries within SWAN. This includes SWAN staff consulting, leading meetings, and facilitating membership networking events.

5310 Travel Reimbursement **\$900**
The SWAN organization has no vehicles and reimburses employees for mileage attending the 50+ membership meetings held annually. Travel expenses are reduced for the budget due to the pandemic, but some mileage reimbursement will occur.

- 5320 Membership Meetings** **\$0**
 Refreshments for the 50+ membership advisory and user group meetings held annually, such as coffee and donuts, or other activity supplies. Reduced to zero for the budget post-pandemic.
- 5330 Library Professional Development** **\$8,094**
 Subscription expenses for learning management system and online tutorial coursework. Library staff have the ability to complete interactive training and within the learning management system, complete courses to master skills in the software systems SWAN provides. Expenses include Articulate Storyline, and Inquisiq, which are components of SWAN's Learning Management System.
- 5350 Marketing & Promotional Material** **\$0**
 Expenses related to printing library promotional material such as bookmarks or brochures.
- 5399 Annual Conference** **\$2,500**
 SWAN's annual conference, called SWAN Expo, supports speaker fees, honorarium, and travel expense for speakers. Costs associated with the facility and event are noted with the budget lines ending in "99" within this budget chart of accounts.

Information & Technology Services

This budget category includes technology expenses related to SWAN's resource sharing platform. The platform includes expenses related to the technology required to run the platform for library content within the consortium.

- 5420 Application Software Licensing** **\$20,300**
 Expenses related to SWAN's support software application include employee tools to create videos, deploy client software, design presentations, run meetings, and create instructional material. Vendor licensing includes: Formsite (webform software subscription), SurveyMonkey (for ongoing usability Input), MailChimp for e-newsletter, Adobe Acrobat, Adobe Creative Suite, Asana, Articulate Storyline, LastPass, Microsoft Office O365, Microsoft Visio Pro O365, Panda Virus Protection & Patch Management, and MSI Package Installer.
- 5430 Server Software Licensing** **\$118,800**
 Expenses related to SWAN's support infrastructure including SSL Certificates for SWAN, domain subscription, SonicWALL Security licensing and subscription, Microsoft Active Directory, Microsoft Azure, and Microsoft Server licenses. This budget includes shift in expenses for SWAN hosting Aspen in Microsoft Azure as that service is helpdesk system hosting. The server licensing expenses related to SWAN's library services platform to run SirsiDynix Symphony and test systems. The single sign-on service at \$27,000 annually was added last year, which will simplify library staff access to SWAN's growing web-based platforms, as well as providing enhanced security through management of users with this identify service provider.

5440 Library Services Platform \$993,100

The heart of SWAN’s resource sharing software platform expenses is recorded in this budget line, including expenses from SirsiDynix, OCLC, and EBSCO Discovery Services, and OpenAthens. For FY26, SirsiDynix expenses are budgeted for \$365,864, OCLC at \$318,848, and the Article Search integration through EBSCO Discovery Services and OpenAthens is \$121,621 total. Support from ByWater Solutions for SWAN’s Aspen Discovery Services is \$102,350. SWAN’s SirsiDynix agreement renews with an assumed 2% increase. OCLC expenses for this budget are based on the prior year’s total invoice and anticipates a 2.25% escalation. EBSCO expenses for OpenAthens and Discovery Service renew in FY26 with escalations anticipated at 2%. Hosting support for the Aspen Library Discovery App (LiDA) is included at \$4,600. The new subscription for online patron registration is budgeted at \$16,500.

5450 Data Management Services \$37,600

Expenses related to maintaining bibliographic and user data within the SWAN library services platform. This includes software provided to cataloging libraries to maintain bibliographic standards of the consortium. Vendors expenses include: ALA RDA Toolkit for Cataloging Libraries, WebDewey (OCLC negotiated directly with SWAN), and MARCIVE (ongoing authority updates). The National Change of Address (NCOA) is processed annually with Unique Management which updates the patron database address data at \$13,000 expense annually.

5460 Information Subscription Service \$20,400

SWAN’s discovery platform includes ProQuest Syndetic Ubound services to add cover artwork and reading recommendations. The Novelist Select subscription is not renewed in this budget.

5470 Subscription Support Services \$33,800

SWAN’s support platform includes virtual meeting hosting for all governance and user groups, remote desktop assistance to library staff, and remote monitoring of systems for SWAN on-call staff. Expenses associated with this budget line include: Zoom virtual meeting platform, StatusCake (for site monitoring and alerting SWAN staff to outages), and the volume email service through SendGrid (patron notification plus library notification).

5480 Telecommunications \$7,500

Expenses associated with SWAN facility connection to the internet and phone support is unchanged with an office relocation.

5490 Group Purchases - Services \$600

SWAN will periodically arrange a software group purchase. Those expenses are recorded here if libraries are invoiced back for the expense, which would be recorded as revenue in the budget line 4190. The budget is supporting an ongoing Envisionware software group purchase for a self-check system, which has annual maintenance for support.

General Office

This category is primarily the expenses associated with running the organization's headquarters at 800 Quail Ridge Drive.

5510 Office Supplies \$3,300

Expenses associated with routine office work including paper, staff supplies, and anything costing less than \$5,000.

5520 Postage \$800

Expenses associated with shipping printed material are recorded in this line. SWAN staff make best attempts to control shipping costs through bringing printed material to membership events.

5550 Furniture \$0

If SWAN needs to add any training or collaboration furniture for the facility conference room or work areas, this is the budget and expense is recorded.

5599 Annual Conference Supplies \$0

All supply expenses associated with the annual conference SWAN Expo which include envelopes, paper, and presentations. SWAN Expo will take place this fiscal year.

Hardware & Equipment

SWAN utilizes a very light footprint for its headquarters, staff, and services to libraries.

5610 Equipment Rental/Maintenance \$0

All expenses associated with equipment leased at SWAN's office, including the single staff multi-use copier printer. This lease was discontinued in FY25.

5620 Hardware \$45,000

Expenses for this budget related to SWAN staff computer equipment replacement, to be funded with SWAN excess cash reserves.

5690 Group Purchases - Hardware \$0

Any pass-through purchases for equipment required for membership, such as firewall, commerce, or print solutions required by SWAN.

Insurance

SWAN organization insurance includes insuring the SWAN governing board, facility, and business for risk of crime and cybercrime.

5700 Insurance \$10,900
The SWAN organization insurance for directors and officers, cyber crime, and business owner’s insurance.

Contractual Services

The SWAN organization contracts with various companies for services such as a law firm for legal opinions, accounting services, financial audit, payroll, and notification services for library users.

5810 Legal \$1,500
SWAN utilizes legal services with Klein, Thorpe, Jenkins for various activities and inquiries as they arise during the year.

5820 Accounting \$22,060
Expenses associated with activities include SWAN annual audit, and the accounting service with Lauterbach & Amen.

5830 Consulting \$1,300
Expenses for vendor consulting for facilitation, strategic planning, or other one-time services are recorded in this budget line. This budget includes one-time expenses for paid software development to ByWater Solutions for prioritizing Aspen LiDA feature requests from SWAN.

5840 Payroll Service Fees \$4,600
Expenses for the payroll service provided through Paylocity.

5850 Contractual Agreements \$0
Expenses for one-time costs within the fiscal year for adding member libraries to the consortium are recorded in this line. These expenses would be offset by the revenue line 4320 Other Grant Revenue.

5860 Notification & Collection \$85,900
This budget includes the new service for all 100 member libraries to have email and SMS messages enhanced and sent through the MessageBee service provided by Unique Management. All 100 library notifications sent via automated phone calls are also provided through MessageBee. SWAN has also contracted with a Unique Management to print all user notices at \$5,064 annually.

5870 Recruitment \$0
Costs for personnel search, advertising of an open position at SWAN.

5899 Annual Conference Facility Contract \$12,100
SWAN Expo at Moraine Valley Community College Business and Conference Center has a one-day cost for the location plus food provided for the event. This budget has included the facility rental at the Business and Conference Center, based on the amount paid last year for the event.

Library Materials & Content

SWAN's chart of accounts includes budget lines for the organization to provide content to libraries—be it print, electronic, or as a group purchase pass-through.

5910 Print Materials \$0
This line is intended to supplement printing services for promotional material or print collections supplied to member libraries.

5920 Reimbursement for Resource Sharing \$42,000
Expenses related to the SWAN member libraries centralized reimbursement of unreturned material. The expenses in this line are offset by revenue in the 4220 Reimbursement Losses for Resource Sharing line.

5930 Group Purchases - Content \$0
This line's purpose is for online content provided to all libraries as part of SWAN's membership fees. It may include eBook content, online databases subscriptions, or other e-content.

5940 E-commerce payment transactions \$43,400
Expenses related to the Aspen Discovery online payments through PayPal. Library payments will be collected in the revenue budget line 4240 and quarterly reconciliation and payments back to the libraries are recorded in this budget line.

5990 Group Purchases - Electronic Resources \$301,600
SWAN negotiated group purchase for online subscriptions through RAILS EBSCO Flagship package for 50 member public libraries. The associated revenue offset in the revenue 4190 budget line.

Interest & Fees

6010 Bank Fees \$2,560
Expenses associated with bank fees for stopping checks or other services are recorded in this line. The banking service for lock box deposits is included in this budget line.

6020 Merchant Account Fees \$50

SWAN subscribes to ProPay as part of the BLUEcloud Commerce required for online Enterprise payments. SWAN pays \$40 annually, as do all member libraries within the ProPay service.

6030 Interest Payment \$0

Expenses for any loan or debt service payments would be recorded in this line. SWAN currently has no expenses for this line.

6099 Annual Conference Merchant Fees \$0

Expenses associated with any online transaction fees for processing annual conference SWAN Expo online payments are recorded in this line.

Asset Management

6110 Depreciation \$1,460

For proprietary funds and government-wide financial statements only. Depreciation charges are intended to allocate the cost of a fixed asset over the estimated useful life of the unit in a systematic and rational manner using the straight-line method. The number of physical assets depreciated has fallen dramatically since SWAN moved to an infrastructure-as-a-service model and no longer needs to purchase servers over \$5,000. Two expenses are in their final years of depreciation.

6120 (Gain)/Loss on Asset Disposal \$0

6130 Vacation Expense \$0

Per GASB, Vacation Expense is the account created to segregate the amount of the expense incurred by SWAN for the current years' addition or subtraction to the balance of earned but unused staff vacation time. This expense from budget in prior years was deemed no longer required for SWAN.

Revenue & Expense Budget		FY24 Actual	FY25 Budget	FY26 Budget draft	Change from FY25 to FY26
Revenue					
4000	Membership Fees				
4010	SWAN Full Membership Fees	\$3,088,292	\$2,871,727	\$2,933,139	\$61,412
4011	SWAN Internet Access Membership Fees	\$3,639	\$3,700	\$3,700	\$0
4100	Membership Reimbursements				
4110	Member One-Time Project Receipts	\$0	\$0	\$0	\$0
4190	Member Group Purchase Receipts	\$491,241	\$491,375	\$301,600	(\$189,775)
4200	Reimbursements				
4220	Reimbursement Losses for Resource Sharing	\$41,624	\$50,000	\$42,000	(\$8,000)
4230	Collection Agency Fees	\$0	\$0	\$0	\$0
4240	E-commerce transactions	\$45,729	\$43,000	\$43,400	\$400
4250	Deaccession transactions	\$0	\$5,000		
4300	Grant Revenue				
4310	RAILS Support to SWAN	\$499,038	\$500,616	\$501,394	\$778
4320	Other Grant Revenue	\$19,224	\$0	\$0	\$0
4400	Registration & Event Receipts				
4499	Annual Conference Receipts	\$6,260	\$5,000	\$6,260	\$1,260
4500	Investment & Interest				
4510	Interest Income	\$84,552	\$83,328	\$85,000	\$1,672
4520	Investment Income		\$0	\$21,000	\$21,000
4600	Reserves Funding	\$17,592	\$40,000	\$45,000	\$5,000
Total Revenue		\$4,297,191	\$4,093,746	\$3,982,493	(\$111,253)
Expenses					
5000	Salaries & Wages	\$1,451,934	\$1,577,736	\$1,639,608	\$61,872
5020	Personnel Benefits				
5021	Social Security Taxes	\$107,418	\$120,700	\$125,600	\$4,900
5022	State Unemployment Insurance	\$0	\$0	\$0	\$0
5023	Worker's Compensation	\$4,908	\$4,719	\$4,700	(\$19)
5024	Retirement Benefits	\$137,217	\$143,700	\$138,300	(\$5,400)
5025	Health, Dental, Life And Disability Insurance	\$178,582	\$174,800	\$178,600	\$3,800
5026	Tuition Reimbursements	\$0	\$1,100	\$1,100	\$0
5085	Staff Wellness	\$155	\$400	\$400	\$0
5100	Building & Grounds				
5110	Rent/Lease	\$131,461	\$88,000	\$41,800	(\$46,200)
5120	Utilities	\$5,501	\$4,300	\$3,800	(\$500)
5130	Property Insurance	\$642	\$650	\$0	(\$650)
5140	Repairs & Maintenance	\$1,465	\$960	\$960	\$0
5150	Custodial Service & Supplies	\$3,149	\$3,500	\$0	(\$3,500)
5190	Other Building Maintenance	\$0	\$0	\$0	\$0

Revenue & Expense Budget		FY24 Actual	FY25 Budget	FY26 Budget draft	Change from FY25 to FY26
5200	Professional Development				
5210	Conference Travel	\$5,089	\$6,000	\$10,000	\$4,000
5220	Staff Meetings	\$390	\$900	\$901	\$1
5230	Staff Professional Development	\$8,441	\$4,000	\$8,800	\$4,800
5240	Professional Association Membership Dues	\$1,361	\$2,500	\$2,500	\$0
5250	Educational Material	\$79	\$800	\$800	\$0
5260	Online Learning	\$668	\$500	\$2,500	\$2,000
5300	Membership Development				
5310	Travel Reimbursement	\$861	\$800	\$900	\$100
5320	Membership Meetings	\$160	\$0	\$0	\$0
5330	Library Professional Development	\$6,921	\$7,450	\$8,094	\$644
5350	Marketing & Promotional Material	\$0	\$0	\$0	\$0
5399	Annual Conference	\$0	\$2,500	\$2,500	\$0
5400	Information & Technology Services				
5420	Application Software Licensing	\$20,265	\$16,800	\$20,300	\$3,500
5430	Server Software Licensing	\$162,455	\$121,800	\$118,800	(\$3,000)
5440	Library Services Platform	\$830,443	\$921,000	\$993,100	\$72,100
5450	Data Management Services	\$28,777	\$33,000	\$37,600	\$4,600
5460	Information Subscription Service	\$19,971	\$75,700	\$20,400	(\$55,300)
5470	Subscription Support Services	\$5,590	\$23,200	\$33,800	\$10,600
5480	Telecommunications	\$13,191	\$14,500	\$7,500	(\$7,000)
5490	Group Purchases - Services	\$15,567	\$700	\$600	(\$100)
5410	Infrastructure Licensing	\$235			
5500	General Office				
5510	Office Supplies	\$3,292	\$2,200	\$3,300	\$1,100
5520	Postage	\$763	\$500	\$800	\$300
5550	Furniture	\$0	\$10,000	\$0	(\$10,000)
5599	Annual Conference Supplies	\$194	\$0	\$0	\$0
5600	Hardware & Equipment				
5610	Equipment Rental/Maintenance	\$956	\$0	\$0	\$0
5620	Hardware	\$0	\$2,000	\$45,000	\$43,000
5690	Group Purchases - Hardware	\$20,483	\$0	\$0	\$0
5700	Insurance	\$11,218	\$11,400	\$10,900	(\$500)
5800	Contractual Services				
5810	Legal	\$1,226	\$1,500	\$1,500	\$0
5820	Accounting	\$19,105	\$19,160	\$22,060	\$2,900
5830	Consulting	\$4,435	\$5,000	\$1,300	(\$3,700)
5840	Payroll Service Fees	\$4,557	\$4,500	\$4,600	\$100
5850	Contractual Agreements	\$21,624	\$0	\$0	\$0
5860	Notification & Collection	\$85,459	\$86,700	\$85,900	(\$800)
5870	Recruitment	\$0	\$0	\$0	\$0
5899	Annual Conference Facility Contract	\$8,936	\$8,900	\$12,100	\$3,200
5900	Library Materials & Content				
5910	Print Materials	\$0	\$0	\$0	\$0
5920	Reimbursement for Resource Sharing	\$41,685	\$50,000	\$42,000	(\$8,000)
5930	Group Purchases - Content	\$0	\$0	\$0	\$0

Revenue & Expense Budget		FY24 Actual	FY25 Budget	FY26 Budget draft	Change from FY25 to FY26
5940	E-commerce payment transactions	\$43,363	\$43,000	\$43,400	\$400
5990	Group Purchases - Electronic Resources	\$458,548	\$491,375	\$301,600	(\$189,775)
6000	Interest & Fees				
6010	Bank Fees	\$2,562	\$2,424	\$2,560	\$136
6020	Merchant Account Fees	\$871	\$50	\$50	\$0
6030	Interest Payment	\$0	\$0	\$0	\$0
6099	Annual Conference Merchant Fees	\$0	\$0	\$0	\$0
Subtotal Expenses		\$3,872,170	\$4,091,424	\$3,981,033	(\$110,391)
6100	Asset Management				
6110	Depreciation		\$2,322	\$1,460	(\$862)
6120	(Gain)/Loss on Asset Disposal				
6130	Vacation Expense				
6140	Miscellaneous Expense				
Total Expenses		\$3,872,170	\$4,093,746	\$3,982,493	(\$111,253)
Total Revenue (from above)		\$4,297,191	\$4,093,746	\$3,982,493	
Excess of revenues over (under) estimated expenses		\$425,021	\$0	\$0	

SWAN Reserves Plan: Updated for FY26 Budget

Capital Expenditures	FY25	FY26	FY27	FY28
	July 2024-June 2025	July 2025-June 2026	July 2026-June 2027	July 2027-June 2028
Prior Year Balance: End of fiscal year, final audit, see "Unrestricted" on Balance Sheet	\$2,600,427	\$2,560,427	\$2,515,427	\$2,515,427
Reserves collected & Impact Fee	\$0			
Strategic planning consultant				
Website development consultant				
Single Sign On: Identity service provider one-time	(\$35,000)			
Funds for SWAN office relocation	(\$5,000)			
Funds for SWAN staff computer replacement		(\$45,000)		
Future ILS Migration Budget (\$465,740)				
Total	\$2,560,427	\$2,515,427	\$2,515,427	\$2,515,427
Maintain 4 months operating in reserve (policy)	(\$1,364,582)	(\$1,326,431)	(\$1,392,753)	(\$1,462,390)
Over/(Under) Reserve Policy	\$1,195,845	\$1,188,996	\$1,122,674	\$1,053,036
Operating Budget (5% increases each year after FY26)	\$4,093,746.37	\$3,979,293.38	\$4,178,258.05	\$4,387,170.95
Months operating in reserve	7.51	7.59	7.22	6.88

Explanation of Membership Fees

The goal of the SWAN fee formula is (1) Resource sharing, and (2) Sustainability. Using these as our guiding principles, the fee formula utilizes specific metrics that could measure the contribution to resource sharing to the consortium and identify tactics that are sustainable. We define sustainable as a consistent, verifiable metric, and in addition, a metric that is well-grounded within a membership fee formula for SWAN's foreseeable future.

Academic Libraries

The academic membership fee is based on a similar model as CARLI's I-Share membership fee. We believe this is equitable for these institutions. Comparable pricing helps reinforce the importance of the academic I-Share consortium by eliminating competition for library members based solely on cost.

- 1) Student Population (IBHE Profile), rounded to nearest 1,000 X 2
- 2) Item Count rounded to nearest 1,000 / 3

Data on student population is gathered from the Illinois Board of Higher Education website via [IBHE under the institution profile](#).

School Libraries

School membership in SWAN will require a formal partnership with a public library in SWAN. This partnership will ensure sustainability and balanced use of consortium support, while facilitating year-round library use for students affiliated with those schools.

- 1) Student Population (Illinois Report Card), rounded to nearest 1000 X 5
- 2) Building Location/Branch Fee \$2,500 per building

Data for student population is gathered from the [Illinois Report Card](#).

Special Libraries

Special libraries' contribution to the consortium is primarily titles in print, which is why this metric was used.

- 1) Title Fee (Tier 1 <10,000 \$7,500; Tier 2 <40,000 \$10,000; Tier 3 > 40,000 \$12,500)
- 2) Building Location/Branch Fee \$2,500 per building

Public Libraries

Public libraries represent the majority of member institutions in SWAN. The goal of a Base Fee is to ensure all public libraries pay an amount sustainable to the consortium. The Public Library Fee is based on what the library can afford based on “income” i.e. tax revenue.

- 1) Base Fee, based on 50% needed SWAN revenue from public libraries
- 2) Public Library Fee, based on Property Tax Income as a percentage of remaining 50% of needed SWAN revenue from public libraries. The amount of annual bond payments in non-operating debt service will be removed from the Property Tax Income amount.
- 3) LLSAP Grant Award Discount, based on the total amount of LLSAP funding divided by the count of public libraries in SWAN

The calculation for public libraries will change each fiscal year in SWAN depending on required revenue. The calculations below will change depending on the number of public libraries and the total property tax data.

FY26 Public Library Calculation Chart Example				
SWAN Budget Revenue Needed from Public Libraries \$3,196,800 Example Estimate	% Formula for SWAN Public Library	Total Amount of Revenue Needed per Calculation	Formula	Cost Per count
Base Consortium Fee (All public libraries pay)	50% of \$3,982,493 =	\$1,690,517	\$1,690,517 divided by 96 public libraries =	\$17,610 per library
Public Library Formula (Tax Revenue with Debt Service Removed)	50% of \$3,982,493 =	\$1,690,517	\$1,690,517 divided by \$202,073,947* in total tax revenue =	\$0.00837 per property tax dollars received
* \$202,073,946.95 is the total amount of taxes paid to public libraries in 2021.				

FY26 Public Library Example		
Base Fee (all public libraries pay)		\$17,610
Public Library Fee (based on county tax)	County tax paid to this library is \$1,269,009 X \$0.00837	\$10,370
LLSAP Grant Award Discount		(\$5,223)
Public Library Fee Total		\$23,003

County Property Tax Data

The formula uses property tax for what is collected, not what is levied. Each county treasurer provides the data online or an option to request this information via FOIA.

Cook County Tax Payments

Source: Cook Country Treasurer

Website: <https://www.cookcountytreasurer.com/freedomofinformationact.aspx>

Data collected: FOIA request for SWAN public libraries

DuPage County Tax Payments

Source: DuPage County Treasurer

Website: https://www.dupagecounty.gov/elected_officials/treasurer/

Data collected: Tax year payments distributed in calendar year

Kane County Tax Payments

Source: Kane County Treasurer

Website: <http://www.kanecountytreasurer.org/>

Data collected: Final Settlement Sheet Tax Year, Distribution Summary

Will County Tax Extension

Source: Will County Clerk

Website: <https://willcounty.gov/County-Offices/Finance-and-Revenue/Treasurer-Office/Taxing-Districts>

Data collected: Levy Statement of Account of Current Taxes Collected and Distributed.

Debt Service

Public libraries that have a non-operating debt service should submit the payment schedule to SWAN, such as a bond payment used for library facility renovation or construction. Reporting this debt schedule is the responsibility of the library, and any renegotiated debt should be reported, otherwise SWAN will use the amount reported prior. Libraries should submit the debt payment schedule to SWAN via the Support website at the link below.

[Bond Payment Submission Form](#)

LLSAP Funding Award

SWAN's status as an official LLSAP of RAILS results in State funding directed towards library resource sharing in Illinois. LLSAP funding is presented as a membership fee discount or an "award." The use of this LLSAP Funding Award within the fee chart allows SWAN libraries to have an idea of what membership fees would be without LLSAP funding (see the "No State Funding" column of the public library fee chart). The use of the LLSAP Funding Award within the chart highlights the contribution of State LLSAP funding and its value to each public library within SWAN.

Chart 1: SWAN Membership Fees
Fiscal Year 2025: July 1, 2024 - June 30, 2025
Draft SWAN Board

SWAN Library	Fee	State LLSAP Grant Discount	SWAN Fee Total	Prior Year Fee	Increase/ (Decrease)
Acorn Public Library District	\$ 28,226	(\$5,223)	\$ 23,003	\$ 22,441	\$562
Addison Public Library	\$ 66,193	(\$5,223)	\$ 60,970	\$ 60,589	\$381
Alsip-Merrionette Park Public Library District	\$ 43,169	(\$5,223)	\$ 37,946	\$ 37,844	\$102
Batavia Public Library District	\$ 58,277	(\$5,223)	\$ 53,054	\$ 51,741	\$1,313
Bedford Park Public Library District	\$ 32,240	(\$5,223)	\$ 27,017	\$ 25,371	\$1,646
Beecher Community Library District	\$ 20,470	(\$5,223)	\$ 15,248	\$ 14,954	\$293
Bellwood Public Library	\$ 35,733	(\$5,223)	\$ 30,510	\$ 27,239	\$3,271
Bensenville Community Public Library District	\$ 32,520	(\$5,223)	\$ 27,298	\$ 26,631	\$667
Bensenville Elementary School District #2	\$ 17,500		\$ 17,500	\$ 17,500	\$0
Berkeley Public Library	\$ 21,493	(\$5,223)	\$ 16,270	\$ 15,984	\$287
Berwyn Public Library	\$ 53,149	(\$5,223)	\$ 47,926	\$ 41,874	\$6,052
Bloomington Public Library	\$ 43,361	(\$5,223)	\$ 38,138	\$ 38,033	\$105
Blue Island Public Library	\$ 29,145	(\$5,223)	\$ 23,923	\$ 23,104	\$819
Bridgeview Public Library	\$ 26,879	(\$5,223)	\$ 21,656	\$ 21,754	(\$98)
Broadview Public Library District	\$ 26,615	(\$5,223)	\$ 21,392	\$ 22,993	(\$1,600)
Calumet City Public Library	\$ 30,371	(\$5,223)	\$ 25,148	\$ 25,715	(\$567)
Calumet Park Public Library	\$ 19,187	(\$5,223)	\$ 13,964	\$ 13,665	\$299
Carol Stream Public Library	\$ 47,545	(\$5,223)	\$ 42,322	\$ 42,419	(\$97)
Chicago Heights Public Library	\$ 24,424	(\$5,223)	\$ 19,202	\$ 19,178	\$24
Chicago Ridge Public Library	\$ 29,876	(\$5,223)	\$ 24,653	\$ 24,288	\$365
Cicero Public Library	\$ 33,102	(\$5,223)	\$ 27,879	\$ 28,344	(\$465)
Clarendon Hills Public Library	\$ 24,579	(\$5,223)	\$ 19,356	\$ 19,150	\$206
Crestwood Public Library District	\$ 23,333	(\$5,223)	\$ 18,110	\$ 17,422	\$688
Crete Public Library District	\$ 34,028	(\$5,223)	\$ 28,805	\$ 28,205	\$600
Dolton Public Library District	\$ 25,709	(\$5,223)	\$ 20,486	\$ 20,537	(\$51)
Downers Grove Public Library	\$ 67,107	(\$5,223)	\$ 61,884	\$ 62,929	(\$1,045)
Eisenhower Public Library District	\$ 53,521	(\$5,223)	\$ 48,298	\$ 47,153	\$1,145
Elmwood Park Public Library	\$ 32,196	(\$5,223)	\$ 26,973	\$ 26,785	\$188
Evergreen Park Public Library	\$ 29,102	(\$5,223)	\$ 23,880	\$ 23,468	\$411
Flossmoor Public Library	\$ 29,369	(\$5,223)	\$ 24,146	\$ 24,547	(\$401)
Forest Park Public Library	\$ 35,151	(\$5,223)	\$ 29,928	\$ 29,414	\$513
Frankfort Public Library District	\$ 41,284	(\$5,223)	\$ 36,061	\$ 34,855	\$1,207
Franklin Park Public Library District	\$ 34,548	(\$5,223)	\$ 29,325	\$ 27,868	\$1,457
Geneva Public Library District	\$ 64,615	(\$5,223)	\$ 59,392	\$ 58,613	\$779
Glen Ellyn Public Library	\$ 58,851	(\$5,223)	\$ 53,629	\$ 52,890	\$738
Glenside Public Library District	\$ 46,657	(\$5,223)	\$ 41,434	\$ 41,370	\$64
Glenwood-Lynwood Public Library District	\$ 30,427	(\$5,223)	\$ 25,204	\$ 25,458	(\$253)
Grande Prairie Public Library District	\$ 30,889	(\$5,223)	\$ 25,666	\$ 25,356	\$310
Green Hills Public Library District	\$ 40,121	(\$5,223)	\$ 34,898	\$ 34,145	\$753
Harvey Public Library District	\$ 26,274	(\$5,223)	\$ 21,051	\$ 20,613	\$439
Hillside Public Library	\$ 30,389	(\$5,223)	\$ 25,166	\$ 24,722	\$444
Hinsdale Public Library	\$ 44,611	(\$5,223)	\$ 39,388	\$ 38,940	\$448
Hodgkins Public Library District	\$ 23,389	(\$5,223)	\$ 18,166	\$ 18,009	\$156
Homewood Public Library District	\$ 38,937	(\$5,223)	\$ 33,714	\$ 33,325	\$390
Indian Prairie Public Library District	\$ 52,201	(\$5,223)	\$ 46,979	\$ 45,789	\$1,190
Itasca Community Library	\$ 32,083	(\$5,223)	\$ 26,860	\$ 26,554	\$306
Justice Public Library District	\$ 20,645	(\$5,223)	\$ 15,422	\$ 13,414	\$2,008
Kaneville Public Library District	\$ 18,401	(\$5,223)	\$ 13,179	\$ 12,851	\$327
La Grange Public Library	\$ 41,350	(\$5,223)	\$ 36,127	\$ 35,178	\$950
LaGrange Park Public Library District	\$ 33,937	(\$5,223)	\$ 28,714	\$ 28,014	\$700
Lansing Public Library	\$ 42,250	(\$5,223)	\$ 37,027	\$ 36,684	\$343
Linda Sokol Francis Brookfield Library	\$ 39,026	(\$5,223)	\$ 33,803	\$ 33,153	\$650
Lyons Public Library	\$ 23,983	(\$5,223)	\$ 18,761	\$ 18,445	\$316
Markham Public Library	\$ 23,283	(\$5,223)	\$ 18,060	\$ 17,982	\$78
Matteson Area Public Library District	\$ 41,742	(\$5,223)	\$ 36,519	\$ 35,767	\$752

Chart 1: SWAN Membership Fees
Fiscal Year 2025: July 1, 2024 - June 30, 2025
Draft SWAN Board

SWAN Library	Fee	State LLSAP Grant Discount	SWAN Fee Total	Prior Year Fee	Increase/ (Decrease)
Maywood Public Library District	\$ 29,758	(\$5,223)	\$ 24,535	\$ 24,197	\$338
McCook Public Library District	\$ 21,890	(\$5,223)	\$ 16,667	\$ 16,231	\$435
Melrose Park Public Library	\$ 25,767	(\$5,223)	\$ 20,544	\$ 20,561	(\$16)
Messenger Public Library of North Aurora	\$ 34,494	(\$5,223)	\$ 29,271	\$ 28,964	\$308
Midlothian Public Library	\$ 28,887	(\$5,223)	\$ 23,664	\$ 23,809	(\$146)
Morton Arboretum	\$ 12,500		\$ 12,500	\$ 12,500	\$0
Nancy L. McConathy Public Library District	\$ 20,510	(\$5,223)	\$ 15,287	\$ 15,026	\$261
National University of Health Sciences	\$ 11,000		\$ 11,000	\$ 11,000	\$0
North Riverside Public Library District	\$ 27,232	(\$5,223)	\$ 22,009	\$ 21,582	\$427
Northlake Public Library District	\$ 36,759	(\$5,223)	\$ 31,536	\$ 30,980	\$556
Oak Brook Public Library	\$ 27,170	(\$5,223)	\$ 21,947	\$ 21,973	(\$26)
Oak Lawn Public Library	\$ 65,351	(\$5,223)	\$ 60,128	\$ 57,813	\$2,315
Oak Park Public Library	\$ 104,529	(\$5,223)	\$ 99,306	\$ 98,246	\$1,060
Palos Heights Public Library	\$ 33,262	(\$5,223)	\$ 28,039	\$ 27,418	\$621
Palos Park Public Library	\$ 22,085	(\$5,223)	\$ 16,862	\$ 16,409	\$453
Park Forest Public Library	\$ 30,517	(\$5,223)	\$ 25,294	\$ 28,463	(\$3,169)
Prairie Trails Public Library District	\$ 35,629	(\$5,223)	\$ 30,406	\$ 29,744	\$662
Richton Park Public Library District	\$ 25,766	(\$5,223)	\$ 20,543	\$ 20,337	\$205
River Forest Public Library	\$ 30,365	(\$5,223)	\$ 25,142	\$ 24,436	\$706
River Grove Public Library District	\$ 21,985	(\$5,223)	\$ 16,762	\$ 16,328	\$435
Riverdale Public Library District	\$ 22,005	(\$5,223)	\$ 16,782	\$ 16,505	\$277
Riverside Public Library	\$ 29,137	(\$5,223)	\$ 23,914	\$ 23,423	\$491
Roselle Public Library District	\$ 36,773	(\$5,223)	\$ 31,550	\$ 31,014	\$536
Schiller Park Public Library	\$ 28,378	(\$5,223)	\$ 23,155	\$ 22,805	\$351
South Holland Public Library	\$ 37,535	(\$5,223)	\$ 32,313	\$ 32,121	\$191
St Charles Public Library District	\$ 89,322	(\$5,223)	\$ 84,099	\$ 82,902	\$1,198
Steger-South Chicago Heights Public Library District	\$ 21,551	(\$5,223)	\$ 16,328	\$ 14,789	\$1,538
Stickney-Forest View Public Library District	\$ 28,348	(\$5,223)	\$ 23,125	\$ 22,512	\$613
Sugar Grove Public Library District	\$ 23,716	(\$5,223)	\$ 18,493	\$ 18,061	\$432
Summit Public Library District	\$ 18,185	(\$5,223)	\$ 12,962	\$ 13,483	(\$521)
Theosophical Society in America	\$ 12,500		\$ 12,500	\$ 12,500	\$0
Thomas Ford Memorial Library	\$ 31,516	(\$5,223)	\$ 26,293	\$ 25,639	\$654
Thornton Public Library	\$ 19,027	(\$5,223)	\$ 13,804	\$ 13,466	\$338
Tinley Park Public Library	\$ 68,892	(\$5,223)	\$ 63,669	\$ 60,787	\$2,882
Town and Country Public Library District	\$ 30,784	(\$5,223)	\$ 25,561	\$ 24,827	\$735
University Park Public Library District	\$ 22,743	(\$5,223)	\$ 17,520	\$ 17,148	\$373
Villa Park Public Library	\$ 38,225	(\$5,223)	\$ 33,002	\$ 32,460	\$542
Warrenville Public Library District	\$ 34,354	(\$5,223)	\$ 29,131	\$ 28,225	\$906
West Chicago Public Library District	\$ 39,753	(\$5,223)	\$ 34,530	\$ 33,475	\$1,056
Westchester Public Library	\$ 29,178	(\$5,223)	\$ 23,955	\$ 23,875	\$80
Westmont Public Library	\$ 36,016	(\$5,223)	\$ 30,793	\$ 30,172	\$621
William Leonard Public Library District	\$ 19,677	(\$5,223)	\$ 14,454	\$ 14,165	\$289
Wood Dale Public Library District	\$ 40,985	(\$5,223)	\$ 35,762	\$ 35,141	\$621
Woodridge Public Library	\$ 51,867	(\$5,223)	\$ 46,644	\$ 45,917	\$727
Worth Public Library District	\$ 25,147	(\$5,223)	\$ 19,924	\$ 19,402	\$522

Chart 2: Public Library County Tax Payments

Library Name	Cook County Treasurer Tax Year 2022	DuPage County Treasurer Tax Year 2022	Kane County Treasurer Tax Year 2022	Will County County Treasurer Tax Year 2022	Total Tax Revenue Issued	Bond Amount 2021 (Removed)	Public Library Tax Revenue Total 2021	Prior year Tax Revenue	Tax revenue change
Acorn Public Library District	\$1,299,287.67				\$1,299,287.67	(\$30,278.00)	\$1,269,009.67	\$1,196,776.24	\$72,233.43
Addison Public Library		\$ 5,807,342.32			\$5,807,342.32	\$0.00	\$5,807,342.32	\$5,599,387.03	\$207,955.29
Alsip-Merrionette Park Public Library District	\$3,055,208.72				\$3,055,208.72	\$0.00	\$3,055,208.72	\$2,974,431.00	\$80,777.72
Batavia Public Library District			\$4,861,162.56		\$4,861,162.56	\$0.00	\$4,861,162.56	\$4,578,320.14	\$282,842.42
Bedford Park Public Library District	\$1,748,860.81				\$1,748,860.81	\$0.00	\$1,748,860.81	\$1,534,992.80	\$213,868.01
Beecher Community Library District				\$341,966.12	\$341,966.12	\$0.00	\$341,966.12	\$332,740.51	\$9,225.61
Bellwood Public Library	\$2,166,341.45				\$2,166,341.45	\$0.00	\$2,166,341.45	\$1,750,523.64	\$415,817.81
Bensenville Community Public Library District		\$ 1,782,359.09			\$1,782,359.09	\$0.00	\$1,782,359.09	\$1,680,326.81	\$102,032.28
Berkeley Public Library	\$464,203.00				\$464,203.00	\$0.00	\$464,203.00	\$451,558.71	\$12,644.29
Berwyn Public Library	\$4,248,191.73				\$4,248,191.73	\$0.00	\$4,248,191.73	\$3,439,563.27	\$808,628.46
Bloomington Public Library		\$ 3,078,139.27			\$3,078,139.27	\$0.00	\$3,078,139.27	\$2,996,267.24	\$81,872.03
Blue Island Public Library	\$1,378,933.29				\$1,378,933.29	\$0.00	\$1,378,933.29	\$1,273,323.40	\$105,609.89
Bridgeview Public Library	\$1,361,669.24				\$1,361,669.24	(\$253,650.00)	\$1,108,019.24	\$1,117,542.82	(\$9,523.58)
Broadview Public Library District	\$1,343,939.76				\$1,343,939.76	(\$267,455.00)	\$1,076,484.76	\$1,260,470.05	(\$183,985.29)
Brookfield Public Library	\$2,559,940.87				\$2,559,940.87	\$0.00	\$2,559,940.87	\$2,433,019.96	\$126,920.91
Calumet City Public Library	\$1,525,438.11				\$1,525,438.11	\$0.00	\$1,525,438.11	\$1,574,684.51	(\$49,246.40)
Calumet Park Public Library	\$188,515.49				\$188,515.49	\$0.00	\$188,515.49	\$183,956.23	\$4,559.26
Carol Stream Public Library		\$ 3,812,738.99			\$3,812,738.99	(\$234,461.00)	\$3,578,277.99	\$3,502,379.11	\$75,898.88
Chicago Heights Public Library	\$814,603.60				\$814,603.60	\$0.00	\$814,603.60	\$820,168.93	(\$5,565.33)
Chicago Ridge Public Library	\$1,466,281.72				\$1,466,281.72	\$0.00	\$1,466,281.72	\$1,409,974.31	\$56,307.41
Cicero Public Library	\$1,851,819.44				\$1,851,819.44	\$0.00	\$1,851,819.44	\$1,878,062.08	(\$26,242.64)
Clarendon Hills Public Library		\$ 833,054.03			\$833,054.03	\$0.00	\$833,054.03	\$816,940.66	\$16,113.37
Crestwood Public Library District	\$684,188.23				\$684,188.23	\$0.00	\$684,188.23	\$617,609.73	\$66,578.50
Crete Public Library District				\$1,962,545.63	\$1,962,545.63	\$0.00	\$1,962,545.63	\$1,862,000.88	\$100,544.75
Dolton Public Library District	\$968,199.86				\$968,199.86	\$0.00	\$968,199.86	\$977,094.05	(\$8,894.19)
Downers Grove Public Library		\$ 5,916,610.89			\$5,916,610.89	\$0.00	\$5,916,610.89	\$5,869,456.88	\$47,154.01
Eisenhower Public Library District	\$4,963,261.08				\$4,963,261.08	(\$670,671.00)	\$4,292,590.08	\$4,048,762.43	\$243,827.65
Elmwood Park Public Library	\$1,743,589.57				\$1,743,589.57	\$0.00	\$1,743,589.57	\$1,698,150.61	\$45,438.96
Evergreen Park Public Library	\$1,373,788.83				\$1,373,788.83	\$0.00	\$1,373,788.83	\$1,315,346.52	\$58,442.31
Flossmoor Public Library	\$1,405,656.26				\$1,405,656.26	\$0.00	\$1,405,656.26	\$1,439,855.84	(\$34,199.58)
Forest Park Public Library	\$2,096,754.75				\$2,096,754.75	\$0.00	\$2,096,754.75	\$2,001,577.95	\$95,176.80
Frankfort Public Library District	\$30,927.45			\$2,799,008.77	\$2,829,936.22	\$0.00	\$2,829,936.22	\$2,629,473.04	\$200,463.18
Franklin Park Public Library District	\$2,024,699.57				\$2,024,699.57	\$0.00	\$2,024,699.57	\$1,823,075.35	\$201,624.22
Geneva Public Library District			\$7,195,283.78		\$7,195,283.78	(\$1,576,546.26)	\$5,618,737.52	\$5,371,330.73	\$247,406.79
Glen Ellyn Public Library		\$ 4,929,803.34			\$4,929,803.34	\$0.00	\$4,929,803.34	\$4,710,924.74	\$218,878.60
Glenside Public Library District		\$ 3,844,285.32			\$3,844,285.32	(\$372,115.02)	\$3,472,170.30	\$3,381,390.44	\$90,779.86
Glenwood-Lynwood Public Library District	\$1,982,769.20				\$1,982,769.20	(\$450,612.50)	\$1,532,156.70	\$1,544,964.08	(\$12,807.38)
Grande Prairie Public Library District	\$1,587,344.63				\$1,587,344.63	\$0.00	\$1,587,344.63	\$1,533,267.14	\$54,077.49
Green Hills Public Library District	\$3,080,855.47				\$3,080,855.47	(\$390,000.00)	\$2,690,855.47	\$2,547,527.85	\$143,327.62
Harvey Public Library District	\$1,035,728.61				\$1,035,728.61	\$0.00	\$1,035,728.61	\$985,803.01	\$49,925.60
Hillside Public Library	\$1,527,540.33				\$1,527,540.33	\$0.00	\$1,527,540.33	\$1,460,082.85	\$67,457.48
Hinsdale Public Library	\$462,669.56	\$ 3,017,843.74			\$3,480,513.30	(\$252,912.00)	\$3,227,601.30	\$3,100,922.96	\$126,678.34
Hodgkins Public Library District	\$690,785.65				\$690,785.65	\$0.00	\$690,785.65	\$685,337.37	\$5,448.28
Homewood Public Library District	\$2,549,377.36				\$2,549,377.36	\$0.00	\$2,549,377.36	\$2,452,878.73	\$96,498.63
Indian Prairie Public Library District	\$256,021.01	\$ 3,878,871.55			\$4,134,892.56	\$0.00	\$4,134,892.56	\$3,891,335.28	\$243,557.28

Chart 2: Public Library County Tax Payments

Library Name	Cook County Treasurer Tax Year 2022	DuPage County Treasurer Tax Year 2022	Kane County Treasurer Tax Year 2022	Will County County Treasurer Tax Year 2022	Total Tax Revenue Issued	Bond Amount 2021 (Removed)	Public Library Tax Revenue Total 2021	Prior year Tax Revenue	Tax revenue change
Itasca Community Library		\$ 1,730,052.08			\$1,730,052.08	\$0.00	\$1,730,052.08	\$1,671,464.19	\$58,587.89
Justice Public Library District	\$362,795.71				\$362,795.71	\$0.00	\$362,795.71	\$154,987.45	\$207,808.26
Kaneville Public Library District			\$94,654.53		\$94,654.53	\$0.00	\$94,654.53	\$90,087.33	\$4,567.20
La Grange Public Library	\$3,464,344.58				\$3,464,344.58	(\$626,550.00)	\$2,837,794.58	\$2,666,707.16	\$171,087.42
LaGrange Park Public Library District	\$2,103,215.74				\$2,103,215.74	(\$151,525.00)	\$1,951,690.74	\$1,839,937.97	\$111,752.77
Lansing Public Library	\$3,129,011.21				\$3,129,011.21	(\$183,700.00)	\$2,945,311.21	\$2,840,555.58	\$104,755.63
Lyons Public Library	\$776,894.25				\$776,894.25	(\$15,000.00)	\$761,894.25	\$735,618.69	\$26,275.56
Markham Public Library	\$771,294.13				\$771,294.13	(\$93,150.00)	\$678,144.13	\$682,138.82	(\$3,994.69)
Matteson Area Public Library District	\$2,884,649.41				\$2,884,649.41	\$0.00	\$2,884,649.41	\$2,734,733.96	\$149,915.45
Maywood Public Library District	\$1,452,141.73				\$1,452,141.73	\$0.00	\$1,452,141.73	\$1,399,493.91	\$52,647.82
McCook Public Library District	\$673,905.61				\$673,905.61	(\$162,285.00)	\$511,620.61	\$480,160.66	\$31,459.95
Melrose Park Public Library	\$975,115.55				\$975,115.55	\$0.00	\$975,115.55	\$979,806.22	(\$4,690.67)
Messenger Public Library of North Aurora			\$2,018,305.10		\$2,018,305.10	\$0.00	\$2,018,305.10	\$1,949,599.16	\$68,705.94
Midlothian Public Library	\$1,587,299.14				\$1,587,299.14	(\$239,294.50)	\$1,348,004.64	\$1,354,724.53	(\$6,719.89)
Nancy L. McConathy Public Library District	\$345,694.75			\$1,005.48	\$346,700.23	\$0.00	\$346,700.23	\$341,052.43	\$5,647.80
North Riverside Public Library District	\$1,150,236.54				\$1,150,236.54	\$0.00	\$1,150,236.54	\$1,097,685.66	\$52,550.88
Northlake Public Library District	\$3,011,419.60				\$3,011,419.60	(\$722,425.00)	\$2,288,994.60	\$2,182,321.76	\$106,672.84
Oak Brook Public Library		\$ 1,142,808.00			\$1,142,808.00	\$0.00	\$1,142,808.00	\$1,142,808.00	\$0.00
Oak Lawn Public Library	\$5,706,720.30				\$5,706,720.30	\$0.00	\$5,706,720.30	\$5,279,076.68	\$427,643.62
Oak Park Public Library	\$10,389,827.72				\$10,389,827.72	\$0.00	\$10,389,827.72	\$9,945,372.10	\$444,455.62
Palos Heights Public Library	\$1,870,990.57				\$1,870,990.57	\$0.00	\$1,870,990.57	\$1,771,174.47	\$99,816.10
Palos Park Public Library	\$534,963.75				\$534,963.75	\$0.00	\$534,963.75	\$500,671.23	\$34,292.52
Park Forest Public Library	\$1,240,598.33			\$302,220.23	\$1,542,818.56	\$0.00	\$1,542,818.56	\$1,891,805.31	(\$348,986.75)
Prairie Trails Public Library District	\$2,153,914.87				\$2,153,914.87	\$0.00	\$2,153,914.87	\$2,039,650.27	\$114,264.60
Richton Park Public Library District	\$1,396,100.94				\$1,396,100.94	(\$421,162.50)	\$974,938.44	\$954,025.06	\$20,913.38
River Forest Public Library	\$1,524,716.53				\$1,524,716.53	\$0.00	\$1,524,716.53	\$1,427,021.25	\$97,695.28
River Grove Public Library District	\$523,030.45				\$523,030.45	\$0.00	\$523,030.45	\$491,254.24	\$31,776.21
Riverdale Public Library District	\$525,401.85				\$525,401.85	\$0.00	\$525,401.85	\$511,752.87	
Riverside Public Library	\$1,377,871.02				\$1,377,871.02	\$0.00	\$1,377,871.02	\$1,310,107.53	\$67,763.49
Roselle Public Library District	\$241,828.61	\$ 2,048,853.86			\$2,290,682.47	\$0.00	\$2,290,682.47	\$2,186,223.10	\$104,459.37
Schiller Park Public Library	\$1,287,222.46				\$1,287,222.46	\$0.00	\$1,287,222.46	\$1,238,753.29	\$48,469.17
South Holland Public Library	\$2,381,813.27				\$2,381,813.27	\$0.00	\$2,381,813.27	\$2,313,987.74	\$67,825.53
St Charles Public Library District		\$ 591,644.94	\$7,980,451.94		\$8,572,096.88	\$0.00	\$8,572,096.88	\$8,174,462.80	\$397,634.08
Steger-South Chicago Heights Public Library District	\$285,721.51			\$185,366.22	\$471,087.73	\$0.00	\$471,087.73	\$313,740.62	\$157,347.11
Stickney-Forest View Public Library District	\$1,425,755.45				\$1,425,755.45	(\$142,150.00)	\$1,283,605.45	\$1,204,954.38	\$78,651.07
Sugar Grove Public Library District			\$1,569,338.04		\$1,569,338.04	(\$839,450.00)	\$729,888.04	\$691,278.64	\$38,609.40
Summit Public Library District	\$384,215.98				\$384,215.98	(\$315,487.00)	\$68,728.98	\$162,920.00	(\$94,191.02)
Thomas Ford Memorial Library	\$1,901,495.71				\$1,901,495.71	(\$239,200.00)	\$1,662,295.71	\$1,565,914.78	\$96,380.93
Thornton Public Library	\$169,462.88				\$169,462.88	\$0.00	\$169,462.88	\$161,018.80	\$8,444.08
Tinley Park Public Library	\$4,534,738.55			\$1,595,252.66	\$6,129,991.21	\$0.00	\$6,129,991.21	\$5,622,231.51	\$507,759.70
Town and Country Public Library District			\$1,574,800.80		\$1,574,800.80	\$0.00	\$1,574,800.80	\$1,472,117.92	\$102,682.88
University Park Public Library District	\$11,884.40			\$601,775.80	\$613,660.20	\$0.00	\$613,660.20	\$585,905.35	\$27,754.85
Villa Park Public Library		\$ 3,306,462.37			\$3,306,462.37	(\$842,250.00)	\$2,464,212.37	\$2,353,033.56	\$111,178.81
Warrenville Public Library District		\$ 2,168,189.62			\$2,168,189.62	(\$166,666.00)	\$2,001,523.62	\$1,864,357.45	\$137,166.17
West Chicago Public Library District		\$ 2,646,931.25			\$2,646,931.25	\$0.00	\$2,646,931.25	\$2,470,197.10	\$176,734.15

Chart 2: Public Library County Tax Payments

Library Name	Cook County Treasurer Tax Year 2022	DuPage County Treasurer Tax Year 2022	Kane County Treasurer Tax Year 2022	Will County County Treasurer Tax Year 2022	Total Tax Revenue Issued	Bond Amount 2021 (Removed)	Public Library Tax Revenue Total 2021	Prior year Tax Revenue	Tax revenue change
Westchester Public Library	\$1,382,761.67				\$1,382,761.67	\$0.00	\$1,382,761.67	\$1,362,299.68	\$20,461.99
Westmont Public Library		\$ 2,200,186.15			\$2,200,186.15	\$0.00	\$2,200,186.15	\$2,089,032.98	\$111,153.17
William Leonard Public Library District	\$247,119.95				\$247,119.95	\$0.00	\$247,119.95	\$241,671.21	\$5,448.74
Wood Dale Public Library District		\$ 2,794,173.72			\$2,794,173.72	\$0.00	\$2,794,173.72	\$2,662,532.62	\$131,641.10
Woodridge Public Library		\$ 3,834,457.97		\$260,506.53	\$4,094,964.50	\$0.00	\$4,094,964.50	\$3,906,129.82	\$188,834.68
Worth Public Library District	\$900,923.00				\$900,923.00	\$0.00	\$900,923.00	\$846,067.82	\$54,855.18

Chart 3: Public Library Bond Amounts Reported

Public Library	Bond Amt for FY26 Fee Formula (2022)	Annual Debt Service 2023	Annual Debt Service 2024	Annual Debt Service 2025	Annual Debt Service 2026	Annual Debt Service 2027	Annual Debt Service 2028
Acorn Public Library District	\$ 30,278	\$ 30,398.00	\$ 30,478.00	\$ 29,518.00	\$ 29,558.00	\$ 29,483.00	\$ 29,365.00
Addison Public Library							
Alsip-Merrionette Park Public Library District							
Batavia Public Library District							
Bedford Park Public Library District							
Beecher Community Library District							
Bellwood Public Library							
Bensenville Community Public Library District							
Berkeley Public Library							
Berwyn Public Library							
Bloomington Public Library							
Blue Island Public Library							
Bridgeview Public Library	\$ 253,650	\$ 255,250.00	\$ 258,650.00	\$ 256,750.00	\$ 254,700.00	\$ 257,500.00	
Broadview Public Library District	\$ 267,455	\$ 267,872.50	\$ 268,172.50	\$ 272,842.50	\$ 272,252.50	\$ 270,652.50	\$ 268,902.50
Brookfield Public Library							
Calumet City Public Library							
Calumet Park Public Library							
Carol Stream Public Library	\$ 234,461	\$ 234,461.00	\$ 234,461.00	\$ 234,461.00	\$ 234,461.00	\$ 234,461.00	
Chicago Heights Public Library							
Chicago Ridge Public Library							
Cicero Public Library							
Clarendon Hills Public Library							
Crestwood Public Library District							
Crete Public Library District							
Dolton Public Library District							
Downers Grove Public Library							
Eisenhower Public Library District	\$ 670,671	\$ 672,103.00	\$ 693,519.00	\$ 669,144.00	\$ 667,968.00	\$ 671,616.00	
Elmwood Park Public Library							
Evergreen Park Public Library							
Flossmoor Public Library							
Forest Park Public Library							
Frankfort Public Library District							
Franklin Park Public Library District							
Geneva Public Library District	\$ 1,576,546	\$ 1,580,946.26	\$ 1,588,471.26	\$ 1,598,821.26	\$ 1,599,921.26	\$ 1,606,646.26	\$ 1,610,821.26
Glen Ellyn Public Library							
Glenside Public Library District	\$ 372,115	\$ 365,565.02	\$ 368,595.02	\$ 365,987.52	\$ 362,918.77	\$ 374,015.63	\$ 359,140.63
Glenwood-Lynwood Public Library District	\$ 450,613	\$ 455,375.00	\$ 453,825.00	\$ 455,225.00	\$ 451,025.00	\$ 456,425.00	\$ 451,025.00
Grande Prairie Public Library District							
Green Hills Public Library District	\$ 390,000	\$ 405,000.00	\$ 150,000.00				
Harvey Public Library District							
Hillside Public Library							
Hinsdale Public Library	\$ 252,912	\$ 268,512.00	\$ 268,712.00	\$ 283,812.00	\$ 293,114.00	\$ 296,816.00	
Hodgkins Public Library District							
Homewood Public Library District							
Indian Prairie Public Library District							
Itasca Community Library							
Justice Public Library District							
Kaneville Public Library District							

Chart 3: Public Library Bond Amounts Reported

Public Library	Bond Amt for FY26 Fee						
	Formula (2022)	Annual Debt Service 2023	Annual Debt Service 2024	Annual Debt Service 2025	Annual Debt Service 2026	Annual Debt Service 2027	Annual Debt Service 2028
La Grange Public Library	\$ 626,550	\$ 624,750.00	\$ 612,750.00				
LaGrange Park Public Library District	\$ 151,525	\$ 147,150.00	\$ 152,438.00				
Lansing Public Library	\$ 183,700						
Lyons Public Library	\$ 15,000	\$ 15,000.00	\$ 15,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00	\$ 20,000.00
Markham Public Library	\$ 93,150	\$ 1,320,075.00	\$ 27,000.00	\$ 613,500.00			
Matteson Area Public Library District							
Maywood Public Library District							
McCook Public Library District	\$ 162,285						
Melrose Park Public Library							
Messenger Public Library of North Aurora							
Midlothian Public Library	\$ 239,295	\$ 245,802.50	\$ 251,907.50	\$ 252,607.50	\$ 247,974.50	\$ 193,095.50	\$ 189,236.00
Nancy L. McConathy Public Library District							
North Riverside Public Library District							
Northlake Public Library District	\$ 722,425	\$ 722,775.00	\$ 714,150.00				
Oak Brook Public Library							
Oak Lawn Public Library							
Oak Park Public Library							
Palos Heights Public Library							
Palos Park Public Library							
Park Forest Public Library							
Prairie Trails Public Library District							
Richton Park Public Library District	\$ 421,163	\$ 423,050.00	\$ 418,900.00	\$ 419,600.00	\$ 423,400.00	\$ 420,000.00	\$ 421,200.00
River Forest Public Library							
River Grove Public Library District							
Riverdale Public Library District							
Riverside Public Library							
Roselle Public Library District							
Schiller Park Public Library							
South Holland Public Library							
St Charles Public Library District							
Steger-South Chicago Heights Public Library District							
Stickney-Forest View Public Library District	\$ 142,150	\$ 139,650.00	\$ 142,150.00	\$ 143,250.00	\$ 144,200.00		
Sugar Grove Public Library District	\$ 839,450						
Summit Public Library District	\$ 315,487						
Thomas Ford Memorial Library	\$ 239,200	\$ 239,200.00	\$ 236,600.00	\$ 233,800.00	\$ 230,800.00	\$ 232,600.00	\$ 234,000.00
Thornton Public Library							
Tinley Park Public Library							
Town and Country Public Library District							
University Park Public Library District							
Villa Park Public Library	\$ 842,250	\$ 833,650.00	\$ 834,650.00	\$ 834,850.00	\$ 839,250.00	\$ 834,850.00	\$ 834,550.00
Warrenville Public Library District	\$ 166,666	\$168,830.25	\$170,895.00	\$167,875.25	\$171,741.00	\$173,507.25	\$175,174.00
West Chicago Public Library District							
Westchester Public Library							
Westmont Public Library							
William Leonard Public Library District							
Wood Dale Public Library District							
Woodridge Public Library							

Chart 3: Public Library Bond Amounts Reported

Public Library	Bond Amt for FY26 Fee Formula (2022)	Annual Debt Service 2023	Annual Debt Service 2024	Annual Debt Service 2025	Annual Debt Service 2026	Annual Debt Service 2027	Annual Debt Service 2028
Worth Public Library District							

Chart 4: Academic, School, Special Library Fees

Academic Libraries

- 1) Student Population, rounded to nearest 1,000 * 2 [Fall IBHE profile]
- 2) Title Count rounded to nearest 1,000 / 3

	Population	Item Count	Pop Fee	Item/Title Fee	FY25 Total
National University of Health Sciences	495	27,478	\$ 2,000	\$ 9,000	\$ 11,000

School Libraries

- 1) Student Population, rounded to nearest 1000 * 5 [Illinois Report Card data]
- 2) Building Location/Branch Fee \$2,500 per building

	Population	Buildings	Pop Fee	Building Fee	FY25 Total
Bensenville School District #2	2,022	3	\$ 10,000	\$ 7,500	\$ 17,500

Special Libraries

- 1) Title Fee (Tier 1 <10,000 \$7,500; Tier 2 <40,000 \$10,000; Tier 3 > 40,000 \$12,500)
- 2) Building Location/Branch Fee \$2,500 per building

	Buildings	Title Count	Building Fee	Title Fee	FY25 Total
Morton Arboretum	1	23,747	\$ 2,500	\$ 10,000	\$ 12,500
The Theosophical Society in America	1	29,485	\$ 2,500	\$ 10,000	\$ 12,500

Membership Satisfaction with SWAN Platform: 2025 introduction & survey

Aaron Skog

January 21, 2025

I have drafted an introduction to the membership satisfaction survey of the SWAN platform for 2025.

The wording of the inaugural survey included a statement about the SirsiDynix contact. I have left that section out for a proposed introduction to the survey. I instead have included “of interest” in feedback on the Aspen mobile app.

SWAN could have the survey open from Monday, February 24 through Friday, March 14, 2025.

Survey Title & Introduction

Membership Satisfaction with SWAN Platform (closing 3/14, one submission per library)

Dear SWAN Library Directors,

To obtain valuable and meaningful feedback from directors and front-line staff in SWAN libraries, this survey is being conducted to help gauge your satisfaction with the following products used by SWAN.

The intention of this satisfaction survey is to gather your feedback. Moving forward, this will be done annually, and the results will be reviewed by the SWAN Board and leadership.

Of interest for this year’s survey is the inclusion of SWAN’s Library + mobile app (LiDA: Library Aspen Discovery app). We have now had the mobile app for an entire year and obtaining your feedback is an important step for the 2025 survey.

~~Of interest for this year’s survey is the renewal of the SirsiDynix agreement. While it is too late to consider not renewing our upcoming SirsiDynix contract for at least one more year (this is slated for renewal May 1, 2024), the SWAN Board and administration hope to use the feedback obtained here as leverage to negotiate timely future product improvements, to provide further training to current SWAN library staff members, and/or to consider other product options in the future.~~

The other products listed here include those that are Symphony WorkFlows, BLUEcloud Analytics, MessageBee, and Aspen Discovery. We have included the Illinois State Library OCLC WorldShare as well (which includes WorldCat, WorldShare ILL, etc.). Your feedback will help guide SWAN with assessing the satisfaction of these products currently under contract.

In preparation to answer this survey, please reach out to your front-line staff for specific issues you have with the below-listed products. Where appropriate, please collect screenshots and any remedies you have attempted to solve problems. To keep results manageable, we are allowing only one response per library. Feel free to designate someone other than yourself to complete the survey.

Survey questions updated for 2025

Below are screenshots of the survey that is currently not open for viewing by membership. The survey ratings was updated to include LiDA.

Satisfaction Rating



Please rate your satisfaction with the listed products.

Please rate your satisfaction with each of the following products*

[Response required]

	Dissatisfied	Somewhat satisfied	Satisfied	No basis for judgement
WorkFlows* Staff client from SirsiDynix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
BLUEcloud Analytics* Data analysis and reporting from SirsiDynix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MobileCirc/MobileStaff* Staff tablet-based app from SirsiDynix	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
LiDA* Library Discovery App, aka SWAN Libraries + mobile application	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Aspen Discovery* SWAN OPAC supported and developed with ByWater Solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MessageBee* Notification platform with Unique Management Solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WorldShare ILL & WorldCat Discovery* OCLC group-services for Illinois libraries, managed by SWAN	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your comments on the rating

[Optional]

Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? *

[Response required]

	1	2	3	4	5	6	7	8	9	10
Rank 1 to 10*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Rank 1 Not well, Rank 10 Extremely well										

Your comments on the overall experience rating

[Optional]

Written feedback

Please provide written feedback on your selections. This is optional, but it will help us understand the your rating. If you would like to provide additional examples of screen captures, images, or documents, this form has the ability to upload them.

For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.

For the products for which you indicated dissatisfaction, please provide detailed feedback on which features of which products you find problematic. Where appropriate, please attach screenshots and share attempted solutions.

Upload file

One file only.
100 MB limit.
Allowed types: gif, jpg, jpeg, png, doc, docx.

Choose File No file chosen

Optionally include a screenshot, document, or photo of the issue. Only a single file can be uploaded, so if multiple examples are required, please incorporate those into a single document, e.g., Word.

Your name & library

Name

(user logged in)

Aaron Skog ⋮

Library

SWAN

Your email

aaron@swanlibraries.net

Submit

SWAN Training Strategy

January 2025

SWAN training empowers library staff and patrons to make the most of the SWAN library services platform, through both consortium-specific and vendor provided trainings in a variety of formats.

This document outlines the strategy for SWAN employees to create, deliver, and maintain trainings that serve our member libraries.

Principles

Trainings are timely

We strive to provide trainings that are current, providing instruction on the most current versions of software, policies, and procedures. We regularly audit our in-house developed trainings for accuracy. We review update dates for in-house and vendor provided trainings, striving for trainings no more than 5 years old.

Trainings are high quality and useful to the membership

We evaluate the trainings offered to the SWAN membership through usage metrics, such as views and course completions for online courses; ratings; and surveys.

Trainings are findable and clearly communicated

All SWAN trainings are presented and searchable through the SWAN support site, in addition to being findable across the platform(s) that house them.

Trainings are built around library staff use cases

In-house developed trainings use real-life scenarios, created in partnership with SWAN member library staff and user groups.

Trainings follow best practices

SWAN creates trainings based on best practices in instructional design for professional development, utilizing instructional design models such as Action Mapping and Universal Design for Learning (UDL).

Sources and scope

SWAN trainings may be developed in-house, or supplied from a SWAN platform vendor.

In-house trainings

SWAN develops in-house training on the SWAN platform and best practices where SWAN practice and configuration is inherently tied to the platform experience, for example, Aspen or Circulation training.

Vendor provided trainings

We also recommend vendor-provided trainings for situations where usage is not directly influenced by application within SWAN; for example, OCLC training.

Out-of-scope

Trainings that are out of scope include:

- Full Level Cataloging
- Materials Processing
- Public service programming
- Web & software development
- Hardware & software that are outside of the SWAN platform
- New hire training

Audiences

Library staff

SWAN provides training for member library staff across a variety of disciplines, skill levels, and goals. (Something about scope)

Patrons

In most cases, member libraries provide training to their patrons directly. SWAN may provide some training on patron-facing areas of the SWAN platform, if there is a need SWAN is best positioned to fulfill.

Types of training

Online Courses & Classes

SWAN online courses and classes are scripted and designed to meet the training needs of the membership as a whole. They are regularly evaluated and updated through an annual review process. This type of training includes:

- Pre-recorded webinars
- Self-paced online courses and classes through the online learning management system (LMS)

Training Events

Training events are live, hands-on or interactive sessions that may be in-person or online. These events are typically not recorded and therefore have no long term maintenance needs. Examples of these types of events include:

- Pre-cat trainings
- SWAN Expo
- User group sponsored training events

Member Updates

Member updates are timely communications and demos that are related to consortium news and new features. These may be recorded, but recordings are made available for a limited period of time and are not maintained long term. Examples include:

- Release updates
- Fireside chats
- New product demos

Consultations

Consultations are conducted one on one or with one library at the time of need. These are typically not recorded.

- In-service days
- On-site visits
- Zoom consults

Training and curriculum development

SWAN uses the following process in developing new trainings and expanding our training curriculum.

1. Identify training requirements

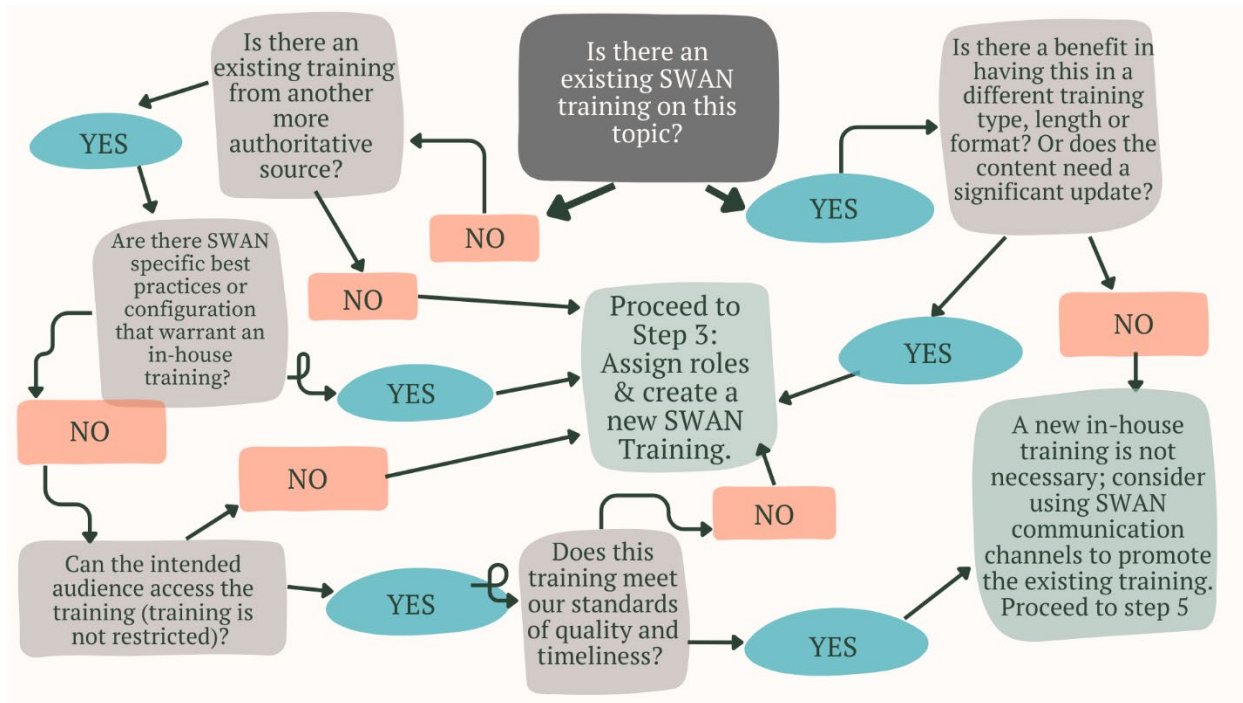
Before proceeding, all of these requirements should be in place and formed into a user story.

As a (audience) I (need) so I can (goal).

- a. Define the need - what is the problem to be solved, and does training best solve the problem?
 - i. Ex: Patrons with lost cards find old card and want to staff to reinstate the old number. Staff try to do it, but it won't work.
- b. Define the topic – is this topic within the scope of SWAN training?
 - i. Ex: Library staff need to understand the steps in how to use the Lost Card Manager Helper.
- c. Define the audience – who is experiencing this problem?
 - i. Ex: Library circulation staff
- d. Define the goal – what does the audience need to do?
 - i. Ex: Library circulation staff can reinstate the patron's old library card number using the User Id Manger Helper.

2. Match the requirements to a source

Determine if a new in-house training is needed, or if there are existing resources that could better fulfill the training requirements. As a general rule of thumb, we create in-house trainings only when another, more authoritative source does not exist or does not fully meet our needs.



3. Assign project roles

If we create an in-house training or find a vendor training to share, we need to establish who will be responsible for the training.

Role	Description	Example
Responsible	Develop and publish the training products, deliver the in-person training, or share the vendor training	Training and Development Consultant will publish a new Holds Management training in the LMS
Accountable	SWAN manager responsible for ensuring training is developed	UX Manager will have checkins and reviews of drafts

Role	Description	Example
Consulted	SMEs involved in the training development process	Bibliographic Services Consultants, ITSS Consultants, Circulation Working Group will consult with the Training and Development Consultant
Informed	Informed that the training is in progress and/or published; define a communication plan using SWAN communication channels, as defined in the SWAN content strategy.	SWAN membership through Fireside Chat, SWAN newsletter, and the Circulation Networking meeting

4. Develop the training

If a new in-house training is needed, proceed with the following steps. If not, continue to step 5.

- a. Develop an outline and save in the designated location.
 - i. Feedback from SMEs
 - ii. Accountable person approves.
- b. Design and build the training, with rounds of feedback and iteration
- c. (Online only) Review the training for publication – Accountable person approves.

5. Deliver the training

- a. Vendor provided training
 - i. Link or add to SWAN website(s) as defined in the Content Strategy.
 - ii. Promote the new training based on the Informed role as defined in step 3.
- b. Online courses and classes
 - i. Upload the course and any accompanying materials to the appropriate platform.
 - ii. Link or add to SWAN website(s) as defined in the Content Strategy.
 - iii. Promote the new training based on the Informed role as defined in step 3.
- c. Training events
 - i. Deliver the training at the event

6. Evaluate and conclude

- a. Vendor provided training

- i. Monitor usage through website analytics
 - b. Training events
 - i. Write up a summary report following the event
 - ii. Provide the designated training survey to participants
 - c. Online courses and classes
 - i. Monitor usage through website analytics
 - ii. Solicit feedback through surveys
7. Maintain, retire, or refine
 - a. Vendor provided training
 - i. Complete an annual review
 - b. Online courses and classes
 - i. Complete an annual review

Responsibilities

The following positions within SWAN have specific responsibilities to carry out the SWAN Training Strategy.

Training and Development Consultant

The Training and Development Consultant coordinates the development and assessment of trainings. This role collaborates closely with SWAN consultants and management team to:

- Coordinate in-person trainings and the development of new online trainings.
- Lead the development of online self-paced courses.
- Assess trainings through qualitative and quantitative measures.
- Share best practices and methods for instructional design.
- Conduct regular audits of online trainings for quality and accuracy.

Executive Director

The SWAN Executive Director is responsible for carrying out the SWAN mission, vision, and strategic plan and approving the training strategy. They also ensure the training infrastructure and professional development needs have long-term support.

Assistant Director

The SWAN Assistant Director is responsible for carrying out the training strategy; coordinating the assignment of training roles and responsibilities; and ensuring that yearly goals for training delivery and timelines are completed. The Assistant Director also

identifies professional development needs and opportunities for all SWAN staff involved in creating and delivering training.

User Experience Manager

The SWAN User Experience Manager is responsible for the SWAN Content Strategy and ensuring that the interfaces used to deliver trainings are useful, usable, findable, and accessible for their intended audiences. The UX Manager also works closely with the Training and Development Consultant and Assistant Director to set yearly training and professional development goals.

Managers

The SWAN Management Team is responsible for supporting and applying the training strategy within their departments and topic areas. Managers are expected to:

- Support consultants and team members in carrying out the training strategy, allotting staff time and resources for site visits, training design, and training review.
- Identify training needs within the membership.
- Provide feedback on course outlines and published courses.

Consultants

SWAN consultants are subject matter experts. They may advise each other and the Training and Development Consultant during the training design process, or they may directly create training. They are expected to:

- Work with the Training and Development Consultant to plan and deliver training according to the training strategy.
- Participate in regular training audits.
- Provide in-person and online consultations.

User Groups

SWAN user groups are comprised of subject matter experts from member libraries. These groups may provide feedback on course outlines and courses, and they assist in the development of training scenarios.

Resources

Moore, C. (2017). Map it : the hands-on guide to strategic training design. Montesa Press.

“The RACI Model.” RACI Charts, <https://racichart.org>, January 9, 2025.