

SWAN BOARD MEETING AGENDA

March 21, 2025 9:30 a.m.

**Roselle Public Library District
40 South Park Street
Roselle, IL 60172-2020**

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

Public comment is allowed at SWAN meetings

3. Action Item – Acceptance of the March 21, 2025 SWAN Board Meeting Agenda

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE MARCH 21, 2025 SWAN BOARD MEETING AGENDA AS PRESENTED

4. Action Item – Approval of SWAN Financials, February 2025 (Exhibit pgs. 3-14)
 - a. Balance sheet and detail of expenditures for February 2025
 - b. Approval of the payment of bills for February 1, 2025, through February 28, 2025 in the amount of \$52,119.63

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR FEBRUARY 1 THROUGH FEBRUARY 28, 2025 AND ACCEPTS THE BALANCE SHEET AND DETAIL OF EXPENDITURES FOR FEBRUARY 2025

5. Action Item – Acceptance of the February 21, 2025, SWAN Board Meeting Minutes (Exhibit pgs. 15-17)

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE FEBRUARY 21, 2025 SWAN BOARD MEETING MINUTES AS PRESENTED

6. Reports
 - a. Board President Report
 - b. Executive Director Report (Exhibit pgs. 18-21)
 - c. Operations Report (Exhibit pgs. 22-35)
 - d. Treasurer Report

e. Board Calendar (Exhibit pgs. 36-37)

7. Discussion—SWAN 2025 projects overview (Exhibit pgs. 38-47)

8. Discussion—Platform satisfaction survey 2025 responses (Exhibit pgs. 48-147)

9. 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 February 28, 2025

	<u>Balance End of Month</u>
ASSETS	
Cash and Cash Equivalents	
Hinsdale Bank - Operating - 2176	394,584.78
Hinsdale Bank - MM - 5010	2,143,605.48
IMET Funds	364,460.83
Propay Funds	<u>42.86</u>
Total Cash and Cash Equivalents	<u>\$ 2,902,693.95</u>
Current Assets	
Accounts Receivable	153,588.05
REINT Receivable	-
Other Receivables	-
Deposits	<u>23,467.08</u>
Total Current Assets	<u>\$ 177,055.13</u>
Capital Assets, net	
Building and Improvements	6,895.00
Equipment	36,500.50
Computers	324,383.36
Accumulated Depreciation	<u>(353,549.65)</u>
Total Capital Assets, net	<u>\$ 14,229.21</u>
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	<u>(1,338,020.80)</u>
Total Other Assets	<u>\$ 624,039.76</u>
Total Assets	<u>\$ 3,718,018.05</u>
LIABILITIES	
Current Liabilities	
Library Consortia Special Interest Group Funds	6,249.46
Accrued Payroll	57,702.49
Compensated Absences	<u>122,929.42</u>
Total Current Liabilities	<u>\$ 186,881.37</u>
Long Term Liabilities	
Lease Liability - Right to Use Asset	35,466.58
Subscription Liability	230,629.50
Accrued Interest Liability - SBITA	<u>6,659.48</u>
Total Long Term Liabilities	<u>\$ 272,755.56</u>
Total Liabilities	<u>\$ 459,636.93</u>
FUND BALANCE	
Beginning Net Assets	
Unrestricted	<u>2,893,173.82</u>
Total Beginning Net Assets	<u>\$ 2,893,173.82</u>
Current YTD Net Income	<u>\$ 365,207.30</u>
Total Fund Balance	<u>\$ 3,258,381.12</u>
Total Liabilities and Fund Balances	<u><u>\$ 3,718,018.05</u></u>

Statement of Revenue and Expenses Summary
For the 8 Months Ended February 28, 2025

	<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	\$5,427.00	\$2,155,662.48	\$2,875,427.00	\$ 719,764.52	74.97%
4100 - Membership Reimbursements	-	300,627.34	491,375.00	190,747.66	61.18%
4200 - Reimbursement for Losses	14,964.66	65,617.46	98,000.00	32,382.54	66.96%
4300 - Grant Revenue	-	375,461.76	500,616.00	125,154.24	75.00%
4400 - Registration & Event Receipts	-	7,560.00	5,000.00	(2,560.00)	151.20%
4500 - Investment & Interest	8,097.48	65,102.03	83,328.00	18,225.97	78.13%
Total Revenue	<u>28,489.14</u>	<u>2,970,031.07</u>	<u>4,053,746.00</u>	<u>1,083,714.93</u>	<u>73.27%</u>
Expenses					
5000 - Salaries & Wages	118,521.46	1,013,405.23	1,577,736.00	564,330.77	64.23%
5020 - Personnel Benefits	38,275.26	288,252.71	445,419.00	157,166.29	64.71%
5100 - Building & Grounds	2,755.87	52,729.60	97,410.00	44,680.40	54.13%
5200 - Professional Development	199.54	11,356.36	14,700.00	3,343.64	77.25%
5300 - Membership Development	-	5,061.21	10,750.00	5,688.79	47.08%
5400 - Information & Technology Services	8,877.45	768,910.13	1,206,700.00	437,789.87	63.72%
5500 - General Office	580.28	3,223.19	12,700.00	9,476.81	25.38%
5600 - Hardware & Equipment	-	1,673.14	2,000.00	326.86	83.66%
5700 - Insurance	-	11,899.00	11,400.00	(499.00)	104.38%
5800 - Contractual Services	8,933.70	89,946.79	125,760.00	35,813.21	71.52%
5900 - Library Materials & Content	7,046.96	355,063.45	584,375.00	229,311.55	60.76%
6000 - Interest & Fees	486.95	3,302.96	2,474.00	(828.96)	133.51%
Total Expenses	<u>185,677.47</u>	<u>2,604,823.77</u>	<u>4,093,745.90</u>	<u>1,488,922.13</u>	<u>63.63%</u>
Excess Revenues less Expenses	<u>\$ (157,188.33)</u>	<u>\$ 365,207.30</u>	<u>\$ (39,999.90)</u>	<u>\$ (405,207.20)</u>	

Statement of Revenue and Expenses
For the 8 Months Ended February 28, 2025

	<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	\$ 2,151,948.48	\$ 2,871,727.00	\$ 719,778.52	74.94%
4011 - SWAN Internet Access Membership Fees	3,714.00	3,714.00	3,700.00	(14.00)	100.38%
4190 - Member Group Purchase Receipts	0.00	300,627.34	491,375.00	190,747.66	61.18%
4220 - Reimbursement Losses for Resource Sharing	5,839.41	36,761.75	50,000.00	13,238.25	73.52%
4240 - E-Commerce Transactions	9,125.25	28,855.71	43,000.00	14,144.29	67.11%
4250 - Deaccession Transactions	0.00	0.00	5,000.00	5,000.00	0.00%
4310 - RAILS Support to SWAN	0.00	375,461.76	500,616.00	125,154.24	75.00%
4499 - Annual Conference Receipts	0.00	7,560.00	5,000.00	(2,560.00)	151.20%
4510 - Interest Income	8,097.48	65,102.03	83,328.00	18,225.97	78.13%
Total Revenue	<u>28,489.14</u>	<u>2,970,031.07</u>	<u>4,053,746.00</u>	<u>1,083,714.93</u>	<u>73.27%</u>
Expenses					
5000 - Salaries & Wages	118,521.46	1,013,405.23	1,577,736.00	564,330.77	64.23%
5021 - FICA Expense	8,725.46	75,205.76	120,700.00	45,494.24	62.31%
5023 - Worker's Compensation	0.00	0.00	4,719.00	4,719.00	0.00%
5024 - Retirement Benefits	11,525.27	96,321.12	143,700.00	47,378.88	67.03%
5025 - Health, Dental, Life And Disability Insurance	18,024.53	116,473.90	174,800.00	58,326.10	66.63%
5026 - Tuition Reimbursements	0.00	0.00	1,100.00	1,100.00	0.00%
5085 - Staff Wellness	0.00	251.93	400.00	148.07	62.98%
5110 - Rent/Lease	0.00	35,824.09	88,000.00	52,175.91	40.71%
5120 - Utilities	605.14	4,770.83	4,300.00	(470.83)	110.95%
5130 - Property Insurance	0.00	642.00	650.00	8.00	98.77%
5140 - Repairs & Maintenance	1,500.73	1,872.43	960.00	(912.43)	195.04%
5150 - Custodial Service & Supplies	650.00	9,620.25	3,500.00	(6,120.25)	274.86%
5210 - Conference Travel	0.00	3,607.94	6,000.00	2,392.06	60.13%
5220 - Staff Meetings	199.54	787.42	900.00	112.58	87.49%
5230 - Staff Professional Development	0.00	4,843.00	4,000.00	(843.00)	121.08%
5240 - Professional Association Membership Dues	0.00	528.00	2,500.00	1,972.00	21.12%
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	1,041.71	800.00	(241.71)	130.21%
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	236.00	6,260.11	16,800.00	10,539.89	37.26%
5430 - Server Software Licensing	6,505.24	97,803.58	121,800.00	23,996.42	80.30%
5440 - Library Services Platform	0.00	511,767.24	921,000.00	409,232.76	55.57%
5450 - Data Management Services	1,445.12	31,494.88	33,000.00	1,505.12	95.44%
5460 - Information Subscription Service	0.00	78,826.32	75,700.00	(3,126.32)	104.13%
5470 - Subscription Support Services	289.00	33,420.00	23,200.00	(10,220.00)	144.05%
5480 - Telecommunications	402.09	8,004.20	14,500.00	6,495.80	55.20%
5490 - Group Purchases - Services	0.00	1,333.80	700.00	(633.80)	190.54%
5510 - Office Supplies	466.53	1,344.70	2,200.00	855.30	61.12%
5520 - Postage	113.75	543.53	500.00	(43.53)	108.71%
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	0.00	11,899.00	11,400.00	(499.00)	104.38%
5810 - Legal	0.00	117.50	1,500.00	1,382.50	7.83%
5820 - Accounting	1,085.00	15,595.00	19,160.00	3,565.00	81.39%
5830 - Consulting	0.00	8,270.00	5,000.00	(3,270.00)	165.40%
5840 - Payroll Service Fees	597.04	3,129.25	4,500.00	1,370.75	69.54%
5860 - Notification & Collection	7,251.66	50,766.04	86,700.00	35,933.96	58.55%
SWAN Board Meeting					

Statement of Revenue and Expenses
For the 8 Months Ended February 28, 2025

	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	0.00	33,798.13	50,000.00	16,201.87	67.60%
5940 - E-Commerce Payment Transactions	7,046.96	25,159.86	43,000.00	17,840.14	58.51%
5990 - Group Purchases - Content	0.00	296,105.46	491,375.00	195,269.54	60.26%
6010 - Bank Fees	486.95	3,302.96	2,424.00	(878.96)	136.26%
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>185,677.47</u>	<u>2,604,823.77</u>	<u>4,093,745.90</u>	<u>1,488,922.13</u>	<u>63.63%</u>
 Excess Revenues less Expenses	 <u>\$ (157,188.33)</u>	 <u>\$ 365,207.30</u>	 <u>\$ (39,999.90)</u>	 <u>\$ (405,207.20)</u>	

**SWAN Library Services
Check Register**

All Bank Accounts
February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Vendor Checks						
Lyons Public Library				10762	02/28/25	<u>(7.90)</u>
5940	E-Commerce Payment Transactions	To VOID check #10762	-7.90			
William Leonard Public Library District				10779	02/28/25	<u>(63.15)</u>
5940	E-Commerce Payment Transactions	To VOID check #10779	-63.15			
Harvey Public Library District				10901	02/28/25	<u>(9.56)</u>
5940	E-Commerce Payment Transactions	To VOID check #5940	-9.56			
Acorn Public Library				11176	02/19/25	<u>200.83</u>
5940	E-Commerce Payment Transactions	Acorn Public Library - December & January	200.83			
Addison Public Library				11177	02/19/25	<u>369.57</u>
5940	E-Commerce Payment Transactions	Addison Public Library - December & January	369.57			
Batavia Public Library				11178	02/19/25	<u>203.98</u>
5940	E-Commerce Payment Transactions	Batavia Public Library - December & January	203.98			
Beecher Community Library District				11179	02/19/25	<u>64.29</u>
5940	E-Commerce Payment Transactions	Beecher Community Library District - December & January	64.29			
Berkeley Public Library				11180	02/19/25	<u>17.96</u>
5940	E-Commerce Payment Transactions	Berkeley Public Library - December & January	17.96			
Berwyn Public Library				11181	02/19/25	<u>189.92</u>
5940	E-Commerce Payment Transactions	Berwyn Public Library - December & January	189.92			
Bloomingtondale Public Library				11182	02/19/25	<u>101.80</u>
5940	E-Commerce Payment Transactions	Bloomingtondale Public Library - December & January	101.80			
Broadview Public Library District				11183	02/19/25	<u>97.50</u>
5940	E-Commerce Payment Transactions	Broadview Public Library District - December & January	97.50			

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Carol Stream Public Library				11184	02/19/25	<u>153.68</u>
5940	E-Commerce Payment Transactions	Carol Stream Public Library - December & January	153.68			
Chicago Heights Public Library				11185	02/19/25	<u>59.14</u>
5940	E-Commerce Payment Transactions	Chicago Heights Public Library - December & January	59.14			
Cicero Public Library				11186	02/19/25	<u>56.84</u>
5940	E-Commerce Payment Transactions	Cicero Public Library - December & January	56.84			
Clarendon Hills Public Library				11187	02/19/25	<u>22.82</u>
5940	E-Commerce Payment Transactions	Clarendon Hills Public Library - December & January	22.82			
Crestwood Public Library District				11188	02/19/25	<u>8.85</u>
5940	E-Commerce Payment Transactions	Crestwood Public Library District - December & January	8.85			
Crete Public Library District				11189	02/19/25	<u>52.42</u>
5940	E-Commerce Payment Transactions	Crete Public Library District - Decembe & January	52.42			
Dolton Public Library District				11190	02/19/25	<u>18.90</u>
5940	E-Commerce Payment Transactions	Dolton Public Library District - December & January	18.90			
Elmwood Park Public Library				11191	02/19/25	<u>42.48</u>
5940	E-Commerce Payment Transactions	Elmwood Park Public Library - December & January	42.48			
Flossmoor Public Library				11192	02/19/25	<u>152.50</u>
5940	E-Commerce Payment Transactions	Flossmoor Public Library - December & January	152.50			
Franklin Park Public Library District				11193	02/19/25	<u>29.85</u>
5940	E-Commerce Payment Transactions	Franklin Park Public Library District - December & January	29.85			
Geneva Public Library District				11194	02/19/25	<u>515.59</u>

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5940	E-Commerce Payment Transactions	Geneva Public Library District - December & January	515.59			
Glen Ellyn Public Library				11195	02/19/25	<u>139.22</u>
5940	E-Commerce Payment Transactions	Glen Ellyn Public Library - December & January	139.22			
Glenside Public Library				11196	02/19/25	<u>204.16</u>
5940	E-Commerce Payment Transactions	Glenside Public Library - December & January	204.16			
Grande Prairie Public Library				11197	02/19/25	<u>64.06</u>
5940	E-Commerce Payment Transactions	Grande Prairie Public Library - December & January	64.06			
Green Hills Public Library District				11198	02/19/25	<u>168.70</u>
5940	E-Commerce Payment Transactions	Green Hills Public Library District - December & January	168.70			
Harvey Public Library District				11199	02/19/25	<u>18.83</u>
5940	E-Commerce Payment Transactions	Harvey Public Library District - December & January	18.83			
Hillside Public Library				11200	02/19/25	<u>199.29</u>
5940	E-Commerce Payment Transactions	Hillside Public Library - December & January	199.29			
Hinsdale Public Library				11201	02/19/25	<u>139.26</u>
5940	E-Commerce Payment Transactions	Hinsdale Public Library - December & January	139.26			
Hodgkins Public Library District				11202	02/19/25	<u>9.23</u>
5940	E-Commerce Payment Transactions	Hodgkins Public Library District - Decembe & January	9.23			
Itasca Community Library				11203	02/19/25	<u>30.32</u>
5940	E-Commerce Payment Transactions	Itasca Community Library - December & January	30.32			
Justice Public Library District				11204	02/19/25	<u>18.82</u>
5940	E-Commerce Payment Transactions	Justice Public Library District - December & January	18.82			

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Lansing Public Library				11205	02/19/25	<u>50.82</u>
5940	E-Commerce Payment Transactions	Lansing Public Library - December & January	50.82			
Linda Sokol Francis Brookfield Library				11206	02/19/25	<u>116.06</u>
5940	E-Commerce Payment Transactions	Linda Sokol Francis Brookfield Library - December & January	116.06			
Lyons Public Library				11207	02/19/25	<u>53.72</u>
5940	E-Commerce Payment Transactions	Lyons Public Library - December & January	53.72			
Matteson Public Library				11208	02/19/25	<u>8.52</u>
5940	E-Commerce Payment Transactions	Matteson Public Library - December & January	8.52			
Melrose Park Public Library				11209	02/19/25	<u>24.73</u>
5940	E-Commerce Payment Transactions	Melrose Park Public Library - December & January	24.73			
Messenger Public Library of North Aurora				11210	02/19/25	<u>37.72</u>
5940	E-Commerce Payment Transactions	Messenger Public Library of North Aurora - December & January	37.72			
Nancy L. McConathy Public Library District				11211	02/19/25	<u>8.37</u>
5940	E-Commerce Payment Transactions	Nancy L. McConathy Public Library District - December & January	8.37			
Oak Brook Public Library				11212	02/19/25	<u>270.84</u>
5940	E-Commerce Payment Transactions	Oak Brook Public Library - December & January	270.84			
Oak Lawn Public Library				11213	02/19/25	<u>112.61</u>
5940	E-Commerce Payment Transactions	Oak Lawn Public Library - December & January	112.61			
Park Forest Public Library				11214	02/19/25	<u>65.86</u>
5940	E-Commerce Payment Transactions	Park Forest Public Library - December & January	65.86			
Prairie Trails Public Library District				11215	02/19/25	<u>6.56</u>
5940	E-Commerce Payment Transactions	Prairie Trails Public Library District	6.56			

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
River Forest Public Library				11216	02/19/25	<u>232.29</u>
5940	E-Commerce Payment Transactions	River Forest Public Library - December & January	232.29			
Roselle Public Library				11217	02/19/25	<u>77.70</u>
5940	E-Commerce Payment Transactions	Roselle Public Library - December & January	77.70			
South Holland Public Library				11218	02/19/25	<u>31.10</u>
5940	E-Commerce Payment Transactions	South Holland Public Library - December & January	31.10			
St. Charles Public Library District				11219	02/19/25	<u>226.22</u>
5940	E-Commerce Payment Transactions	St. Charles Public Library District - December & January	226.22			
Steger-South Chicago Heights				11220	02/19/25	<u>77.68</u>
5940	E-Commerce Payment Transactions	Steger-South Chicago Heights - December & January	77.68			
Stickney-Forest View Public Library District				11221	02/19/25	<u>14.16</u>
5940	E-Commerce Payment Transactions	Stickney-Forest View Public Library District - December & January	14.16			
Sugar Grove Public Library District				11222	02/19/25	<u>396.87</u>
5940	E-Commerce Payment Transactions	Sugar Grove Public Library District - December & January	396.87			
Town & Country Public Library District				11223	02/19/25	<u>83.65</u>
5940	E-Commerce Payment Transactions	Town & Country Public Library District - December & January	83.65			
University Park Public Library District				11224	02/19/25	<u>8.02</u>
5940	E-Commerce Payment Transactions	University Park Public Library District - December & January	8.02			
Villa Park Public Library				11225	02/19/25	<u>146.32</u>
5940	E-Commerce Payment Transactions	Villa Park Public Library - December & January	146.32			
Westmont Public Library				11226	02/19/25	<u>178.44</u>

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5940	E-Commerce Payment Transactions	Westmont Public Library - December & January	178.44			
Woodridge Public Library				11227	02/19/25	<u>125.66</u>
5940	E-Commerce Payment Transactions	Woodridge Public Library - December & January	125.66			
Worth Public Library District				11228	02/19/25	<u>11.31</u>
5940	E-Commerce Payment Transactions	Worth Public Library District - December & January	11.31			
Oak Park Public Library				11229	02/20/25	<u>1,411.53</u>
5940	E-Commerce Payment Transactions	Oak Park Public Library - December & January	1,411.53			
Unique Integrated Communications, Inc.				11230	02/20/25	<u>5,356.66</u>
5860	Notification & Collection	Unique Integrated Communications, Inc.- MessageBee	4,795.50			
5860	Notification & Collection	Unique Integrated Communications, Inc. - Curbside	40.00			
5860	Notification & Collection	Unique Integrated Communications, Inc. - Curbside	40.00			
5860	Notification & Collection	Unique Integrated Communications, Inc. -Notices	481.16			
Wellness Insurance Network-WIN				11231	02/20/25	<u>167.68</u>
5025	Health, Dental, Life And Disability Insurance	Wellness Insurance Network-WIN	167.68			
Unique Integrated Communications, Inc.				11232	02/27/25	<u>1,895.00</u>
5860	Notification & Collection	Unique Integrated Communications, Inc.- balance due	1,895.00			
First Bankcard				51309	02/14/25	<u>10,625.12</u>
5140	Repairs & Maintenance	First Bankcard - Nest labs	240.00			
5140	Repairs & Maintenance	First Bankcard - Imperial Surveillance - final QR	185.85			
5140	Repairs & Maintenance	First Bankcard - Imperial Surveillance set up at HQ	1,074.88			
5150	Custodial Service & Supplies	First Bankcard - HQ cleaning service	650.00			
5220	Staff Meetings	First Bankcard	49.54			
5220	Staff Meetings	First Bankcard - dp staff party	150.00			

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5420	Application Software Licensing	First Bankcard - Techsmith (snagit)	182.00			
5420	Application Software Licensing	First Bankcard - Mailchimp	54.00			
5430	Server Software Licensing	First Bankcard - DNS made easy	89.63			
5430	Server Software Licensing	First Bankcard - Microsoft azure	6,415.61			
5450	Data Management Services	First Bankcard - Marcive final	327.36			
5470	Subscription Support Services	First Bankcard - Sendgrid	289.00			
5480	Telecommunications	First Bankcard - Microsoft calling plan	288.00			
5480	Telecommunications	First Bankcard - Grasshopper	48.97			
5510	Office Supplies	First Bankcard - Amazon	12.99			
5510	Office Supplies	First Bankcard - Amazon	64.66			
5510	Office Supplies	First Bankcard	9.21			
5510	Office Supplies	First Bankcard - Amazon	207.25			
5510	Office Supplies	First Bankcard - Amazon	143.54			
5510	Office Supplies	First Bankcard - Amazon	28.88			
5520	Postage	First Bankcard	104.75			
5520	Postage	First Bankcard	9.00			
Comcast				51310	02/06/25	<u>65.12</u>
5480	Telecommunications	Comcast - remainder on QR	65.12			
Reliance Standard Life Insurance Co.				51311	02/10/25	<u>992.56</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co.	992.56			
ComEd				51312	02/14/25	<u>810.14</u>
5120	Utilities	ComEd	810.14			
Lauterbach & Amen, LLP				51313	02/27/25	<u>1,085.00</u>
5820	Accounting	Lauterbach & Amen, LLP - January	1,085.00			
ESRI				51314	02/27/25	<u>2,500.00</u>
5450	Data Management Services	ESRI - Educational Adm Use Dept Small annual sub	2,500.00			
Reliance Standard Life Insurance Co.				51315	02/27/25	<u>992.56</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co.	992.56			

SWAN Library Services

Check Register

All Bank Accounts

February 2025

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
LIMRiCC 5025	Health, Dental, Life And Disability Insurance	LIMRiCC - March	20,582.83	51317-1	02/28/25	<u>20,582.83</u>
Check List Total						<u><u>52,119.63</u></u>

SWAN BOARD MEETING MINUTES

February 21, 2025, 9:30 a.m.

Glen Ellyn Public Library

400 Duane Street

Glen Ellyn, IL 60137

1. Call to Order, Roll Call

President Cottrill called the meeting to order at 9:33 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
Scott Brandwein, SWAN Assistant Director
Ginny Blake, SWAN Business Manager

There was no public comment.

3. Action Item

Acceptance of February 21, 2025, SWAN Board Meeting Agenda

Bussey moved, seconded by Musil that it be

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE FEBRUARY 21, 2025, SWAN BOARD MEETING AGENDA AS PRESENTED

Motion carried by unanimous voice vote.

4. Action Item

Approval of the SWAN Financials, January 2025

Waltman moved, seconded by Johnson that it be

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR JANUARY 1, 2025, THROUGH JANUARY 31, 2025, AND ACCEPTS THE BALANCE SHEET AND DETAILS OF EXPENDITURES FOR JANUARY 2025

Motion carried by roll call vote with the following results:

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

5. Action Item

Acceptance of January 24, 2025, SWAN Board Meeting Minutes

Musil moved, seconded by Johnson that it be

RESOLVED THAT THE SWAN BOARD ACCEPTS THE JANUARY 24, 2025, SWAN BOARD MEETING MINUTES AS AMENDED

Motion carried by unanimous voice vote.

6. Reports

a. Board President Report

Cottrill discussed that the SWAN Board will have 3 positions to fill beginning July 1, 2025.

b. Executive Report

Skog reviewed the Executive Director Report as reported in the board packet including a brief discussion on the FY24 financial audit. Skog will contact Lauterbach & Amen to receive an explanation of the GASB96 rule as reported 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.

7. Action Item

Acceptance of the fiscal year 2024 financial audit

Musil moved, seconded by Waltman that it be

RESOLVED THAT THE SWAN BOARD ACCEPTS THE FISCAL YEAR 2024 FINANCIAL AUDIT AS PRESENTED

Motion carried by roll call vote with the following results:

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

8. Discussion Item

Environmental Scan Task Force report & recommendation

A discussion ensued based on the Task Force. Several options were discussed along with the Task Force recommendations.

Discussion Item

Recommendation on Aspen Discovery & LIDA hosting contract

ByWater Solutions contract is coming up for renewal on May 1. After a discussed ensued, the board agreed with the recommendation to switch to Grove for Libraries as the replacement hosting and support vendor for Aspen Discovery and LiDA.

9. Discussion Item

Platform satisfaction survey 2025 & introductory email

A brief discussion ensued.

10. Discussion Item

March 6, 2025, Quarterly meeting agenda.

A brief discussion ensued. An action item is needed to add “Approval of September 5, 2024, Quarterly meeting minutes” is needed.

Cottrill adjourned the meeting at 10:44 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

Jesse Blazek
Board Secretary

SWAN Executive Director Report

March 21, 2025

Update on activities

Grove for Libraries hosting contract completed

I have completed a hosting, support, and software development agreement with Grove for Libraries. As announced via SWANcom and posted on SWAN Support, we have fast tracked the server migration to be completed by March 26th. This project escalation has impacted some internal membership projects such as the new ticketing system.

Aspen Discovery check-out history data loss

SWAN patrons experienced a full loss of check-out history for 5 days which was restored from data backups on February 12th. We have since identified through tickets opened by member libraries since that time that for some patrons their check-out history is missing for weeks or months at a time.

We have concluded that the issue that caused this is unresolvable from data restoration, as the gaps in data were caused by the intermittent Aspen Discovery outages related to our hosting with ByWater. We have communicated this to member libraries via SWANcom. We are discussing additional steps to help member library staff if patrons are inquiring about what occurred.

Springshare Patron Point contract completed

The online patron registration service contract has been completed with Patron Point. The agreement reflects all of the negotiated pricing and configuration discussed last year. The service will begin in July 2025 and the project meetings will begin in April once our Aspen server migration has concluded.

Aspen Discovery Governance Task Force project

The group continues to meet bi-weekly. I presented an overview of the task force work to date at the Aspen Community meeting on Tuesday, March 18th. The group has recently investigated the option of incorporating under a software organization, Open Library Foundation (OLF). The OLF is a group that has several library software projects under its umbrella, such as FOLIO, VuFind, ReShare, OpenRS, among others.

Board considerations

Overview of 2025 SWAN projects

The SWAN management team met early in 2025 to outline its projects for the year. Scott Brandwein will present an overview of these projects as an agenda item for the March 21, 2025 SWAN Board meeting.

SWAN Platform Survey analysis

The survey was extended one additional week for submissions. The packet for this month’s board meeting includes an overview of the submissions received to-date. The comments submitted will be analyzed by SWAN management team using the same method as last year.

Monthly Financial Report

February Balance Sheet

The Fund Balance Unrestricted line for February is \$2,707,185.661 which 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 67% 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 three quarters.

	FY25 Budget	Ending February 2025	Percentage of budget YTD 67%
Total Revenue	\$4,053,746.00	\$2,970,031.07	73%
Total Expenses	\$4,093,745.90	\$2,604,823.77	64%
Over / (Under)	(\$39,999.90)	\$365,207.30	

Accounts Receivable

4010 - SWAN Full Membership Fees: 74.94%

3rd quarter invoices were sent out in January 2025, reflecting 75% of this revenue budget line.

4011 – Internet Access Membership Fees: 100.38%

The six school libraries were invoiced in January. The invoices for FY25 were increased 2%.

4190 – Member Group Purchase Receipts: 61.18%

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

4310 – RAILS Support to SWAN: 75%

The 3rd quarter payment was made to SWAN totaling \$125,153.92 in January.

4510 – Interest Income: 78.13%

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 was 3.3% for January.

Accounts Payable

5110 – Rent/Lease: 40.71%

SWAN has negotiated 9 months' rent abatement through the rest of the fiscal year.

5120—Utilities: 110.95%

Over budget for year, but expenses will remain low as SWAN no longer has natural gas payments in the new office space.

5140—Repairs & Maintenance: 195.04%

Over budget due to office moving expenses and facility security expenses for the new office.

5150—Custodial Services & Supplies: 274.86%

Over budget due to additional one-time post construction cleaning of the new office space.

5260 – Online Learning: 318.00%

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

5310—Travel Reimbursement: 130.21%

Over budget this year due to staff library visits and in-person membership networking meetings.

5460 – Information Subscription Service: 104.13%

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

5470 – Subscription Support Services: 144.05%

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

5490—Group Purchases Services: 190.54%

The group purchase for self-check software from EnvisionWare was completed in January, which includes a revenue offset in the #4190 Member Group Purchase Receipts.

5830—Consulting: 165.40%

Expenses for the include a benchmarking analysis of all SWAN employee positions and project consulting for the OCLC Holdings Manager (OHM).

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.

6010—Bank Fees: 136.26%

SWAN utilizes services within its bank such as positive pay and ACH which for the year are totaling higher than anticipated.

Operations Report: February 2025

Summary

Membership engagement activities and statistics are reported through the month-end of February 2025. System outages will be reported as of final assembly of the report to ensure that any critical system issues are documented as quickly as possible. Highlighted activities represent on-site library events.

Member Engagement – All Staff

A recap of member engagement activities in February 2025.

Site Visits, Training, and Consultation

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

Date	Event Name	Teams Responsible	Category
2/4/2025	Committee of the Whole Meeting	Administration	Governance
2/13/2025	Acquisitions & Cataloging Networking Group	Bibliographic Services; Information Technology & System Support	Membership Meeting
2/19/2025	Circulation Networking Group	User Experience; Information Technology & System Support	Membership Meeting
2/21/2025	SWAN Board Meeting	Administration	Governance
2/25/2025	SWAN Fireside Chat	All	Membership Meeting
2/25- 26/2025	SWAN Help Desk Orientations	Administration	Membership Meeting
2/27/2025	e-Resource Working Group	User Experience	Membership Meeting

User Group and Advisory Meeting Recap

Acquisitions and Cataloging Networking Group (2/13/2025)

In February, we held our first Acquisitions and Cataloging Networking Group meeting since its rebranding. Member libraries shared on a variety of topics including in-house use sensory kits, weeding practices at libraries, trends in account creation at library vendors, and local practices for creating book club kits. SWAN staff provided some updates on OCLC WorldShare, publishers reusing ISBNs, PRE-CAT templates in WorkFlows, and the Cataloging Working Group meeting. Finally, SWAN staff requested feedback from member libraries on their creation process for Library of Things catalog records and their experience in the Acquisitions Rollover process this year. Our next meeting is Thursday, May 8th and will take place in-person at the Downers Grove Public Library.

Circulation Networking Group (2/19/2025)

Kathy Welko from Addison Public Library presented to the group on best practices for looking up patron information for patrons without a library card. Tara Wood shared an update on the catalog reading history data loss incident. Vickie Totton provided an update on NCOA processes, and the group discussed their internal processes on handling patrons flagged through NCOA.

Major Projects & Research

Aspen Discovery

Aspen release 24.02 included some enhancements to align the app and the web catalog in the visual display of the holds screen, along with some helpful new features for setting up new libraries. The 24.03 release will include the SWAN sponsored development work on series pages.

Server migration

As SWAN is moving to use Grove for Libraries for Aspen hosting and support, we are migrating to Grove-managed servers on March 25th. This is a major project that has required coordinating data exports between vendors and modifications to our hosted app. We are hopeful for a smooth transition and looking forward to increased stability in the coming months.

OMNI OverDrive consortium

Kaneville Public Library joined the OMNI Libraries OverDrive consortium, and Olivia Montolin set up a new connection in our Aspen catalog to integrate their collections.

IT Infrastructure

Setup of new office continued through February. The conference room now has a wall-mounted whiteboard and TV. Lexii has been working on replacing our monitoring system with a new Zabbix server. She will be reaching out to Self-Maintenance libraries to ensure that they have the appropriate SNMP settings on their firewall to ensure that we can be more proactive in monitoring library VPN tunnels.

Ticketing System – HaloITSM

SWAN hosted two sessions to showcase the new Help Desk system for library staff, demonstrating the steps to open, track, respond to, and close tickets. We also demonstrated the service catalog feature that allows members to select specific services that SWAN provides and route tickets directly to SWAN staff that can handle them. The service desk further provides links to relevant documentation, forums, and consultation schedulers in our various areas of expertise.

We will be creating documentation for staff to follow when the interface goes live. Our go-live date for the HaloITSM helpdesk system is Tuesday, April 29th. Any relevant tickets still open in our old system will be re-created by SWAN staff in the new system. After we migrate, member staff will not have access to old tickets that were closed in the old system, but SWAN will keep an archive for reference.

Training Development

Our training activity for February and early March focused on further development of the training checklist for new staff members in technical services. We are currently testing a tagging system that will allow member staff to select their job functions and receive customized lists of the most relevant documentation and training materials to get them started in their role. This

Single Sign-On

Our SSO project is quickly coming together. We anticipate re-launching the Community Forums in late March with SSO built in. This will provide us with some real-world use while we finish preparation for the Halo ITMS launch in late April. The Halo launch requires users to be pre-populated in the system for the SSO module to work correctly. We've worked with Wayne Dixon at RAILS on leveraging the L2 and Halo APIs to harvest and ingest SWAN member library staff. Many of the individual pieces are functioning individually, and the final SSO piece will be integration with our Support Site redesign.

External Collaboration & Partnerships

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

Date	Event Name	Teams Involved	Topic
Alternate Mondays	Aspen Governance Task Force	Administration; User Experience	Partnerships
2/6/2025	Aspen Gathering	All	Partnerships
2/6/2025	Koha Demo with ByWater Solutions	Administration	Partnerships
2/10/2025	BLUEcloud Demo with SirsiDynix	Administration	Partnerships
2/12/2025	Polaris Demo with III	Administration	Partnerships
2/12/2025	OCLC Cataloging Community Meeting	Bibliographic Services; Administration	Partnerships
2/13/2025	HR Source Visit	Administration	Partnerships

Support, Documentation, and Training

Details on support tickets, documentation, and training.

System Maintenance & Outage Calendar

	Aspen/Hoopla Integration Issues	Number of checkouts remaining is not displaying correctly and checki...	Thu 1/2/2025 4:30 PM	Thu 1/2/2025 7:00 PM	
	SWAN App Non-Responsive	The LiDA app became unresponsive on Saturday morning. ByWater w...	Sat 1/11/2025 10:00 AM	Sat 1/11/2025 12:00 PM	
	Aspen/Boundless Issue	Boundless API disabled due to issues with checkouts and holds	Thu 1/16/2025 4:30 PM	Thu 1/16/2025 5:00 PM	
	Missing titles in checkout history	Titles added to checkout history during the DDoS attack were not sav...	Thu 1/23/2025 12:30 PM	Thu 1/23/2025 1:00 PM	
	LiDA/SWAN Libraries+ Down	The SWAN Libraries+ app and Aspen LiDA app are down.	Mon 1/27/2025 10:00 AM	Mon 1/27/2025 5:00 PM	
	LiDA/SWAN Libraries+ Down	The SWAN Libraries+ app and Aspen LiDA app are down.	Mon 2/3/2025 2:30 PM	Mon 2/3/2025 4:00 PM	
	Checkout History Missing in Pa...	Reports of missing checkout history lists in patron accounts on Aspe...	Fri 2/7/2025 11:30 AM	Wed 2/12/2025 7:00 AM	
	Intermittent catalog slowness/...	Aspen slow or inaccessible for brief periods. ByWater reports bot acti...	Wed 2/12/2025 8:30 AM	Tue 3/11/2025 6:00 AM	
	Aspen Indexing Issues	Indexes failing	Wed 3/5/2025 9:30 AM	Mon 3/10/2025 10:00 AM	
	LiDA (SWAN Mobile) Outage	LiDA access cut when our Production IP was blacklisted while address...	Mon 3/10/2025 9:00 AM	Mon 3/10/2025 3:30 PM	
	CloudFlare Enabled on Aspen	CloudFlare enabled on Aspen to alleviate bot traffic that was causing...	Tue 3/11/2025 12:00 AM	Wed 3/12/2025 12:00 AM	
	Checkout History Missing in As...	Checkout history missing for several users – able to restore some fro...	Thu 3/13/2025 12:00 AM	Fri 3/14/2025 12:00 AM	

Outage Tracking

Aspen checkout history

On March 13th, we received tickets reporting three patrons who were missing titles in their checkout histories. We were able to confirm these patrons were missing titles in their histories checked out between January and March 2025. We also found that our test server, which we use to test Aspen releases, had complete histories for these patrons and we were able to restore data for two of the three reported patrons.

Our test server was last cloned from production in September of 2023. Any patrons that had not turned on history before September 2023 would not have history recording in the test server. This server is meant to test releases, not serve as a data backup; we're lucky we're able to restore some histories due to the fact that we had this test server, but there are patrons that will experience permanent data loss.

We believe that issues in our production server prevented it from properly recording some titles. Since the titles were never recorded, there isn't a backup to restore from, as was the case in our February 2025 loss of checkout history. We are working to get a backup of our test server and working with Grove to load and dedupe reading histories in our new server; our hope is that as much data can be restored as possible when we go live on our new server.

Aspen and Aspen LiDA downtime

Our SWAN Libraries + app and the SWAN connection to Aspen LiDA were down on Monday, March 10th. ByWater Solutions staff inadvertently blocked our IP address and access to the apps in an attempt to address bot traffic.

Shortly after, ByWater Solutions implemented Cloudflare to help manage our bot traffic for the two weeks preceding our server migration. SWAN provided libraries' internal IP addresses to prevent blocked traffic; two libraries reported that their internal traffic was blocked, and access was quickly restored.

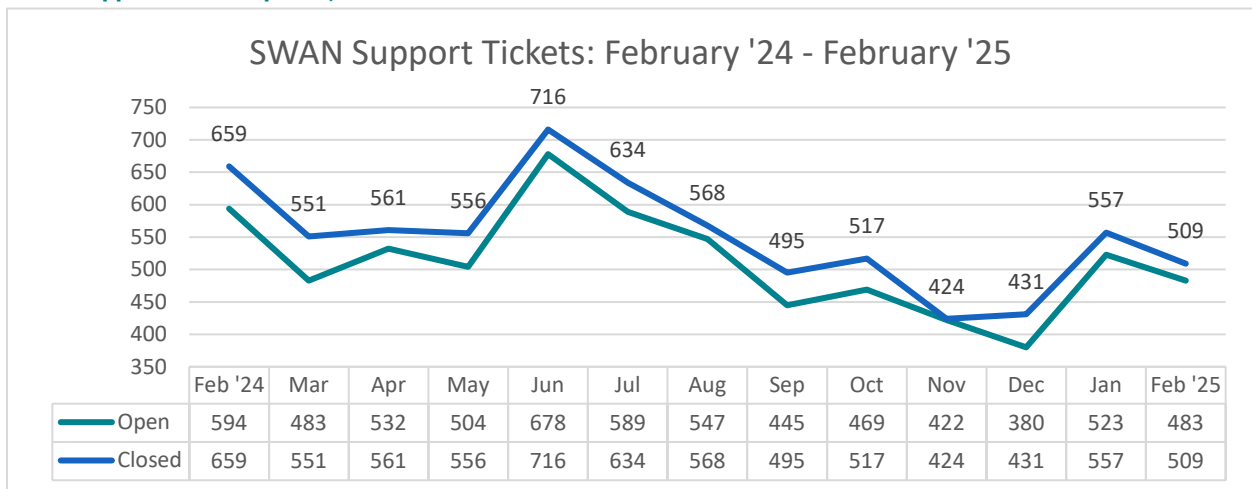
Boundless integration in Aspen

As of January 17th, the Boundless API integration in Aspen has been disabled. There are issues with the Boundless API, which causes titles available titles to appear as unavailable in Aspen. There is a fix for this issue in the 25.03 release of Aspen, which we will receive shortly following our server migration.

Support Tickets

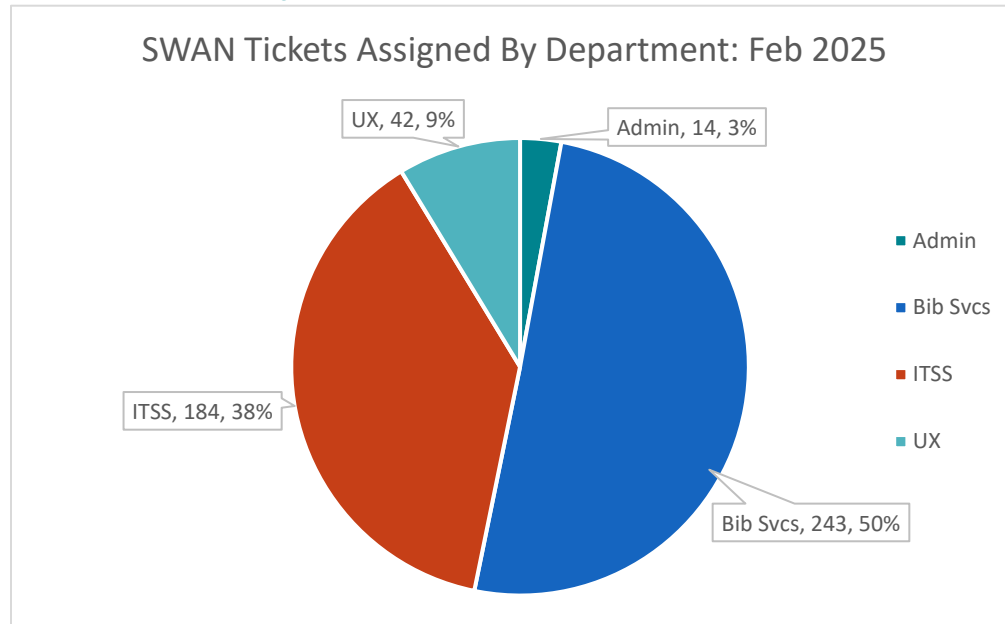
SWAN support staff continue to maintain an excellent monthly open/closed ticket ratio. Ticket volume is beginning to increase, typical for the new year.

SWAN Support Tickets Opened/Closed in Past 12 Months



Data labels reflect tickets closed each month.

SWAN Support Tickets Assigned by Department



Support Site

Due to the Aspen server migration, the SWAN Operations team shifted our project timelines and we are now planning the go live for our redesigned website for May 2025.

We have a minor planned code update to the support site on March 17th after hours, which should not impact library staff. SWAN staff are in the process of reviewing page permissions, with a goal of making as much documentation publicly accessible (not behind a staff login) as possible.

In the coming weeks, we will recruit library staff from our user groups to assist in rounds of testing two new versions of the home page, a public and a staff view, along with additional features for navigating the site and a “calendar view” of SWAN meetings and trainings.

Training Modules & Recordings

Learning Management System (SWAN Online Learning)

We added 12 new users in February to the SWAN online learning management system.

Maintenance

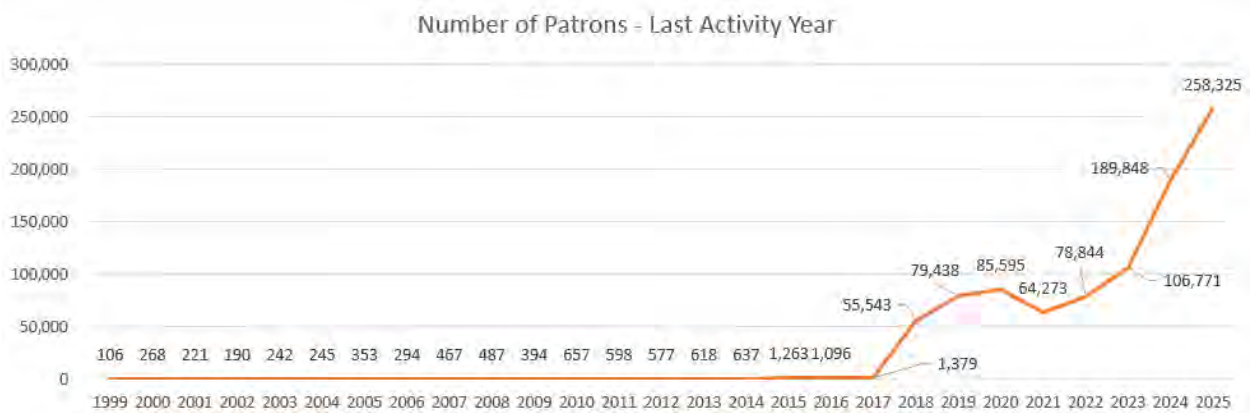
Automatic Monthly Patron Record Removal

In February, we purged 3,462 inactive patrons from the database.

As a reminder, March’s purge that would have originally been our first that removed patrons after 5 years of inactivity (down from our current 7 years) has been postponed to April to grant member staff

more opportunity to review candidate patrons for removal and provide feedback or request certain patrons be retained. Expect reported removal numbers from April to be very high.

SWAN recommends purging all patron records with last activity date prior to 3/1/2015 regardless of outstanding bills.

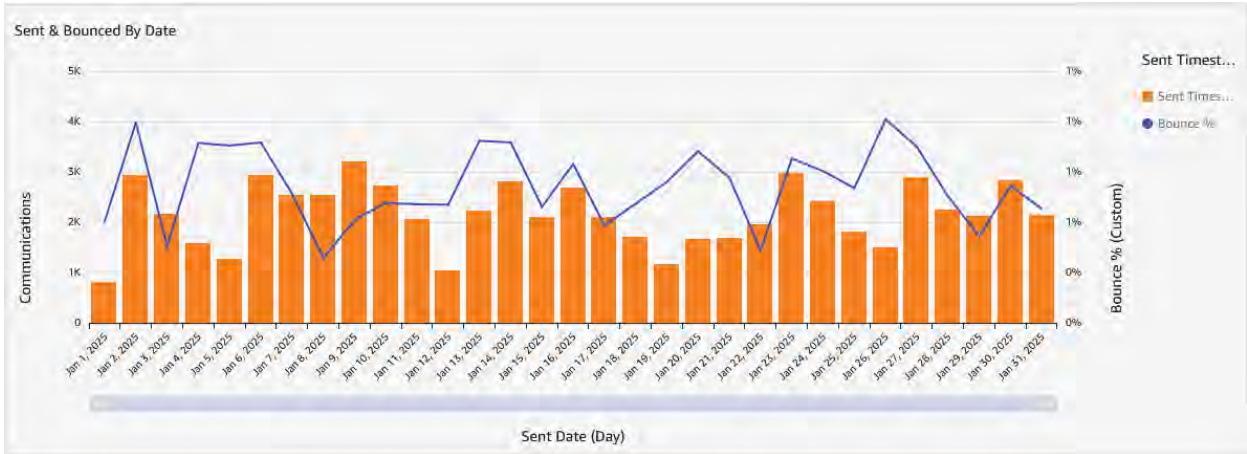


This chart shows patron counts by Last Activity Year. So far this year, 258,325 patrons have utilized SWAN member libraries' tracked services in 2025.

MessageBee Statistics

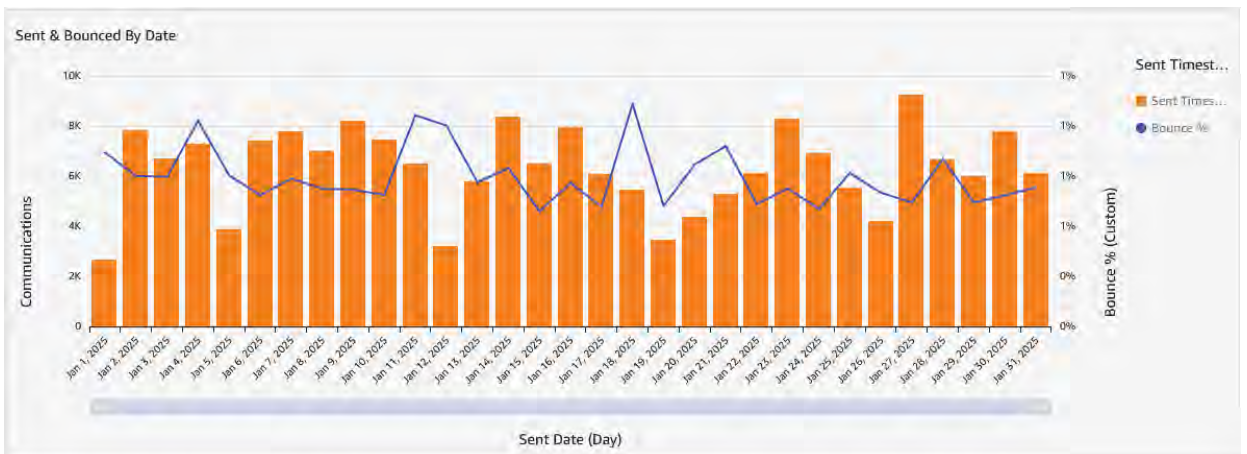
SMS notifications

Month, Yr	SMS Sent	Success Count	Success Rate	Failed Count	Failure Rate
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%
January, 2025	66,595	66,142	99.32%	453	0.68%
February, 2025	56,198	55,799	99.29%	399	0.71%



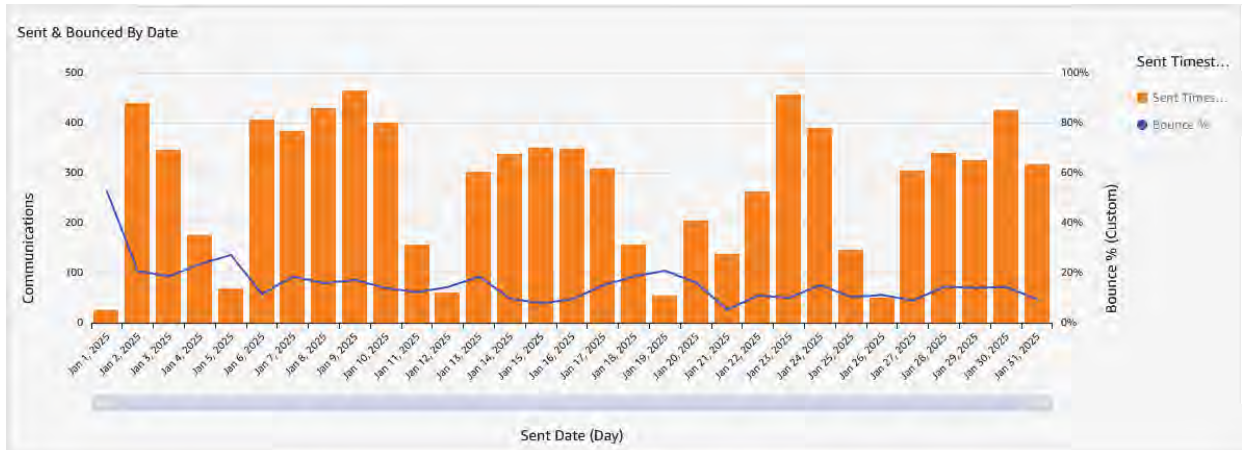
Email notifications

Month, Yr	Email Sent	Success Count	Success Rate	Failed Count	Failure Rate
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%
January, 2025	191,909	190,518	99.28%	1,391	0.72%
February, 2025	162,363	161,023	99.17%	1,340	0.83%



Voice notifications

Month, Yr	Total Calls Attempted	Success Count	Success Rate	Failed Count	Failure Rate
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%
January, 2025	7,927	7,555	95.31%	372	4.69%
February, 2025	6,469	6,213	96.04%	256	3.96%



Print Notices

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

Month/Yr	Bill Notices	Amount
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
January, 2025	523	\$ 481.16
February, 2025	411	\$ 378.12

SendGrid Statistics

Investigation into the increased number of emails dropped by SendGrid identified 125 invalid email addresses subscribed to SWANcom. These addresses were removed from the mailing list, so we anticipate fewer drops next month. We also generated a list of invalid emails in Symphony, which we will begin notifying libraries so they may request updated addresses.

Month/Yr	Total Requests	Total Processed	Success Rate (Delivered)	Addresses			Messages		
				Bounced	Marked as Spam	Invalid	Blocks	Bounce Drops	Spam Drops
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
Jan, '25	73,534	70,321	98.77% (69,455)	213	4	29	1,097	2,925	259
Feb '25	71,496	68,900	98.89% (68,137)	155	27	24	866	2,320	252

SWAN Announcements

Staff Development

Webinars and Trainings

Olivia attended OpenAthens Access Lab 2025 and attended sessions on OpenAthens UX, security and user privacy, and combatting misinformation.

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 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** 2022	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
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
Orig 2025	116	96											
Copy 2025	2,376	2,147											

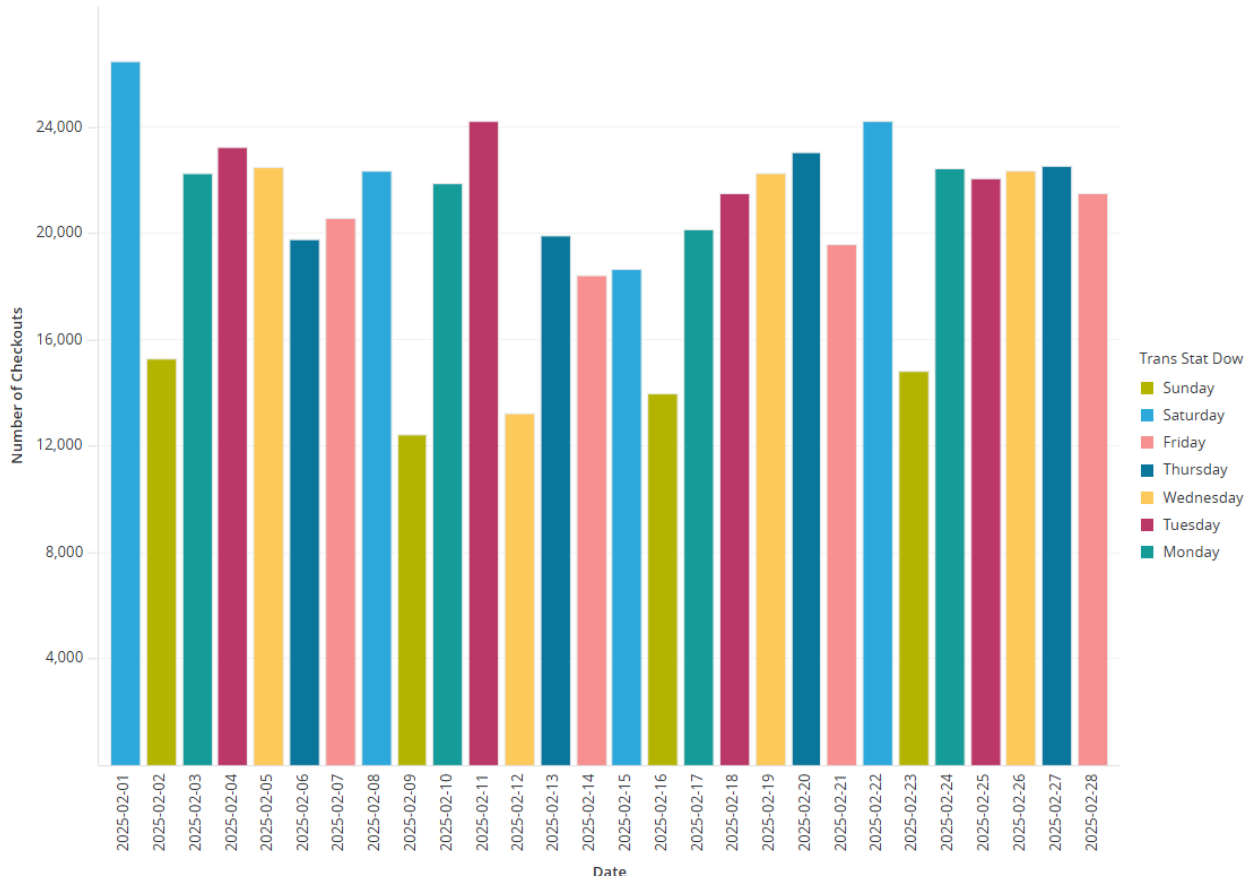
Records Added in 2024

In February, 38,664 new items were added to our database, including 6,066 new catalog records.

Circulation

In February, we had 571,581, reflecting our usual drop-off from January's surge. The ten SWAN member libraries with the most circulations account for 42% of overall systemwide circulation.

Daily Circulation Totals - Previous Month



Interlibrary Loan & Resource Sharing

Interlibrary loan checkouts between SWAN members was 100,421 in February, for 19% of total checkouts.

Reciprocal borrowing between SWAN libraries totaled another 18% of total checkouts at 96,387 checkouts. Non-SWAN reciprocal borrowing made up another 3% of checkouts (16,962 in total.)

OCLC Worldwide Resource Sharing

Our combined OCLC interlibrary loan statistics show that SWAN was again a net lender in February by a ratio of 2.07 items lent for each item borrowed. We lent 2,648 items and 8 copies and borrowed 1,277 items and 42 copies.

Online Public Catalog - Aspen

Top 25 Searches in Aspen (February 2025)

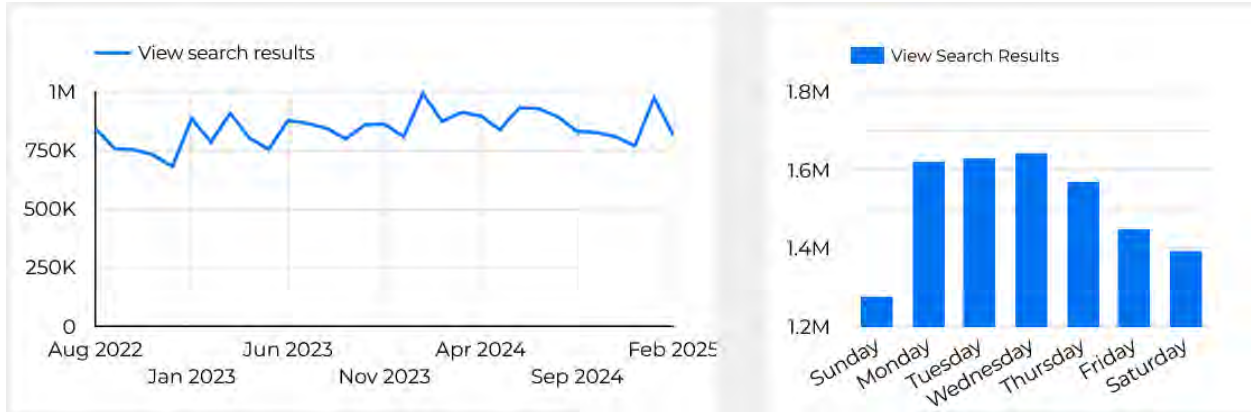
- | | | |
|--------------------|--------------------|--------------------|
| 1. freida mcfadden | 4. kristin hannah | 7. conclave |
| 2. dog man | 5. james patterson | 8. nintendo switch |
| 3. wicked | 6. james | 9. colleen hoover |

10. the housemaid
 11. fourth wing
 12. romance
 13. black history
 14. onyx storm
 15. the women

16. the wedding people
 17. minecraft
 18. dogman
 19. movies
 20. the god of the woods

21. harry potter
 22. pokemon
 23. let them
 24. spring
 25. library of things

Results Pageviews in Aspen

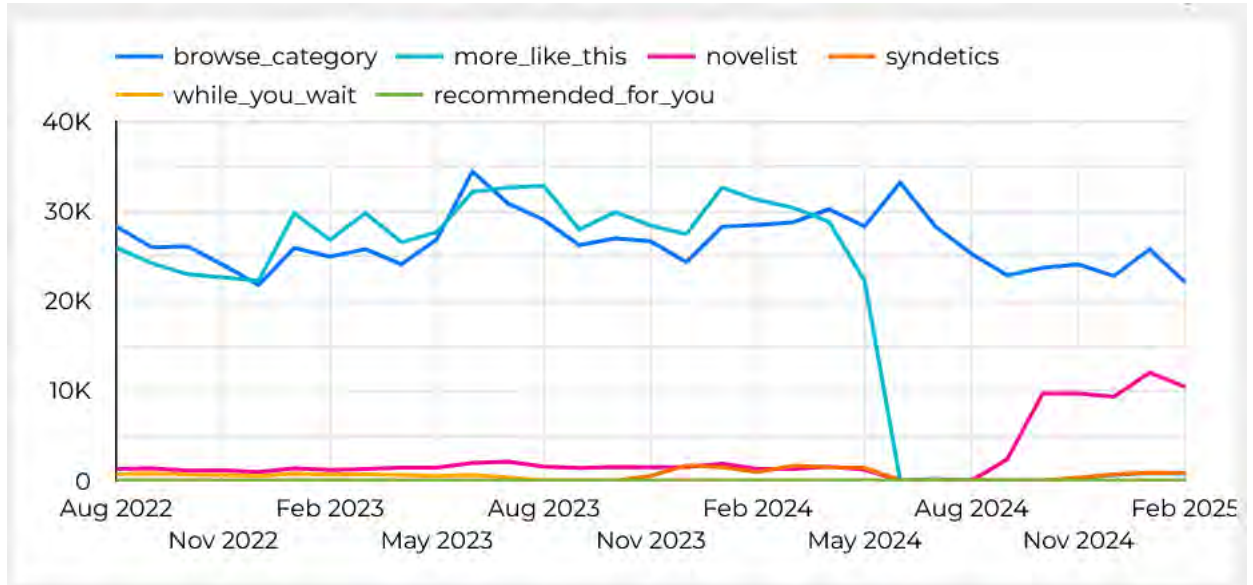


Usage of Recommendations

This data measures clicks on title recommendations presented to patrons.

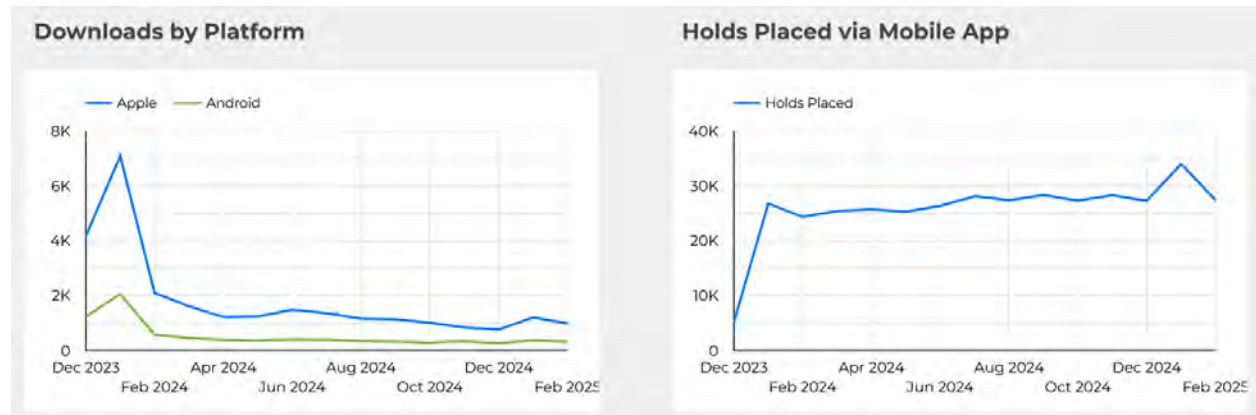
- Browse categories appear on the home page and they are generated by library staff
- “More Like This” were auto-generated by ProQuest Syndetics and appeared on a grouped work or record detail page – *removed June 2024 and replaced with the new Novelist Select display.*
- “While You Wait” are auto-generated 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 and in the SWAN consortium catalog.



SWAN Libraries + App – Aspen LiDA

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



SWAN
Calendar-Timetable of Deadlines and Board Action Requirements

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 FY26 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 2025 Projects

This is a summary of SWAN's project roadmap for calendar year 2025 including estimated timings, project leads, and project descriptions.

Disaster Recovery Plan – January 2025

Scott Brandwein, Assistant Director

As part of our initiative to improve our Cybersecurity and Incident Response protections, we have drafted a Disaster Recovery plan. The plan identifies a Disaster Recovery Team who will take lead on implementing the plan in the event of an unexpected event that affects SWAN services such as natural disaster, fire, flood, or ransomware attack.

The plan details steps to take for mitigation; reporting; restoration of SWAN services; communication with necessary parties including emergency workers, facilities staff, and the SWAN membership; and documenting events for insurance purposes. This document will be continuously updated and enhanced as we learn more about this topic.

HaloITSM Launch – Ongoing through March 2025

Scott Brandwein, Assistant Director

For many months, SWAN has been planning a move to a new ticketing system and helpdesk platform. In January, we finished configuration of the user and staff interfaces. We will provide member training in February on user portal while we integrate the platform into our Ping SSO environment so users can use L2 login credentials to access the system. The helpdesk will launch in March.

Novelist Select Sunsetting – Ongoing through March 2025

Aaron Skog, Scott Brandwein, Tara Wood

Novelist Select is a subscription that provides enhanced content for our discovery layers, the Aspen catalog and the SWAN Libraries + app (LiDA). After ProQuest made available Syndetics Unbound as a feature of our current subscription with them, we tested the product in coordination with our member libraries to ensure that Syndetics Unbound is a viable alternative. The one major drawback identified was the lack of book series support, a feature staff and patrons appreciate in Novelist Select.

We have been working with Grove for Libraries, a developer of the Aspen catalog, to implement a native series solution for series in Aspen so mitigate this loss. Now that that work is underway, we plan to sunset our Novelist Select subscription and transition to Syndetics Unbound.

Cybersecurity Assessment and Hand-off – January-February 2025

Ian Nosek, IT & Systems Support Manager

With Lexii Klopp, our new Network and Security Administrator, starting in early January, we are coordinating a transfer of responsibility to her role. Ian Nosek has been working on an assessment of our cybersecurity framework against CIS Controls v8, a set of best practices. He has completed that project and is handing off the assessment to Lexii to form a plan to close gaps in our security framework. She will provide a list of steps we can take in the short term, long term, and very long term to keep our systems secure.

This handoff also includes an orientation for Lexii in our Arctic Wolf portal and introduction to key staff on the Incident Response Team there.

Environmental Scan Task Force – Ongoing through February 2025

Aaron Skog, Executive Director

The board has formed an Environmental Scan Task Force to evaluate the software options for integrated library systems (ILS) and data analytics platforms. This project involves interviews with library systems and consortial staff who have recently switched platforms, and online surveys of other ILS users. This will culminate in a written report for the SWAN Board and membership outlining the software researched and making a recommendation on the current contract with SirsiDynix is up for renewal on April 30th.

The last board meeting on February 21st serves as a deadline for the report with a planned presentation to the membership at the March 6th Quarterly Meeting.

Website Redesign – Ongoing through March 2025

Tara Wood, User Experience Manager

We are working on redesigning the SWAN support site (support.swanlibraries.net) and the patron site (www.swanlibraries.net) with a goal of integrating the two into a single web presence. Tara Wood is taking lead on this project with Administration and the SWAN managers providing input. Our goals are to integrate single sign-on using L2 for authentication, improving usability for both staff and patrons, and removing barriers for all users to find needed documentation and information about SWAN.

The new site will be built on Drupal as our current support site is.

Training Strategy – Ongoing through March 2025

Scott Brandwein, Tara Wood

In January, we presented to the board a draft of a training strategy we have been working on along with Crystal Vela, our Consultant in Training and Development. The strategy outlines how we will evaluate the documentation and training needs of our membership, the requirements for choosing appropriate training formats, and a framework for ongoing evaluation and updating of existing materials.

This strategy has been presented to SWAN staff. Further implementation steps include process documentation for creation and maintenance of specific training types and testing the strategy on

some pilot projects: Acquisitions training in the online learning management system, and the creation of technical services training and documentation checklists for new staff.

Though the training strategy project ends after Q1 of this year, this is an area we plan to give a lot of attention through the calendar year with a coordinated endeavor to create accessible, task-focused materials that will help our members succeed.

LiDA Self-check Pilot & Launch – Delayed

Tara Wood, User Experience Manager

The SWAN Libraries + app (LiDA) has a feature for self-check that we wish to implement called scan-and-go. Unfortunately, the project has been met with delays, the most recent of which involves an error in the Symphony API that prevents the proper display of titles during self-check in the app. The error is known to Symphony and Aspen development teams, and we are hopeful that a resolution is in the works, though we do not have a timeline.

We are monitoring the situation and are prepared to leap back into this project as soon as the technical issues are fixed. Our three pilot libraries are Downers Grove, Indian Prairie, and Lansing, who will do a soft launch of the tool to their patrons and monitor its use. Once we are able to resume, testing should be simple, and we will be able to make a recommendation regarding rollout.

If we do move forward, rollout of the tool will be on an opt-in basis.

Single Sign-on Phase 1 – Ongoing through March 2025

Ian Nosek, IT & Systems Support Manager

The SWAN ITSS team has been working on implementing single sign-on for member staff using L2 as an identify provider. This will allow staff to sign in with their known L2 credentials and remain signed in to any service on the SWAN platform that is compatible. For this phase of the project, we are integrating the SWAN forums, the SWAN support site (in its redesigned form), and the HaloITSM helpdesk system.

Once those sites are integrated, we will evaluate and make a plan for another phase of the rollout. Potential candidates for the future are Symphony's BLUEcloud suite, Workflows, and the online learning system pending development on their end to accommodate the Ping SSO vendor's particular brand of access.

Aspen Series Development with Grove – January-March 2025

Scott Brandwein, Tara Wood

We have provided a set of specifications for native support for series pages and searching in Aspen. We are contracting with Grove for Libraries to build out this tool and roll it into the Aspen code for release to the Aspen community at large. The specifications call for using bibliographic data compiled by our catalogers to create series display pages in Aspen that provide users with ordered lists of book and media series similar to what we currently see with our Novelist Select subscription.

This project is planned in concert with our sunsetting of Novelist Select and will replace the functionality that we would otherwise lose in our transition to Syndetics Unbound. Grove will also build a tool for users to search series and get a specialized list of results.

This has been a topic of conversation between SWAN and the Aspen community for a long time, so the developers at Grove are familiar with what we hope to get out of its implementation. Though being developed with a partner, SWAN will have a lot of input and testing responsibilities, so our staff – especially our Bibliographic Services Team – are on deck to work closely with the developers to ensure this tool meets our users’ needs.

Entra & InTune Policies – January-April 2025

Ian Nosek, IT & System Support Manager

This project will enhance our organization's digital security and device management capabilities by implementing Microsoft InTune and Entra. Microsoft InTune is a cloud-based service that allows us to remotely manage staff devices and applications securely. This includes deploying software, managing security policies, and ensuring that all devices comply with security standards. Microsoft Entra, formerly known as Azure Active Directory, will bolster our identity and access management. It provides a set of tools to manage user identities and regulate access to resources across our environment.

Major steps in the project include eliminating conflicting policies from Active Directory, configuring InTune administration, and setting up a framework for patch management

ICOLC Planning – January-May 2025

Aaron Skog, Executive Director

The International Coalition for Library Consortia (ICOLC) is hosting its meeting of the Americas in Chicago from May 4 through May 7, 2025. SWAN staff have volunteered to help with the conference planning and logistics. Other library consortia and systems such as CARLI, SHARE, and RAILS are participating. This has proven a valuable conference for us in the past due to its focus on collaboration and information exchange between library consortia like ours, so our involvement is a good step towards integrating further with this community.

Bibliographic Deduplication – Ongoing through May 2025

Cynthia Romanowski, Bibliographic Services Manager

Although bibliographic deduplication is an ongoing activity that is part of regular catalog maintenance, Cynthia is performing an aggressive targeted deduplication targeted to end this summer before we implement services with Backstage Library Works (detailed below.)

The project involves identifying potential bibliographic duplicates according to standard numbers and other bibliographic markers, evaluating whether the matching records are true duplicates or false positives, and resolving the situation accordingly. The types of records involved in the project defy automation due to the subtlety of the work.

The Bibliographic Services team is performing much of the work along with potential volunteer contributors from our OCLC Cataloging Libraries group.

Evaluation of 590 Decommissioning in Aspen – January-June 2025

Cynthia Romanowski, Bibliographic Services Manager

For many years, SWAN has relied on a local controlled vocabulary to identify formats in our bibliographic catalog. Much of the use of this vocabulary stems from past practices and the needs of a discovery layer that we no longer use. Cynthia plans to work with the Cataloging Working Group and our partners to re-evaluate the role of the 590 in the SWAN cataloging ecosystem to make a recommendation for its use going forward.

Currently, the 590 plays a role in identifying formats for pre-cats in Aspen and as a useful tool for browsing records in Symphony WorkFlows. Eliminating the 590 would free up the bibliographic field that most of the cataloging community outside SWAN uses for local catalog notes. Continuing use of the vocabulary would suggest a need to then re-evaluate the terms themselves to ensure they meet the needs of our users.

EBSCO Database Renewal – January-July 2025

Tara Wood, User Experience Manager

Now that EBSCO is managing the opt-in EBSCO Flagship package, they will handle the database selection and opt-in process in our stead. SWAN's role will be largely to facilitate communications with our member libraries. Major milestones for this project include seeing a finalized contract with EBSCO, the database selection process, coordinating authentication, and go-live. The package renews on July 1st.

Aspen Governance Task Force – Ongoing through June 2025

Aaron Skog, Executive Director

Aaron has spearheaded and has been facilitating this task force since Fall 2024. The group is tasked with creating a proposed governance model of the Aspen Discovery Project to ensure the long-term technical and financial sustainability of the software, its documentation, and its development. The task force consists of a dozen representatives from the Aspen user community and support teams. The ultimate goal of the task force is to provide a recommendation for a governance structure. The group itself does not intend to become the governing board. The group hopes to provide this recommendation by summer.

Online Patron Registration – January-July 2025

Tara Wood, User Experience Manager

SWAN has been evaluating tools for replace our homegrown online patron registration tool that has been in use since 2020. This is part of a larger initiative to move away from in-house developed tools due to the difficulty in maintaining them through Drupal updates. SWAN has two viable proposals: the Aspen online patron registration tool, or Patron Point.

The two tools have differences in cost and features, so it will be up to the membership to determine which path we choose. Budget approval at the March Quarterly meeting will be followed by configuration, a pilot phase, and rollout. Depending on the result, this rollout plan may go past July 2025. Once the budget is approved, we will map out a more precise timeline for this project.

SWAN Expo Planning – January-August 2025

Aaron Skog, Executive Director

The SWAN task force to plan our SWAN Expo began meeting in January to begin evaluating feedback from last year's event and making plans for this year. The event will once again take place at Moraine Valley Community College on August 22nd.

We have a session schedule developing with plans to solicit ideas and proposals from the membership for member-run presentations and roundtables. We expect this year's event to look much like previous years in terms of cost and experience.

We are also in talks with a new hosting venue for the 2026 conference.

AspenCon Planning – January-October 2025

Tara Wood, User Experience Manager

Tara is on the planning committee for this event, which will take place in Nashville, Tennessee from October 8-10. She has always been a key player in the Aspen community, and we're glad she is able to continue representing SWAN's commitment to improving this discovery platform. Aaron will also be presenting at the event on the Aspen Governance Task Force and its recommendations.

Palace Project & Hoopla Flex Research – February-September 2025

Tara Wood, User Experience Manager

SWAN plans to investigate a potential consortia-wide purchase of Palace Project, which includes both an e-reader platform and integration of e-content from various vendors such as Overdrive and Boundless. It also has a marketplace where individual libraries or the consortium could purchase e-content.

Hoopla Flex is a product that would supplement libraries' existing Hoopla collections and give libraries who do not currently have a subscription the opportunity to offer some Hoopla materials. This relies heavily on the development of integration into the Aspen catalog, which is something the Hoopla team assures us is a priority.

This is part of our ongoing endeavor to negotiate deals and discounts for e-resource materials on behalf of SWAN members. We are not yet aware of how viable a purchase of either product would be, but we will be researching the products and talking with their teams with a goal of providing a report and recommendation at the September Quarterly Meeting.

Learning Track Development – February-December 2025

Tara Wood, User Experience Manager

We are building out a framework to provide customized onboarding learning tracks geared towards new staff at SWAN member libraries. Initially using our existing trainings and documentation, we are devising a tagging scheme that will allow staff to choose their job roles (eg. cataloging, circulation, ILL, management) and receive a list of materials that will get them up to speed on the relevant SWAN topics as quickly as possible.

Not all trainings and documentation pages will be incorporated. Our goal is a checklist of early trainings that should alleviate some of the responsibilities of onboarding by department heads and managers. Our initial push is in the technical services realm, but we plan to expand into other topics once the framework is complete. We are also using this project to help evaluate gaps in our training offerings and identify where key information is buried in dense documentation or complicated training videos and courses.

Learning Track Development – March-July 2025

Tara Wood, User Experience Manager

Working with the Bibliographic Services and User Experience teams, we are exploring options to refine how “Library of Things” collections are represented in our online catalog. New features in the Aspen Discovery tool allow for certain types of materials to be limited to single-library profiles, much like e-resources are currently. We plan to evaluate the possibility of using this tool to limit visibility of some or all of these materials to the owning libraries only because they often do not transit, and it can be confusing for patrons to identify what items they do and do not have access to.

We will pursue this topic with our user groups and lay out a plan for libraries to opt in or out of a change in visibility. Libraries may have the option to selectively include certain types of item one way or another. We will present a plan in the fall.

MessageBee Training Update – April-May 2025

Scott Brandwein, Assistant Director

Unique Management Services has been gradually redesigning their user portal since summer of 2024. SWAN has been monitoring this rollout, but because of the constant rate of change, we have been waiting for some stability before rolling out new instructional materials. We are now at a point where a refresh of our training on MessageBee would be productive. This will incorporate navigation of the new user portal, updated template management tools, and new features added to SMS messaging.

No changes will be made to our notification schedules or staff-created templates.

Infographic on Value of SWAN Membership – April-June 2025

Aaron Skog, Executive Director

Aaron will compile statistics to demonstrate SWAN’s value to libraries in an easy-to-understand, visual infographic. The infographic will show the benefits of resource sharing, maintaining a shared platform, and collaboration using data regarding patron engagement, circulation, and cost savings

for libraries. The goal is to present this to the board and membership in late May or early June and more broadly in July.

Staff Development Retreat – April-September 2025

Scott Brandwein, Assistant Director

Building on the success of our 2024 staff retreat where we collaborated with HR Source on a CliftonStrengths evaluation and seminar, we are planning another day-long staff retreat for fall of this year. We would like to keep the thematic momentum going, focusing on the unique skillset of our staff, while honing it to a more practical application with the goal of improving our organization-wide customer service and support skills. We are reaching out to our partners and consortial colleagues for ideas and possible guest collaborators.

As part of this, we are also bringing our two newest employees hired in 2024 up to speed on CliftonStrengths and having them undergo the evaluation and consultations other staff did last year.

School Partnerships: Phase 2 – April-June 2025

Scott Brandwein, Assistant Director

Since last year, we have been working with three member libraries who have signed intergovernmental agreements with their local school districts to provide library services to all enrolled students. While the bulk of the work has been done, we need to debrief with these libraries to discuss successes and challenges of the projects. We also need to plot our plans for upcoming registrations for the 2025-2026 school years, during which we can apply what we learned to streamline the process.

Phase 2 of this project includes those consultations, and a final push to operationalize and document this work so any SWAN staff member can oversee a new partnership project in the future. We have recently spoken with two libraries who are in the early stages of negotiating IGAs with their local district. We plan to have this project finished before entering the planning phases for those additional schools. Success in this second phase will be a plan to incorporate student registration data for a number of school districts in a way that is scalable and consistent.

Backstage Library Works Crossover – May-June 2025

Cynthia Romanowski, Bibliographic Services Manager

Last year, our authority and bibliographic data vendor, MARCIVE, shut its doors. Upon notice that this would take place at the end of 2024, we did a scan of comparable options on the market and came up with only one viable alternative to continue receiving accurate authority records, bibliographic analysis, and automated enhancements and updates: Backstage Library Works. We had decided to forego an immediate transition in favor of fitting the new contract into the 2026 fiscal year budget.

This project involves three major milestones: 1) an initial data export and analysis by Backstage to sync our bibliographic and authority records with their internal systems, 2) an initial import of

enhanced bibliographic records and authority data that will include the necessary updates to compensate for the six months we will have been without service, and 3) establishing monthly updates that will be similar to the service we previously received from MARCIVE.

Performance Reviews – May-June 2025

Scott Brandwein, Assistant Director

This project is simply our annual staff evaluation plan and compensation adjustments for the new fiscal year. We are not making any changes to our review process for this year, so we expect this will go smoothly as is has in years past. It is included on this list because of the time commitment required of administrative- and management-level staff over the two months.

HaloITSM: Phase 2 – July-August 2025

Scott Brandwein, Assistant Director

By July, we will have been on our new ticketing system for just over two months. Once the dust has settled and both SWAN staff and our membership have gotten used to the platform, we would like to conduct an evaluation of how it has been performing. We will survey internal staff and the membership to determine if there are any configuration or workflow changes we can make to improve their experience and effectiveness on the system.

This will also be an opportunity to look at a list of tools within HaloITSM that we have decided not to launch with, including a Q&A and knowledge base platform that has potential for internal SWAN documentation.

Strategic Planning – June-December 2025

Aaron Skog, Executive Director

SWAN is currently operating without a strategic plan. Our previous strategic plan encompassed the years 2019-2023. Now that the Environmental Scan Task Force has completed its work and the Platform Survey results are coming in and will be synthesized, we can begin work on this plan in earnest. We hope to accomplish this strategic plan internally with help from the board and membership. We do not believe an external consultant will be necessary for success.

Strategic Planning – June-December 2025

Ian Nosek, IT & System Support Manager

In the second half of this year, we have budgeted for a laptop refresh for SWAN staff. Ian will begin researching options for capable and affordable options once some other projects begin to taper off this summer. We are giving ourselves a comfortable timeline to select a vendor and model, place an order, configure the hardware, and distribute the machines to staff. Our last laptop refresh took place from July of 2020 to March 2021, though the long timeline was largely due to supply chain issues related to the pandemic. This year's refresh should be easier.

SharePoint File Management Overhaul – September-December 2025

Scott Brandwein, Assistant Director

Our internal file management configuration could benefit from an update. We currently use a single SharePoint portal for nearly all SWAN internal file management and have experienced occasional issues with file syncing and organization. In response, we plan to perform an evaluation of our current setup and implement some changes to our internal document management processes as well as the infrastructure on which it is built.

In late 2024, we did some initial research on optimizing SharePoint and began testing some changes to our framework. That project got sidelined by more pressing responsibilities, so this initiative in the fall will pick up where we left off last year.

SWAN

Membership Satisfaction with SWAN Platform: preliminary survey results

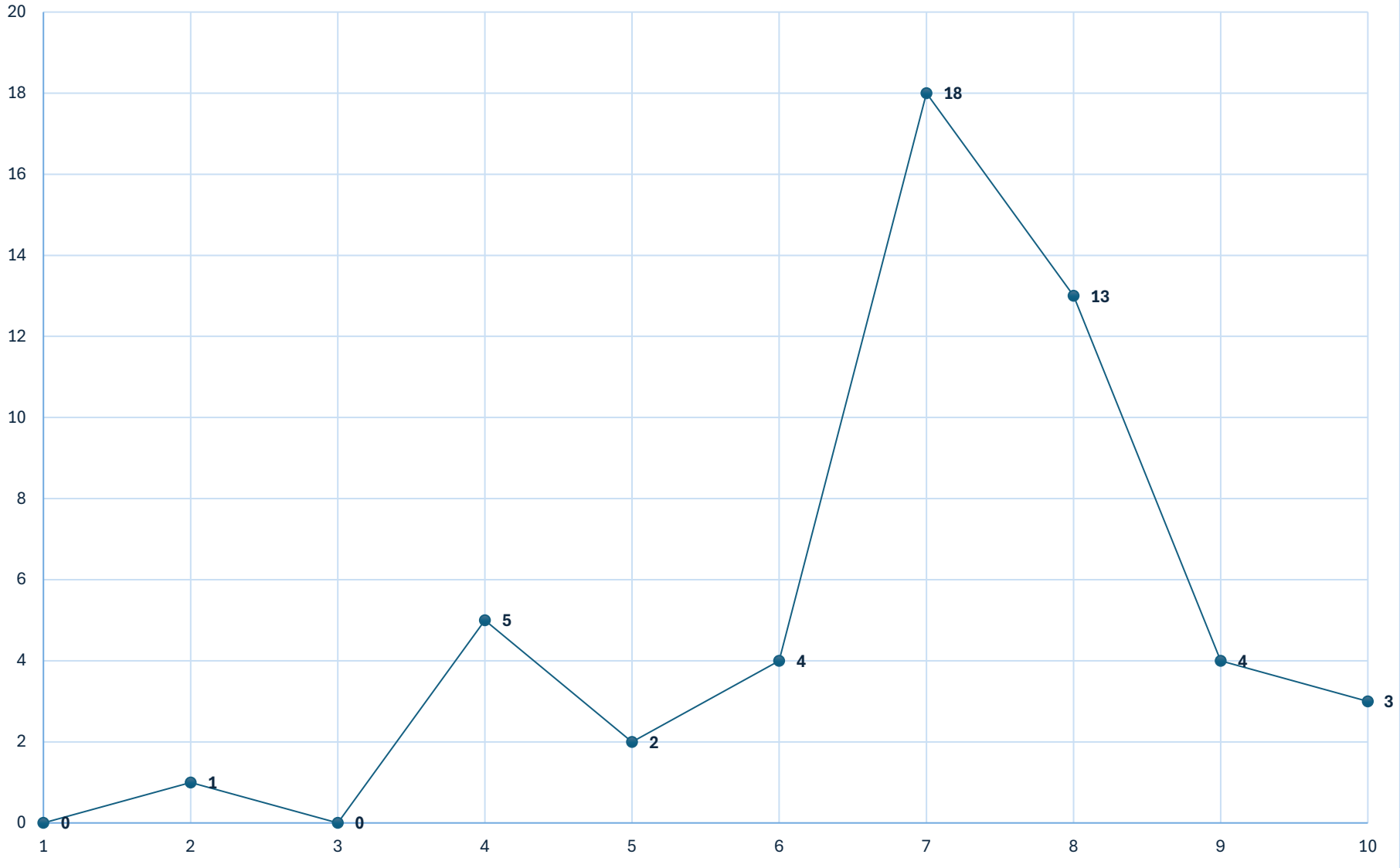
2025

Aaron Skog
3-18-2025

Introduction

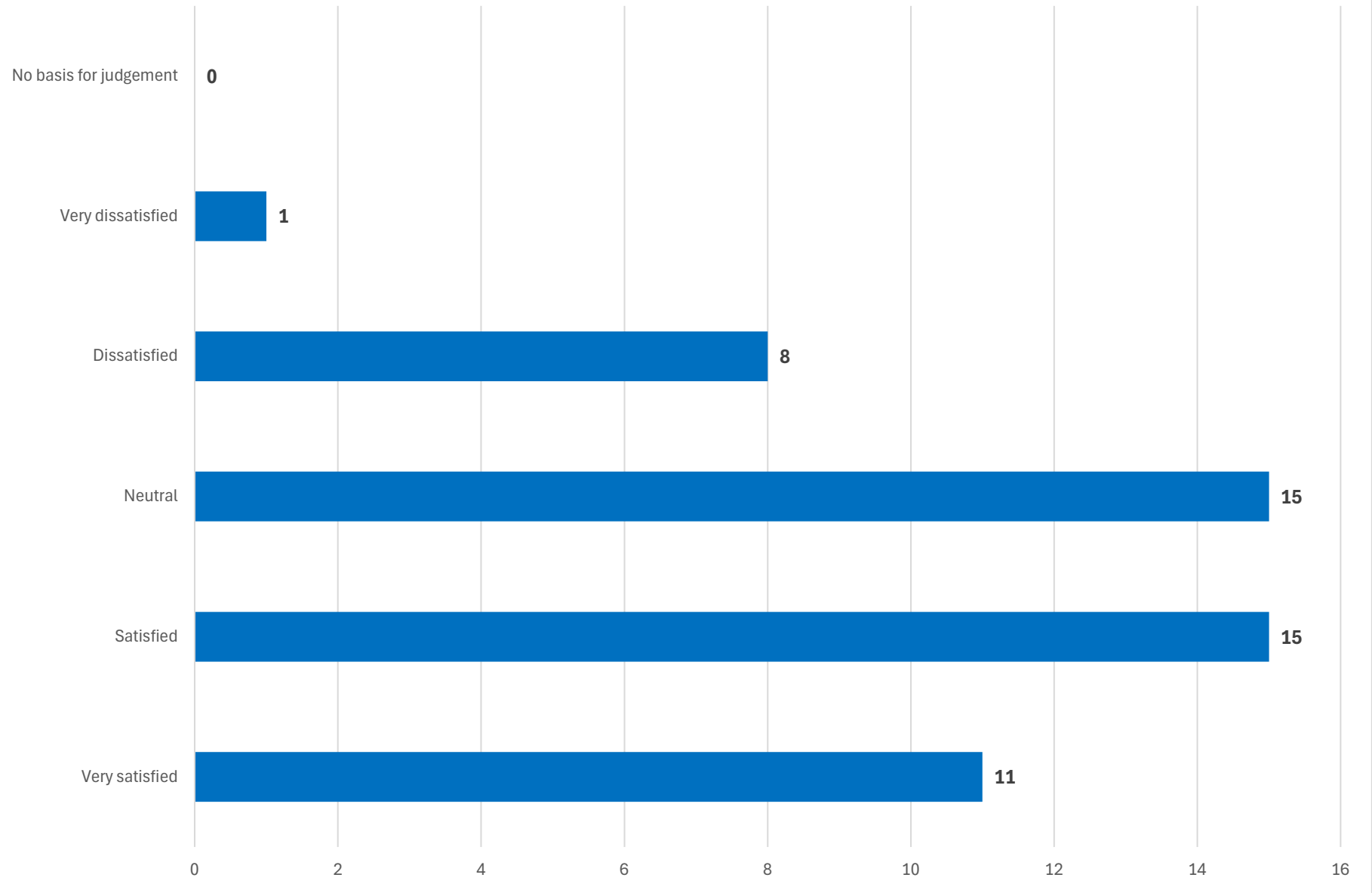
The survey deadline has been extended to Friday, March 21, 2025. These are the preliminary results as of Monday, March 17, 2025.

Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well



<p>Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? :</p> <p>Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well</p>	<p>Membership Ranking Counts</p>	<p>% of total</p>
1	0	0%
2	1	2%
3	0	0%
4	5	10%
5	2	4%
6	4	8%
7	18	36%
8	13	26%
9	4	8%
10	3	6%
	50	100%

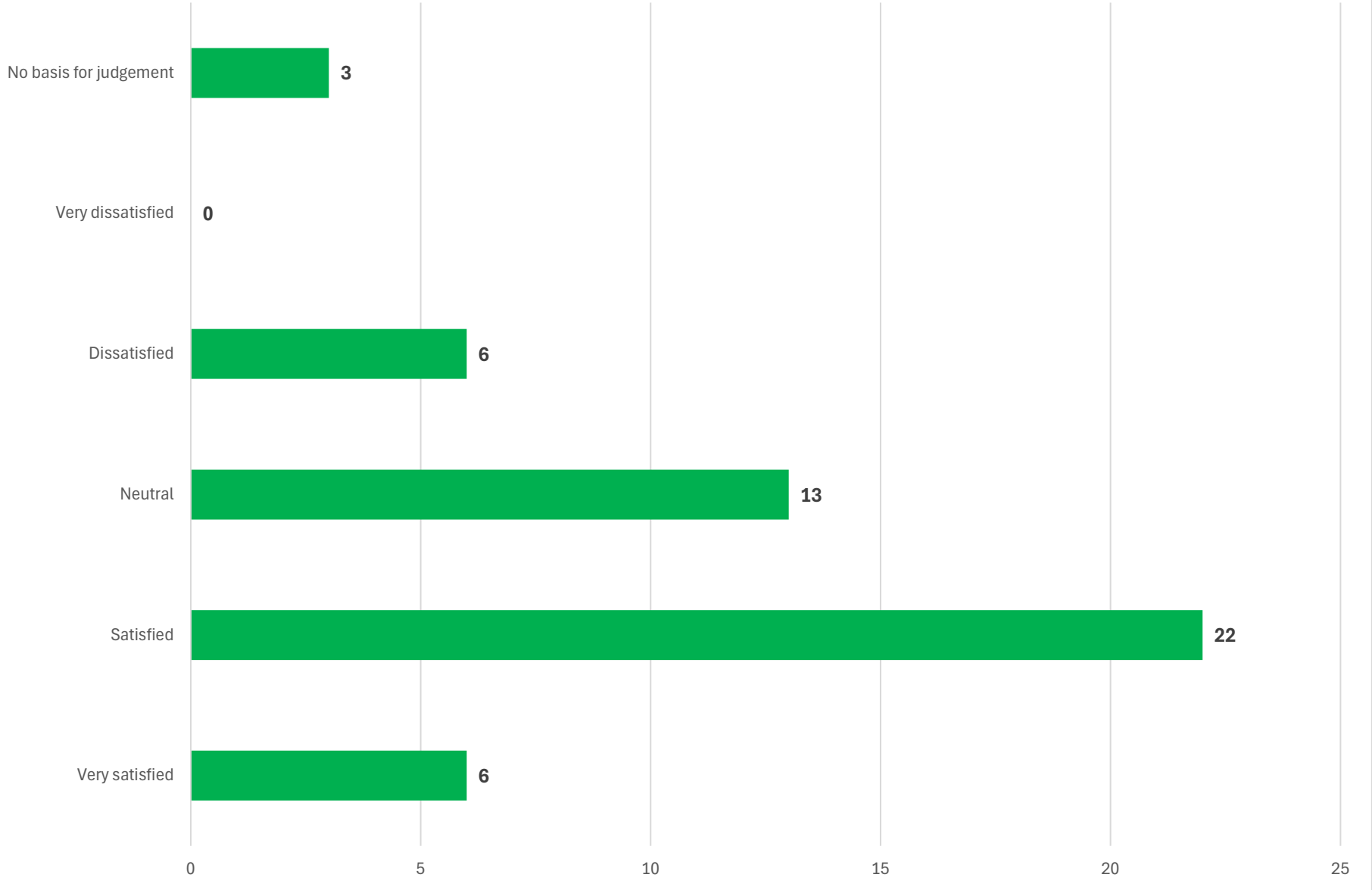
**Please rate your satisfaction with each of the following products:
WorkFlows -- Staff client from SirsiDynix**



**Please rate your satisfaction with each
of the following products: WorkFlows -- Response**

Staff client from SirsiDynix	Counts	WorkFlows
Very satisfied	11	22%
Satisfied	15	30%
Neutral	15	30%
Dissatisfied	8	16%
Very dissatisfied	1	2%
No basis for judgement	0	0%
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	50	

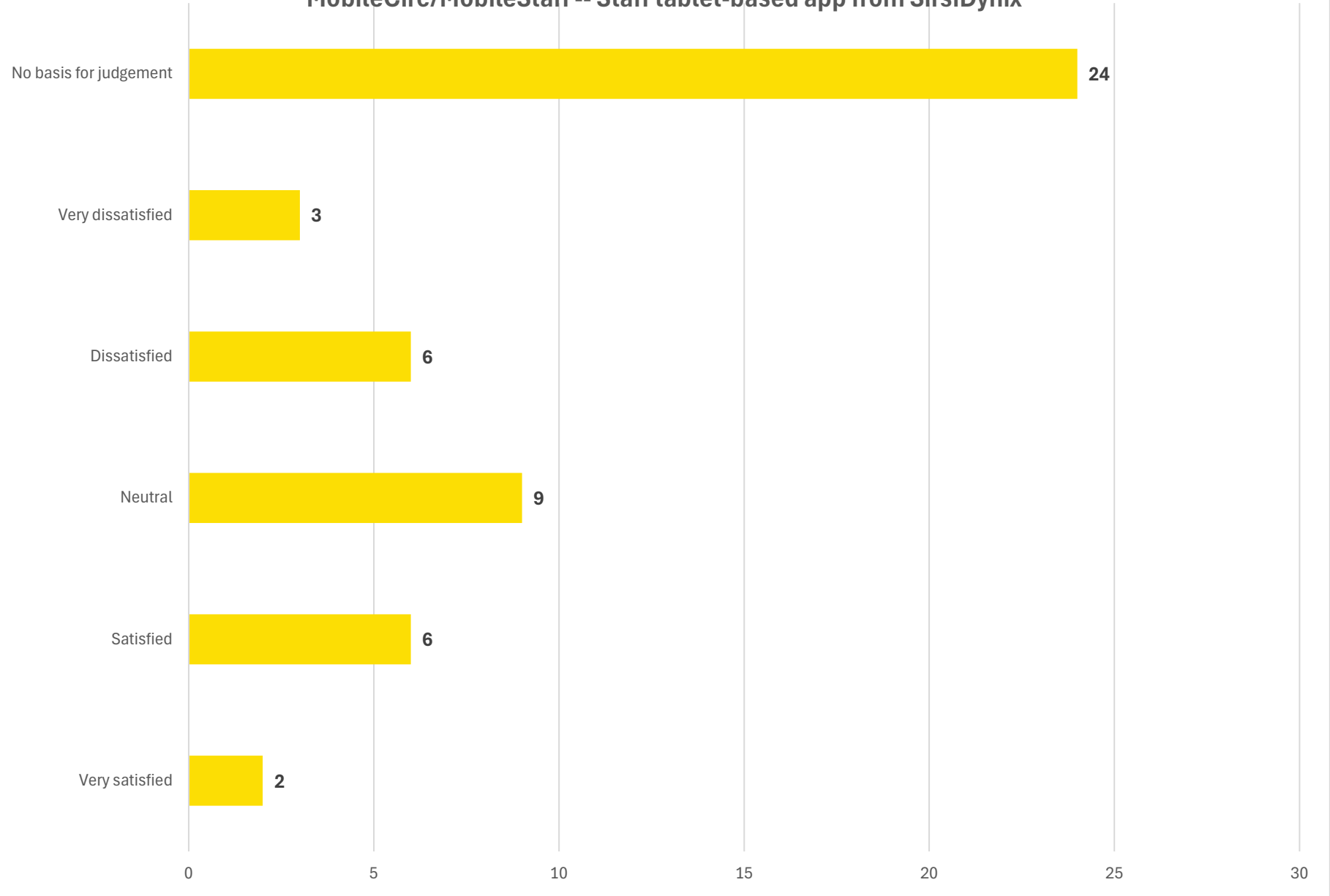
**Please rate your satisfaction with each of the following products:
BLUEcloud Analytics -- Data analysis and reporting from SirsiDynix**



Please rate your satisfaction with each of the following products: BLUEcloud

Analytics -- Data analysis and reporting from SirsiDynix	Response Counts	BLUEcloud Analytics
Very satisfied	6	12%
Satisfied	22	44%
Neutral	13	26%
Dissatisfied	6	12%
Very dissatisfied	0	0%
No basis for judgement	3	6%
<hr/>		
	50	

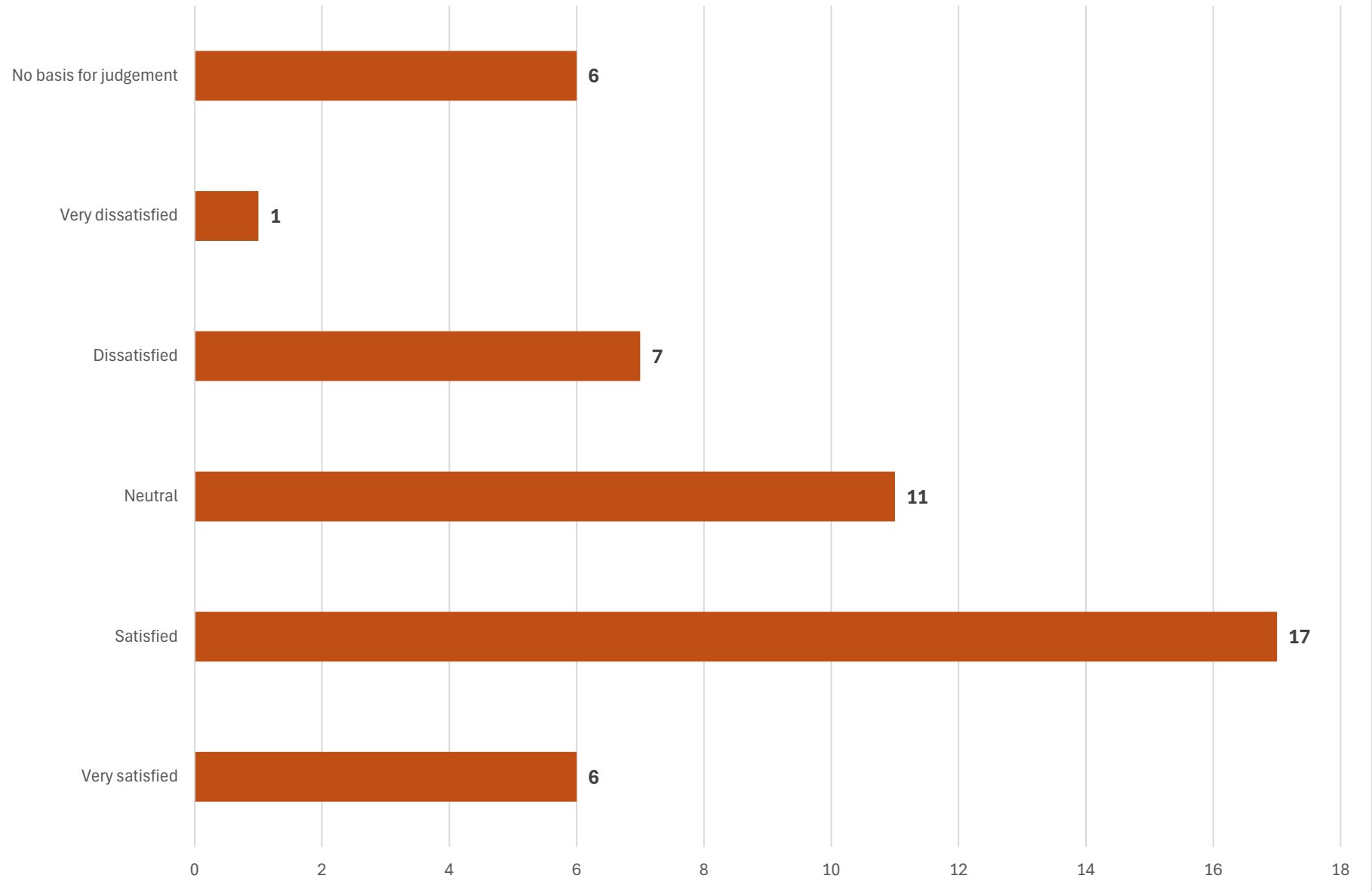
**Please rate your satisfaction with each of the following products:
MobileCirc/MobileStaff -- Staff tablet-based app from SirsiDynix**



Please rate your satisfaction with each of the following products:

MobileCirc/MobileStaff -- Staff tablet-based app from SirsiDynix	Response Counts	MobileCirc
Very satisfied	2	4%
Satisfied	6	12%
Neutral	9	18%
Dissatisfied	6	12%
Very dissatisfied	3	6%
No basis for judgement	24	48%
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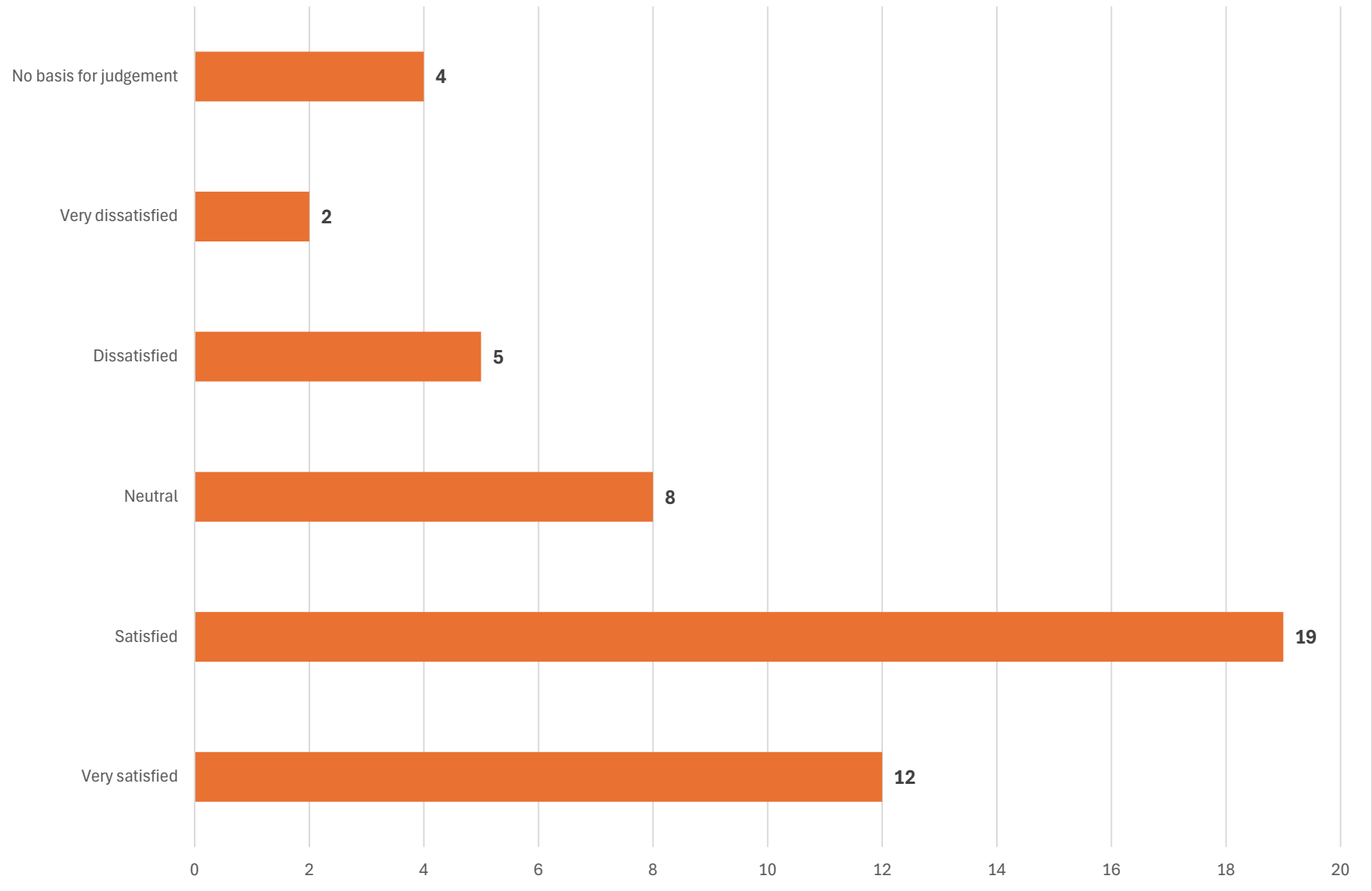
**Please rate your satisfaction with each of the following products:
LiDA -- Library Discovery App, aka SWAN Libraries + mobile application**



**Please rate your satisfaction with each
of the following products: LiDA --**

Library Discovery App, aka SWAN Libraries + mobile application	Response Counts	LiDA
Very satisfied	6	13%
Satisfied	17	35%
Neutral	11	23%
Dissatisfied	7	15%
Very dissatisfied	1	2%
No basis for judgement	6	13%
<hr/>		48

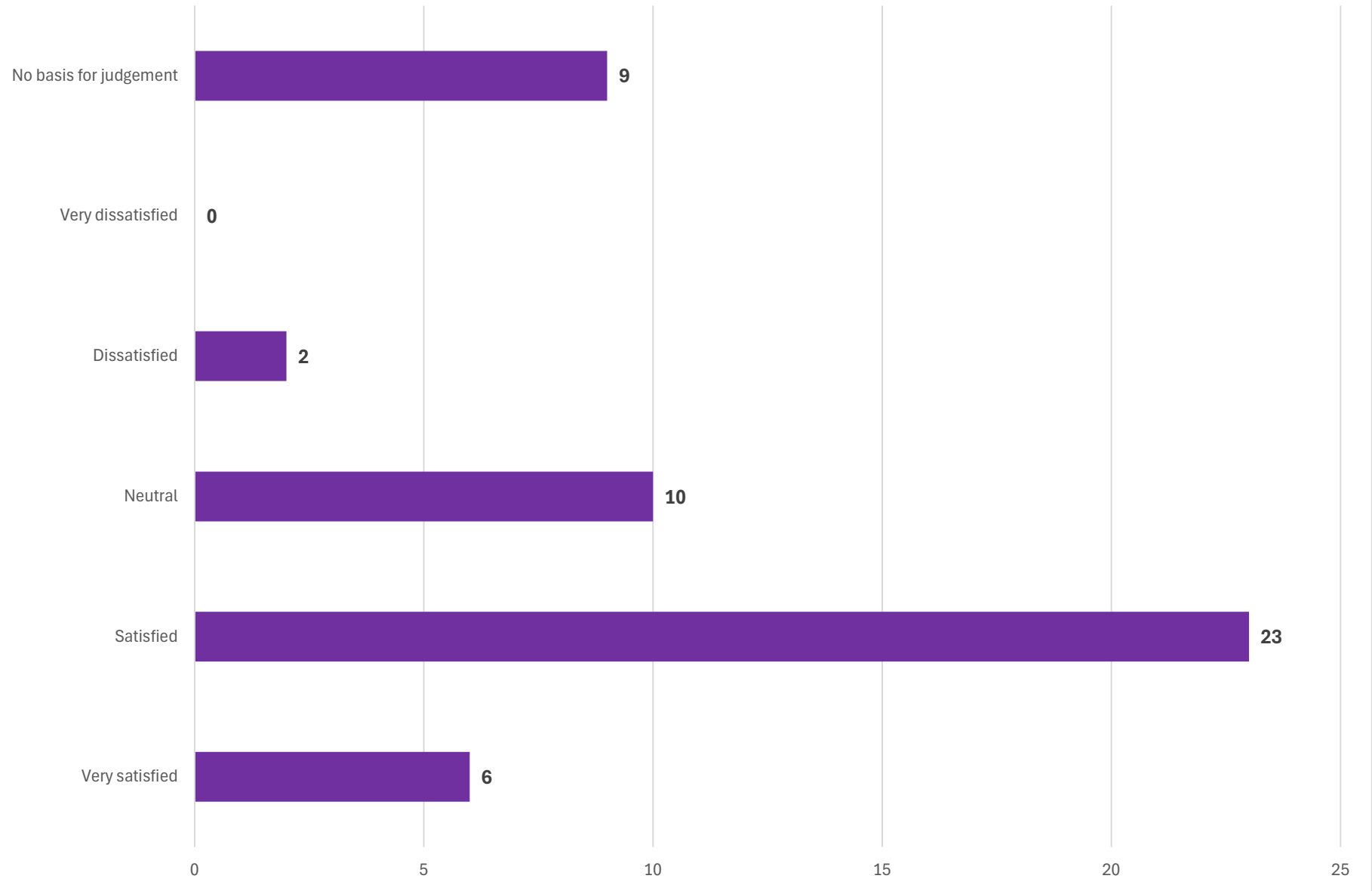
**Please rate your satisfaction with each of the following products:
Aspen Discovery -- SWAN OPAC supported and developed with ByWater Solutions**



**Please rate your satisfaction with each
of the following products: Aspen**

Discovery -- SWAN OPAC supported and developed with ByWater Solutions	Response Counts	Aspen
Very satisfied	12	24%
Satisfied	19	38%
Neutral	8	16%
Dissatisfied	5	10%
Very dissatisfied	2	4%
No basis for judgement	4	8%
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	50	

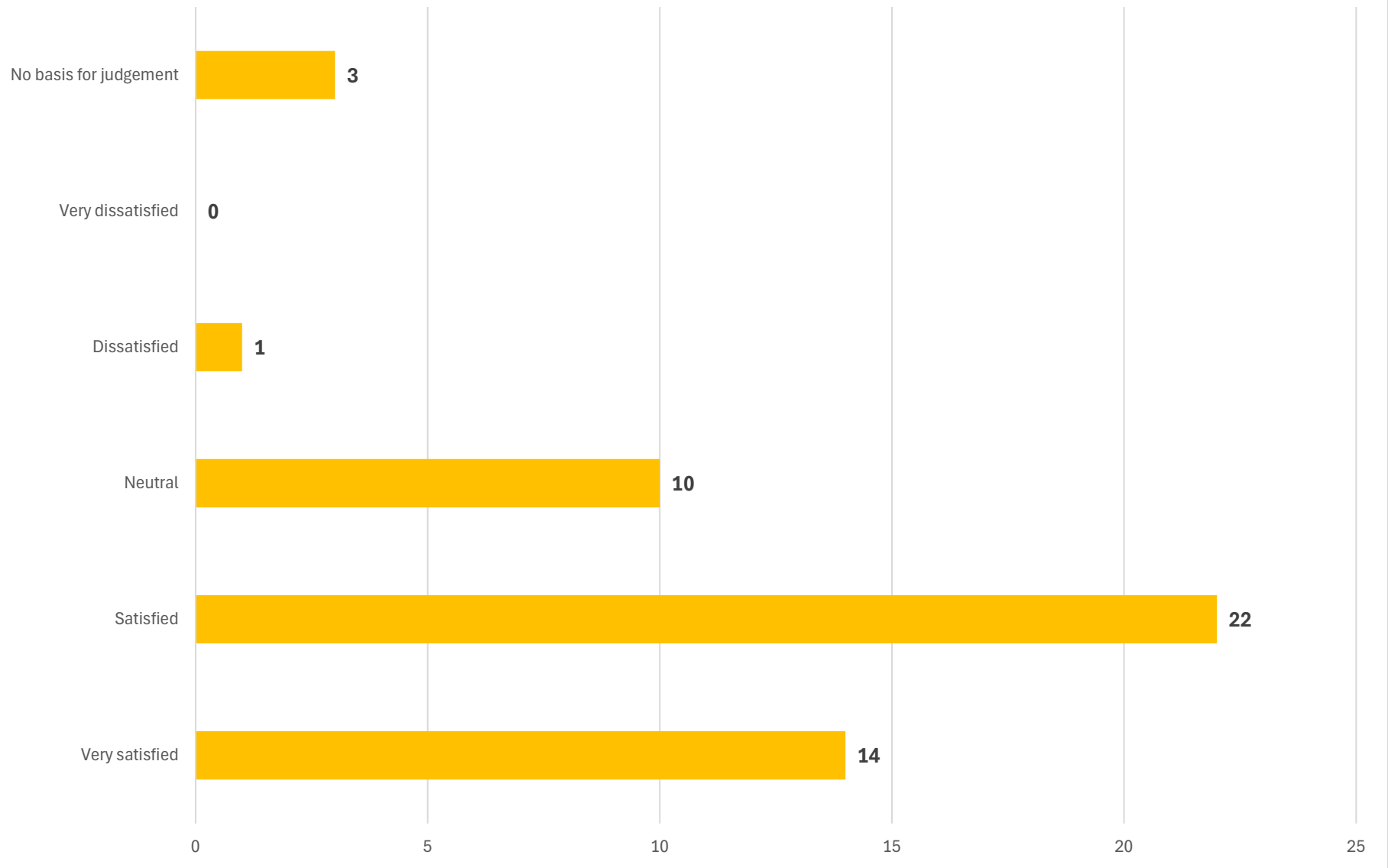
**Please rate your satisfaction with each of the following products:
MessageBee -- Notification platform with Unique Management Solutions**



Please rate your satisfaction with each of the following products: MessageBee ·

- Notification platform with Unique Management Solutions	Response Counts	MessageBee
Very satisfied	6	12%
Satisfied	23	46%
Neutral	10	20%
Dissatisfied	2	4%
Very dissatisfied	0	0%
No basis for judgement	9	18%
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**Please rate your satisfaction with each of the following products:
WorldShare ILL & WorldCat Discovery -- OCLC group-services for Illinois libraries, managed by
SWAN**



Please rate your satisfaction with each of the following products: WorldShare ILL & WorldCat Discovery -- OCLC group-services for Illinois libraries, managed by SWAN

	Response Counts	OCLC
Very satisfied	14	28%
Satisfied	22	44%
Neutral	10	20%
Dissatisfied	1	2%
Very dissatisfied	0	0%
No basis for judgement	3	6%
	50	

Participating Libraries

1. Acorn Public Library District
2. Addison Public Library
3. Beecher Community Library District
4. Berkeley Public Library
5. Bloomingdale Public Library
6. Blue Island Public Library
7. Bridgeview Public Library
8. Calumet City Public Library
9. Chicago Ridge Public Library
10. Crestwood Public Library District
11. Downers Grove Public Library
12. Elmwood Park Public Library
13. Elmwood Park Public Library
14. Flossmoor Public Library
15. Frankfort Public Library District
16. Geneva Public Library District
17. Glenside Public Library District
18. Glenwood-Lynwood Public Library District
19. Green Hills Public Library District
20. Hinsdale Public Library
21. Homewood Public Library
22. Homewood Public Library District
23. Indian Prairie Public Library District
24. Itasca Community Library
25. Justice Public Library District
26. Kaneville Public Library District
27. La Grange Park Public Library District
28. Lansing Public Library
29. Linda Sokol Francis Brookfield Library
30. Melrose Park Public Library
31. Midlothian Public Library
32. Northlake Public Library District
33. Oak Brook Public Library
34. Oak Lawn Public Library
35. Oak Park Public Library
36. Park Forest Public Library
37. Prairie Trails Public Library District
38. River Forest Public Library
39. River Grove Public Library
40. Schiller Park Public Library
41. Steger-South Chicago Heights Public Library District
42. Theosophical Society in America
43. Thomas Ford Memorial Library
44. Thornton Public Library
45. Tinley Park Public Library
46. Town and Country Public Library District
47. Villa Park Public Library
48. Warrenville Public Library District
49. Westmont Public Library
50. Worth Public Library District

Membership Satisfaction with SWAN Platform: survey results

Library	Acorn Public Library District
Name	Dorothy Koll
Date submitted	3/12/2025 12:06:19 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Very satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	We are quite dissatisfied with the search functionality in Workflows. It also feels clunky, unintuitive, and challenging to train staff on. We love LIDA, the app is great.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	We are satisfied with most products that SWAN provides. BlueCloud analytics can be difficult to use but SWAN staff always provide clear instructions on how to find what we need. We love the LIDA app.
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.	The search features in Workflows are outdated. While searching and placing holds in ASPEN is always an option, it's frustrating to have to use a separate application. Workflows is older software that isn't intuitive for our younger employees, and it often takes at least 6 months for them to feel comfortable using it, and years to master it.
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Membership Satisfaction with SWAN Platform: survey results

Library	Addison Public Library
Name	Mary Medjo Me Zengue
Date submitted	3/5/2025 12:25:54 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Neutral
LiDA rating	Neutral
Aspen rating	Very dissatisfied
MessageBee rating	Neutral
OCLC rating	Very satisfied
Your comments on rating	<p>Workflows:</p> <p>Rating â€œ Neutral; works well for circulation functions but limited functionality w/cataloging.</p> <p>BLUEcloud Analytics:</p> <p>Rating â€œ Satisfied; there are a good amount of reports and SWAN will create reports for us that we need. The reason it is not very satisfied is that we canâ€™t customize our own reports.</p> <p>MobileCirc/MobileStaff:</p> <p>Rating â€œ Neutral; Guest Services uses on a limited basis for pulling expired/canceled holds. Community Engagement uses it more and everything works well except they are not able to place holds. (updated rating after speaking to Gaby)</p> <p>LiDA:</p> <p>Rating â€œ Neutral; the app is slow and crashes. Patrons have expressed frustration with slow loading or not loading at all. Patrons are happy with the digital card and when the app loads that works well.</p> <p>Aspen Discovery:</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>Rating “ Very Dissatisfied; this rating is due to the amount of ongoing issues, it is slow, crashes, unexpected issues crop up such as Checkout History going missing. Issues with API configuration with 3rd party vendors such as Cloud library titles going missing and Boundless titles not currently integrating. This is not a stable platform for patrons or staff. We did not have these issues with our previous catalog.</p> <p>MessageBee:</p> <p>Rating “ Neutral</p> <p>The daily failure reports are helpful. Patrons are not happy they don’t get notified when an item auto-renews. They still complain about this.</p> <p>WorldShare ILL & WorldCat Discovery:</p> <p>Rating “ Very Satisfied</p>
<p>Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well</p>	<p>6</p>
<p>For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.</p>	<p>See above</p>
<p>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.</p>	<p>See above</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Beecher Community Library District
Name	Jill Grosso
Date submitted	2/26/2025 3:15:19 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Dissatisfied
Aspen rating	Neutral
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	<p>LIDA App: it should load faster and some patrons get logged out every day or after every update. We would seriously like the patrons being logged out problem solved. We like placing holds via Masquarade mode.</p> <p>We would like the EBSCO ebooks removed from our catalog - it creates too much confusion.</p> <p>We wish the grouped items could be a little better. There are a lot of items that aren't grouped.</p>
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Berkeley Public Library
Name	Ryan Cox
Date submitted	3/13/2025 11:43:03 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Satisfied
LiDA rating	Neutral
Aspen rating	Neutral
MessageBee rating	Neutral
OCLC rating	Neutral
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Bloomington Public Library
Name	Tim Jarzemsky
Date submitted	3/13/2025 4:42:55 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Neutral
LiDA rating	Satisfied
Aspen rating	Neutral
MessageBee rating	Neutral
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	9
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.	<p>Workflows - is an old and clunky product - it is reliable which is nice, but the amount of steps staff have to take for basic processes is cumbersome.</p> <p>Work on the the uptime/reliability of SWAN Libraries + mobile application, it is clunky and slow and It times out frequently and requires patrons to log in again.</p> <p>For Aspen the recent bot issues included, there have been several large issues over the past year that have required that major features be disabled, such as Hoopla integration. As we continue to grow with this platform, these periods of extended downtime need to be addressed.</p> <p>MessageBee - There have been several instances of carrier-rejected SMS text issues.</p>

Membership Satisfaction with SWAN Platform: survey results

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Membership Satisfaction with SWAN Platform: survey results

Library	Blue Island Public Library
Name	Anna Wassenaar
Date submitted	3/4/2025 10:29:31 AM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Dissatisfied
OCLC rating	Neutral
Your comments on rating	While some of these products have some bugs, staff have learned work arounds.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	The Lida app seems to be down a lot-would be nice if read-alikes were available on Lida as they are through Aspen. Patrons seem very happy with this app. Aspen is a far superior interface, although staff still miss information about where a patron might be in a hold queue.
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.	Blue Cloud analytics is difficult to navigate for staff, with staff questioning whether reports are pulling from the fields/data points that they think they are. MessageBee error messages are filled with IT jargon that staff have difficulty understanding.
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Membership Satisfaction with SWAN Platform: survey results

Library	Bridgeview Public Library
Name	Chris Sebuck
Date submitted	3/7/2025 10:23:55 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	Dissatisfied
LiDA rating	Very satisfied
Aspen rating	Neutral
MessageBee rating	Neutral
OCLC rating	Very satisfied
Your comments on rating	<p>Would love to customize or streamline workflows wizards to remove tasks we are not using. Lot of waste there. Clunky interface.</p> <p>Blue Cloud reporting is dense and obtuse and hard to use. There seems to be many ways to run a report and then you get different responses. Seems like this could be easier. Standardize the reporting structure so that all we have to do is put BVS in to pull the data. By now you can see what people are running reports on. Standardize those. Like you did for IPLAR and the ILL Survey reporting - Beautiful! Thank you!</p> <p>My time working with it was so frustrating, I delegated all reports down to my Assistant Director and she isn't that thrilled either. Probably not the best person to comment since I'm done trying. Some reports seem easy and straightforward and give you the data you are expecting. Some do not. Also, how long are we going to break out Legacy Circulations in those weeding reports? We've had Blue Cloud Analytics for way over 5 years now, probably longer. Streamline that report especially. Mobile Circulation is clunky and not robust in the field. Again, if we could customize or streamline or edit those boxes and tabs each library may not be using in patron registration, from both the wizard and the mobile app, things would be a ton faster</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>when registering patrons. People don't want to wait more than 10 minutes to have a card made, especially out in the field. Get that streamlined. There are so many tabs nobody is using. EDIT. Message Bee and Aspen seem fine. I have not spent much time investigating what Message Bee can do for us. Not sure what to do with the daily reports that are sent to the AKA emails. I'm sure I missed a training, so if I ever have time, I'll circle back. I use the LiDA app almost exclusively over the Aspen catalog. I know others appreciate the Aspen catalog customization. It isn't that important to me. I don't have time or staff to keep updating the catalogue with messaging or any other bells and whistles so I can't really add anything to this conversation because I pretty much use the standard iteration. LOVE the app! Even the old one, but I don't have an iPhone so that is probably why. WorldCat is fine. No improvements, it works great.</p>
<p>Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well</p>	<p>4</p>
<p>For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.</p>	<p>Love the LiDA app!!!!!!!!!!!!!! It's straightforward. Does what it's supposed to. You can see what you are putting on hold. Interface is pretty clean. Fast and accurate. No clutter. Aspen could use some of this spunk. There is a lot going on. To use Aspen you really need to be on a computer desktop or laptop to get the benefit of what it pulls. This is another place where we are trying to be all things to all people. Most every library has a dedicated website. We don't need all these options in our catalog. Need an eBook - here, need a message about a snow closure from your library - here, need to find a database - here, does your library</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>have this book? - click here or here or here. I suppose people are downloading their eBooks straight from the catalog, but if you download the eBook hosting app, that is way more efficient. I've never had a patron ask to do that- download straight from the catalog. And I work out on the floor every day, I'm not just locked in the office. I have daily patron contact and I'm hyping the apps to them when they sign up for a card. Face of the library! They want phone access or tablet access. Since we are now starting to see that most people we are dealing with day to day are not even sure what the desktop computers we have for patron use are for, since they've only ever had a tablet or phone in their computing lives, this seem like a lot of effort for no reason. We are almost at the tipping point where people will have never used a desktop computer. Chrome books, phones, tablets, yes. Touch screen - absolutely! Desktop computers with keyboards and mice, not so much. We have gone from having 30 busy computers for patrons to use down to about 18 and nobody has complained that they can't get on a computer. Most of our time is spent dealing with people doing everything on their phones or tables. I have downloaded an eBook from the LiDA app search to the Libby app in like no time flat. I did 14 of them while I was on the tarmac at Midway for and hour trying to get to San Diego in January using the WiFi connection from the airport building since the WiFi on the plane was down. That was something! Keep that coming!</p>
<p>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.</p>	<p>See above. I'm not tech savvy enough to "share attempted solutions". I just usually stop using the product or delegate down. Best advice I can give, work on apps! More apps please! The Mobile Circ app is bad. Make it work like LiDA.</p>

Membership Satisfaction with SWAN Platform: survey results

	Hope this helps! :)
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Membership Satisfaction with SWAN Platform: survey results

Library	Calumet City Public Library
Name	Rita Mayfield
Date submitted	3/7/2025 12:53:18 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	No basis for judgement
LiDA rating	No basis for judgement
Aspen rating	No basis for judgement
MessageBee rating	Neutral
OCLC rating	Neutral
Your comments on rating	Blue Swan is not user friendly, need ability to access reports in an easier manner. Would like more info on the mobile apps, not familiar
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	4
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Circ staff have stated that apps are not helpful, difficult to navigate and more access to training is needed.
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Chicago Ridge Public Library
Name	Dana Wishnick
Date submitted	3/3/2025 11:33:34 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Dissatisfied
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Crestwood Public Library District
Name	Dan Powers
Date submitted	3/4/2025 10:03:04 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	While we have been satisfied with the MessageBee service and do not experience issues with the system, a comment that we frequently receive from patrons is that they miss the previously provided renewal notice for their checked out items that they would receive in their emails.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Downers Grove Public Library
Name	Julie Milavec
Date submitted	3/14/2025 10:01:52 AM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Neutral
LiDA rating	Satisfied
Aspen rating	Very satisfied
MessageBee rating	Very satisfied
OCLC rating	Neutral
Your comments on rating	For Workflows, the general feeling is you just trade the shortcomings you know for a new set of shortcomings you don't know. Did note lack of accessibility of tasks between modules and lack of QR code recognition in WF. Pretty meh on everything but Aspen, Lida, and Message Bee.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	6
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Elmwood Park Public Library
Name	Gaby Salgado
Date submitted	3/13/2025 3:00:54 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Neutral
LiDA rating	Satisfied
Aspen rating	Very satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>We have yet to take full advantage of MessageBee but plan to do so in the near future.</p> <p>The new SWAN Libraries + app is an improvement from the previous app but we are still trying to get our patrons on board with using it with more frequency.</p>
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.	<p>There have been quite a few instances in recent months in which staff and patrons had issues accessing Aspen.</p> <p>We have not yet used the updated MobileCirc but hope to do so once we have improved iPads.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Elmwood Park Public Library
Name	Michael Consiglio
Date submitted	3/14/2025 6:22:58 AM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	No basis for judgement
MobileCirc rating	No basis for judgement
LiDA rating	No basis for judgement
Aspen rating	No basis for judgement
MessageBee rating	No basis for judgement
OCLC rating	No basis for judgement
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	10
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Flossmoor Public Library
Name	Jamie Paicely
Date submitted	3/7/2025 10:37:47 AM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Very dissatisfied
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Neutral
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
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.	MobileCirc is slow and burdensome to work with. Therefore we have just given up trying to work with it because there's not enough Advil for all our headaches.
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Membership Satisfaction with SWAN Platform: survey results

Library	Frankfort Public Library District
Name	Amanda Kowalcze
Date submitted	3/11/2025 4:52:29 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Dissatisfied
LiDA rating	Neutral
Aspen rating	Neutral
MessageBee rating	Very satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>BCA- Good reports in BCA. App- You shouldn't have to click "where is it" to display the owning libraries. That information should be automatically displayed on the screen after you search for the title. Very slow loading. "The Swan Libraries app has frozen on me quite a bit, particularly when I try to scan my library barcode from my phone to check out books, whether it is on my work computer or at one of the self-serve check out kiosks."</p> <p>Aspen- Search filters could be more exact (often a lot of unnecessary excess to wade through). Conversely, boolean search of aspen requires a literal title search word for word. "Just today, I had to look for Me and Mister P. I put Mr as opposed to Mister, and the book did not show up. It should not be that difficult to get that book. Or if I use the wrong article word, the book does not show. They really need to make the search engine less specific, or else people, and librarians, will get frustrated when looking</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>for books." "My issue has been if there is an ampersand in the title and I use the word 'and' and vice versa."</p> <p>Aspen- "Wish there was an easier process to add spotlight collections to our Youth and Teen tab in Aspen. I feel like I have to re-teach myself the steps every time I do it."</p>
<p>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.</p>	<p>Mobile Staff- Clunky to use. Always has been.</p> <p>Workflows- Clunky, not intuitive. No way to easily retrieve previously entered information, no "back button" or hot links to click through to other information that could be displayed on another screen.</p> <p>Would love to have the chance to explore other products because Workflows seems very outdated.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Geneva Public Library District
Name	Janet Miranda
Date submitted	3/13/2025 11:34:42 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Very dissatisfied
LiDA rating	Satisfied
Aspen rating	Very satisfied
MessageBee rating	Neutral
OCLC rating	Very satisfied
Your comments on rating	<p>We have mixed views of WorkFlows. Tech services and IT are satisfied with the product yet our Public Services and Customer Services Teams find that it is not "user friendly", searches can return useless results, and 3-letter library codes for 100 libraries are not useful for staff because it takes additional time to look up the codes. Frontline staff prefer using Aspen and are very satisfied with Aspen.</p> <p>The Outreach Team stopped using Mobile Circ due to difficulty with checking out materials with this product.</p>
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Aspen is easy to use, grouped records are wonderful and patrons report enjoying the NovelList integration. Also, the linked account feature and check out history are a bonus.</p> <p>BCA is very useful. Staff report interest in more training for this tool.</p> <p>WorldShare ILL and WorldCat Discovery are easy to use, updated frequently and have a good support staff. SWAN training has also benefited the usefulness of this product.</p>
For the products for which you indicated dissatisfaction, please provide detailed feedback	Message Bee is not user friendly. Perhaps staff training could help.

Membership Satisfaction with SWAN Platform: survey results

on which features of which products you find problematic. Where appropriate, please attach screenshots and share attempted solutions.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Glenside Public Library District
Name	Pamela Kamin
Date submitted	3/11/2025 12:09:12 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Neutral
Aspen rating	Very satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	Overall, we are satisfied with WorkFlows, but there's room for improvement. In the Manage Hold Shelf wizard, we can filter results by active, cancelled, expired, and suspended, but the filter doesn't carry over when printing the list -- it prints all results instead. There are also a few glitches that still need attention, such as when you cancel a prompt to transit an item, its status changes to "onshelf" at the owning library instead of canceling the action and retaining its original status.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	We're very satisfied with BlueCloud Analytics. It's incredibly convenient to run reports whenever we need them. The pre-built reports from SWAN staff have been extremely helpful, and it's reassuring to know that SWAN staff can also customize reports for us through a quick help ticket. Aspen Discovery is already fantastic, and each update keeps making it better. The search results are intuitive, and Masquerade Mode is a really helpful feature when assisting patrons.
For the products for which you indicated dissatisfaction, please provide detailed feedback on which features of which products you find	The new LiDA app isn't much of an improvement over the previous version. We've gotten a lot of feedback, with many users saying the app is slow to load and

Membership Satisfaction with SWAN Platform: survey results

problematic. Where appropriate, please attach screenshots and share attempted solutions.	often logs them out, forcing them to log back in. This undermines one of the main goals of the app, which was to make the checkout process easier. A lot of users can't rely on it as a substitute for their library card, which is how we originally marketed it for those who tend to forget their physical cards.
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Membership Satisfaction with SWAN Platform: survey results

Library	Glenwood-Lynwood Public Library District
Name	Brian Vagt
Date submitted	3/13/2025 11:32:28 AM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	No basis for judgement
MobileCirc rating	Very satisfied
LiDA rating	No basis for judgement
Aspen rating	Very satisfied
MessageBee rating	No basis for judgement
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	10
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Green Hills Public Library District
Name	Jane Jenkins
Date submitted	3/10/2025 5:32:02 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Very satisfied
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	Overall staff are satisfied with the products being offered by SWAN. We rated WorkFlows as very satisfied because most staff have no other platform to judge by.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Overall staff felt the platforms to be user friendly and meeting the needs of our size library. There are issues that cause some downtime with WorkFlows but then staff work offline. Some WorkFlow issues that were mentioned were the desire to see fewer labels in the dropdown menus, some labels don't apply to our library and removing them would simplify the process. Staff feel that at first WorkFlows can feel confusing but after initial training it's found to be easy to navigate. Regarding BLUECloud Analytics, the reports are comprehensive but there is a wish for it to be more customizable by the library. While staff indicated that BCA is useful they feel it could be more user friendly and simpler to use. One staff member reported often needing help from SWAN Support. Complaints regarding LIDA were slow to log in, being automatically signed out of account, and amount of times app has been down. Aspen complaint is unplanned downtime and not being able to yield the

Membership Satisfaction with SWAN Platform: survey results

	most current copy or recent release of a movie. No concerns with MessageBee or Worldshare.
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Hinsdale Public Library
Name	Karen Keefe
Date submitted	3/17/2025 4:13:00 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	Dissatisfied
LiDA rating	No basis for judgement
Aspen rating	Very satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	4
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Homewood Public Library
Name	Angela Messaglia
Date submitted	3/13/2025 1:20:39 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Neutral
LiDA rating	Neutral
Aspen rating	Satisfied
MessageBee rating	Neutral
OCLC rating	Neutral
Your comments on rating	I haven't had the opportunity to use the Mobile Circ app yet, but very interested in using it soon.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	I have always preferred Workflows over using the Aspen catalog when finding books for patrons, mostly because it has more "inside" data. Aspen has been sufficient, but I would love it if the searches could be narrowed down more for picture books, since that it was I look for a lot as a youth librarian. When you search for example, "cats", you will get juvenile fiction books, but it's a mix of picture books and middle grade. I would love to narrow down the searches more if possible.
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.	n/a
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Membership Satisfaction with SWAN Platform: survey results

Library	Homewood Public Library District
Name	Nathan Hare
Date submitted	3/12/2025 3:40:12 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	No basis for judgement
LiDA rating	No basis for judgement
Aspen rating	Neutral
MessageBee rating	No basis for judgement
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>I appreciate BCA and use it frequently and SWAN support staff do an excellent job of answering questions I have regarding it.</p> <p>I wish the 'place blanket hold' wizard functioned correctly in Workflows.</p>
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.	<p>This isn't particular to a product, although I think the likeliest place is in Aspen, but it would be nice for staff to have some way (outside of sorting the holds queue in Workflows) of estimating where a patron is in the holds queue/how many holds are on an item.</p> <p>It would also be nice if Aspen had some way of automating placing approved purchase requests a patron made in Aspen on hold for the patron if the item is already in the system.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Indian Prairie Public Library District
Name	Laura Birmingham
Date submitted	3/12/2025 11:54:56 AM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Dissatisfied
Aspen rating	Neutral
MessageBee rating	Satisfied
OCLC rating	Neutral
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	6
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	MessageBee is very useful and gives great information and it easy to use. When guests say they "never" got a notice, it is awesome to be able to pull up the data for them.
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.	<p>The SWAN library app is unbelievably slow and also seems to require new logins randomly. It is hard to recommend to guests when these issues exist.</p> <p>Workflows is not intuitive for users and there is inconsistency between information across the different Wizards and how it is displayed.</p> <p>In WorldShare, it is difficult to see the libraries that own items.</p> <p>Aspen outages have been frequent lately, which is a huge problem Overall, Apsen is easy to use, but the outages make things difficult.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Itasca Community Library
Name	Kristen Wunder
Date submitted	3/17/2025 9:50:55 AM
WorkFlows rating	Very dissatisfied
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	No basis for judgement
LiDA rating	Very dissatisfied
Aspen rating	Dissatisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	<p>Workflows- it is impossible to search for items without using Aspen or ultra specific information. So much of our work relies on us being able to find materials quickly, and Workflows is too clunky. It will not accommodate searching with spelling errors or any deviation from how the book title was catalogued. Most of the time, when helping patrons, we use Aspen because it's much easier to use and we can find a picture of the cover (often the patron knows what the cover looks like). Then we use masquerade mode to place a hold or use the Call Number on Aspen to pull up the record in Workflows to place a hold. This should be much simpler.</p> <p>We've had issues with patrons paying bills before as well. For example, we marked an item lost for a patron since they wanted to pay the bill but because we didn't complete the transaction on that page it disappeared from the bill page. We had to find the bill - it seems after it is marked lost it goes into an inactive state and doesn't appear. This is way too confusing, and not user friendly. We have a lot of issues with library accounts showing "bills" that have either already been paid or shouldn't be showing bills since they are internal accounts.</p>

Membership Satisfaction with SWAN Platform: survey results

We had a lot of trouble with Ingram invoices not showing up on Workflows. Part of this was due to some errors made by staff during rollover. However, even after SWAN indicated issues with invoicing were fixed, we would sometimes still not be able to find them.

It would be nice to have the option to personalize Workflows and remove some of the wizards that we never use. There are way too many wizard options. Many functions can be completed from the Charge/Checkout Screen. Staff are confused by having too many options for modifying holds.

Aspen- It would be nice to have the movie run-time included in cataloging, particularly in Aspen. It should also be easier to narrow down the type of item you select. For example, you can specify audiobook, and those options come first, but it still populates other options which is really confusing.

SWAN APP- We've received patron feedback that the SWAN app is not always user friendly.

App is tremendously slow. It can take 15 seconds to load the home screen.

App logs patrons out frequently. Not possible to promote in-app library card if it logs patrons out weekly.

Bluecloud Analytics- Way too many layers to click through to get to the useful reports. Too many reports that are not useful or are confusingly named. Having to reselect common options (selecting my library's data) every time is irritating

Membership Satisfaction with SWAN Platform: survey results

<p>Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well</p>	<p>2</p>
<p>For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.</p>	
<p>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.</p>	<p>Workflows- it is impossible to search for items without using Aspen or ultra specific information. So much of our work relies on us being able to find materials quickly, and Workflows is too clunky. It will not accommodate searching with spelling errors or any deviation from how the book title was catalogued. Most of the time, when helping patrons, we use Aspen because it's much easier to use and we can find a picture of the cover (often the patron knows what the cover looks like). Then we use masquerade mode to place a hold or use the Call Number on Aspen to pull up the record in Workflows to place a hold. This should be much simpler.</p> <p>We've had issues with patrons paying bills before as well. For example, we marked an item lost for a patron since they wanted to pay the bill but because we didn't complete the transaction on that page it disappeared from the bill page. We had to find the bill - it seems after it is marked lost it goes into an inactive state and doesn't appear. This is way too confusing, and not user friendly. We have a lot of issues with library accounts showing "bills" that have either already been paid or shouldn't be showing bills since they are internal accounts.</p> <p>We had a lot of trouble with Ingram invoices not showing up on Workflows. Part of this was due to some errors made by staff during rollover. However, even after</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>SWAN indicated issues with invoicing were fixed, we would sometimes still not be able to find them.</p> <p>It would be nice to have the option to personalize Workflows and remove some of the wizards that we never use. There are way too many wizard options. Many functions can be completed from the Charge/Checkout Screen. Staff are confused by having too many options for modifying holds.</p> <p>Aspen- It would be nice to have the movie run-time included in cataloging, particularly in Aspen. It should also be easier to narrow down the type of item you select. For example, you can specify audiobook, and those options come first, but it still populates other options which is really confusing.</p> <p>SWAN APP- We've received patron feedback that the SWAN app is not always user friendly.</p> <p>App is tremendously slow. It can take 15 seconds to load the home screen.</p> <p>App logs patrons out frequently. Not possible to promote in-app library card if it logs patrons out weekly.</p> <p>Bluecloud Analytics- Way too many layers to click through to get to the useful reports. Too many reports that are not useful or are confusingly named. Having to reselect common options (selecting my library's data) every time is irritating</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Justice Public Library District
Name	Juanita Durkin
Date submitted	3/13/2025 3:59:47 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Very satisfied
Aspen rating	Very satisfied
MessageBee rating	No basis for judgement
OCLC rating	Very satisfied
Your comments on rating	Workflows and BLUEcloud Analytics are functional, but not easy to learn or use. Specific details are in the comments at the bottom. We haven't used MobileCirc/Staff or MessageBee enough to comment on them, though they seem OK from the little we've played around with them.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Aspen is easy to use and the patrons really like the simplicity for searching. The one thing they do get confused on, though, is format. They sometimes end up holding a CD, when they wanted a downloadable audiobook. (Maybe just change the label from "Audiobook CD" to "CD Audiobook" or "Compact Disc".) Our patrons also really appreciate how easy LiDA is to use. (Did you really go Greek mythology for that name? I know technically it's Leda, but it's still suspicious.) Patrons *really* love being able to scan their barcodes from their phones. That's their favorite feature, hands down. WorldShare/WorldCat are fairly easy to use and we generally have no problems finding the material we want. The only thing I'd change is the report feature. It works, but like BLUEcloud, it isn't always easy to format the way I'd like. There's no major dissatisfaction with it, though.

Membership Satisfaction with SWAN Platform: survey results

<p>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.</p>	<p>We're not actually dissatisfied with any of them. However, having to open three different tabs to place a simple hold in Workflows is annoying and WorkFlows is still missing functions that Millennium had that I used fairly often. Merge patron records is the one I miss the most, because it would move fines, lost items, etc., in one easy step if a patron had a previous record that we missed at registration. (We've actually had patrons change the way their names are spelled or their children's birthdates to avoid having those old records found...) BLUEcloud is OK, but not easy to format. And I <i>*really*</i> wish that someone would make a sort feature that is capable of: 1) <i>*ignoring beginning articles*</i> (the, a, an) in titles and 2) <i>*recognizing spaces*</i> in call numbers. As it is, I have to manually sort every report that relies on either one.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Kaneville Public Library District
Name	Shayne Phillips
Date submitted	3/17/2025 1:16:57 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Dissatisfied
Aspen rating	Satisfied
MessageBee rating	Neutral
OCLC rating	Neutral
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	La Grange Park Public Library District
Name	Gabe Oppenheim
Date submitted	3/11/2025 3:29:44 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Dissatisfied
LiDA rating	Dissatisfied
Aspen rating	Very dissatisfied
MessageBee rating	Neutral
OCLC rating	Neutral
Your comments on rating	We aren't totally dissatisfied with any of these products, but there is enough room for improvement in each to merit these low ratings.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	5
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	We like masquerade mode in Aspen and the grouped records (when it works properly). We enjoy it visually.
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.	<p>In WorkFlows, we wish it'd be easier to mark items as damaged versus lost. There's a way, but it's more complicated. Advanced search is clunky. Unable to sort searches.</p> <p>In BlueCloud Analytics, many reports seem more onerous than necessary. It's also odd that there aren't report templates for commonly used purposes.</p> <p>MobileCirc never works! Difficult to scan cards; will often shut down more often than necessary. Cannot seem to create new library card.</p> <p>LIDA app is slow and often not functioning (backend).</p> <p>Aspen Discovery: the patron experience is horrendous. Get a single letter wrong, get no result! Series don't always work properly. Wish creating and updating lists was easier.</p>

Membership Satisfaction with SWAN Platform: survey results

	Why is there no longer an auto renewal message sent via MessageBee?
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Membership Satisfaction with SWAN Platform: survey results

Library	Lansing Public Library
Name	Lisa Trevino
Date submitted	3/7/2025 1:11:42 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Neutral
LiDA rating	Dissatisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	SWAN assistance with all of these has been helpful in regard to best practices and custom reports.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	6
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>BlueCloud - The reporting we need is there and if it is not, SWAN is willing to customize a report for us. They also were proactive with IPLAR reports.</p> <p>Aspen - The back end work has provided accurate search results and the overall usability is better for patrons.</p> <p>MessageBee - The marketing feature has been a positive addition to how we reach out to patrons. The reports are helpful so we can reach out to patrons about failed notifications.</p> <p>WorldShare - Implementing the SWAN best practices has been extremely helpful.</p>
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.	LiDA - The speed of development and not having features that we previously had is disappointing. These features were intended to be available but have seen huge delays. The app also has a long loading time, which can be frustrating for the patrons.
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Membership Satisfaction with SWAN Platform: survey results

Library	Linda Sokol Francis Brookfield Library
Name	Yesennia Ruiz
Date submitted	3/13/2025 12:07:53 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Dissatisfied
LiDA rating	No basis for judgement
Aspen rating	Dissatisfied
MessageBee rating	Very satisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	9
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Our staff is now well-versed in Workflows, and training for department-specific tasks are straightforward. Messagebee has provided marketing and outreach teams with an effective new way to promote events to members who frequently check out items.
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.	Both Mobile Staff and Aspen Discovery have shown inconsistency throughout the year. Aspen, in particular, has had multiple issues that hindered staff from effectively assisting members. Mobile Staff, even when used on the recommended devices, has proven unreliable. Additionally, the interface is not user-friendly for staff during outreach, where quick interactions with the public are crucial. BlueCloud Analytics offers strong reporting options, but staff members vary in their level of familiarity with how and when to use it. Not all staff has the same amount of time to familiarize themselves with the many reports.
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Membership Satisfaction with SWAN Platform: survey results

Library	Melrose Park Public Library
Name	Margaret Flanagan
Date submitted	3/13/2025 12:03:49 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Neutral
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
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.	Staff have reported that they find both Workflows and BCA clunky. Some staff have reported difficulty searching in Workflows and BCA too complicated. LIDA downtime has been an issue for staff and patrons.
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Membership Satisfaction with SWAN Platform: survey results

Library	Midlothian Public Library
Name	Jennifer Cottrill
Date submitted	3/10/2025 1:04:14 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Very satisfied
Aspen rating	No basis for judgement
MessageBee rating	No basis for judgement
OCLC rating	Very satisfied
Your comments on rating	WorkFlows is just too archaic and it presents searching problems BlueCloud Analytics works but is just way too complicated
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Message Bee beta version is a good interface; we're just curious if they're planning to move past it. We love masquerade mode in Aspen and the ease of searchability. We like LiDA in that it is so self-explanatory patrons don't bug us about it. We notice a lot of patrons using it to scan their barcode.
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.	See above for our dissatisfaction with WorkFlows and BlueCloud Analytics. We would be very happy to go to an RFP for products other than SirsiDynix to replace these.
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Membership Satisfaction with SWAN Platform: survey results

Library	Northlake Public Library District
Name	Laura Bartnik
Date submitted	3/6/2025 2:52:13 PM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Dissatisfied
MobileCirc rating	Very dissatisfied
LiDA rating	Satisfied
Aspen rating	Dissatisfied
MessageBee rating	Satisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	4
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>LiDA: Satisfied. It works well and it has come a long way but there are still ways to improve it, such as adding the More Like This and Staff View features that exists in the OPAC.</p> <p>Aspen: Satisfied. When it's not down for whatever reason it works very well and has a ton of helpful features. Seems like it's finally functioning well after a rough roll out where patrons and staff were very dissatisfied.</p> <p>MessageBee: Satisfied. Once we got past the issue of not sending out auto renewal notices Message Bee has been fine. Very dissatisfied with not receiving that info ahead of roll out as it created a lot of confusion for staff and patrons.</p> <p>WorldShare ILL & WorldCat Discovery: Very satisfied. "As the main ILL person for our library, I find both to be fantastic. WorldShare has a decent website, is continually updated, and is used by so many other libraries.</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>WorldCat Discovery is great for patrons (who know about it) and also helpful for staff, whether to find an item for a patron or to help ourselves catalog items. Also Helen was fantastic in helping us improve our OCLC settings."</p>
<p>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.</p>	<p>WorkFlows: Dissatisfied. "It gets the job done but it's not pretty, and the variety of ways to do most tasks makes things more confusing rather than less. It very much needs updating and improving (or rather, from what I hear, SirsiDynix needs to be much more responsive in updating and in improving it)." "Still upset about the lost functionality in Millenium of being able to access the previous patrons" "It takes so many clicks and windows open for 1 simple patron transaction" BLUEcloud: Dissatisfied/Neutral Reference staff are dissatisfied with running reports for collection development. Not easy to find reports, running lots of reports only to find that the results are not what you're looking for. Staff who used the Millenium report server liked the ability to generate unique reports rather than relying on "canned reports". Circ staff who use the same reports over and over gave a neutral rating to BLUEcloud "I don't think there's ever been something I've wanted to do with BLUEcloud that I haven't been able to, but there's bit of a learning curve." MobileStaff: Very dissatisfied. It impressively manages to be worse than WorkFlows. It has little functionality and we only use it for inventory.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Oak Brook Public Library
Name	Jacob Post
Date submitted	3/14/2025 10:00:31 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Neutral
LiDA rating	Dissatisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	Below are comments from staff:
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Here are comments from staff:</p> <ul style="list-style-type: none"> - WorkFlows can always locate records quickly; reliable - Aspen has a good user-interface; responsive company - Overall, the change to Aspen has been great and continued improvements from library feedback is an important ongoing project. - MessageBee has been a positive change from previous vendor. Customization, reliability, and error reports are all top-notch. - There is always room for improvement, but these products meet our needs. - SWAN has done a lot of work behind the scenes customizing, maximizing, and understanding each product, especially WorkFlows. Before choosing products with a prettier interfaces, I hope the members consider the progress SWAN has made with current products and realize it will take SWAN some time to learn the new

Membership Satisfaction with SWAN Platform: survey results

	<p>systems and tweak them for our vast needs.</p>
<p>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.</p>	<p>Here are comments from staff:</p> <ul style="list-style-type: none"> - The mobile app issues are the area for most improvement. The initial load time is very long and a turn-off for many users. The Discover page does not match the catalog home page content so anything you want to focus on your catalog home page does not translate to the app. It lacks customizable features. Overall, I think the app is a neutral user experience at best. - I recommend re-thinking item renewal times and frequency. We still have a huge chunk of items that fail to renew because of an unfulfilled hold. However, there are plenty of available copies and that hold is filled soon after. Still the item fails to renew because there was a hold at the time. - BlueCloud reports are great but can be cumbersome to get the data you want. A BCA "starter pack" would be a nice feature. For example, a "starter pack" collection of circulation stats/reports, of weeding reports, user reports, etc. - In BCA some reports I'd like are not feasible; acquisitions reports are only OK - As a LIDA user, I hate how it keeps logging me out; typing in the 14 digit ID that isn't memorized is very annoying; JUST KEEP ME LOGGED IN OR HAVE A SAVE-INFO FEATURE!
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Membership Satisfaction with SWAN Platform: survey results

Library	Oak Lawn Public Library
Name	Jenny Yasecko
Date submitted	3/3/2025 3:46:03 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	Satisfied
LiDA rating	Satisfied
Aspen rating	Very satisfied
MessageBee rating	No basis for judgement
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	BLUECloud Analytics has been a great tool for us pulling information about our collection. Aspen Discovery helps patrons and staff find exactly what they are looking for and discover other formats the library offers. The LiDA app is easy to use.
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.	Although we are not completely dissatisfied with WorkFlows, we think there might be a better product out there that will meet our needs. We would love to be included in any demos of future ILS, if Swan is looking to change ILS.
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Membership Satisfaction with SWAN Platform: survey results

Library	Oak Park Public Library
Name	Leigh Tarullo
Date submitted	3/4/2025 12:58:42 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	Satisfied
LiDA rating	Very satisfied
Aspen rating	Very satisfied
MessageBee rating	Very satisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	9
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Park Forest Public Library
Name	Mary VanSwol
Date submitted	2/26/2025 12:43:19 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Neutral
LiDA rating	Very satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Workflows: Staff have no issues.</p> <p>BlueCloud Analytics: I like that I can save my reports and just change the dates each time I need to run them. I like that I can run a variety of reports to find materials or people.</p> <p>Mobile Circ/Mobile Staff: We haven't used this much, but it enabled staff to register patrons off-site.</p> <p>LIDA: We really like the patron app and encourage patrons to get the app so that they have their barcodes with them everywhere they take their phones.</p> <p>Aspen Discovery: I like that it shows all forms of media for a single title. I like the covers. I like that it shows articles in EBSCO so patrons don't need to know which database to use to find articles. I like that we can add messages. I like that we can customize the titles shown on the homepage. I like placards. I like the masquerade function.</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>MessageBee: I like that it shows when messages have failed so that we know an email or phone is wrong in the record.</p> <p>WorldCat: Staff have no issues.</p>
<p>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.</p>	<p>Workflows: It can be tricky to learn because of all of the menus.</p> <p>BlueCloud Analytics: Occasionally, I need to ask for help to set up a report I can't seem to find or make myself.</p> <p>Mobile Circ/Mobile Staff: I had some trouble with the scanner I bought to scan driver's licenses. It works sometimes and not others.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Prairie Trails Public Library District
Name	Mary Ann Lema
Date submitted	3/11/2025 10:56:04 AM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Satisfied
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	River Forest Public Library
Name	Emily Compton
Date submitted	3/3/2025 11:19:49 AM
WorkFlows rating	Dissatisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Dissatisfied
Aspen rating	Dissatisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	Regarding the new app, it is slow and we miss being able to check out through the app.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	4
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	River Grove Public Library
Name	Dayna Tucker
Date submitted	2/26/2025 4:50:47 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	No basis for judgement
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	No basis for judgement
MessageBee rating	No basis for judgement
OCLC rating	No basis for judgement
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	5
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.	
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Membership Satisfaction with SWAN Platform: survey results

Library	Schiller Park Public Library
Name	Rhiannon Taylor
Date submitted	3/13/2025 12:28:57 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Neutral
Aspen rating	Very satisfied
MessageBee rating	Dissatisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	The applications are very user friendly and once you get the hang of it, it becomes quite intuitive. We also appreciate that there are multiple paths to reach the same goal, allowing different approaches to the same problem to reach similar solutions.
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.	Personally, we find Messagebee to be very overwhelming, often inaccurate, and not all that reliable. It functions, but can be frustrating to set up and navigate through.
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Membership Satisfaction with SWAN Platform: survey results

Library	Steger-South Chicago Heights Public Library District
Name	Jessica Rodrigues
Date submitted	2/26/2025 2:05:39 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	Satisfied
LiDA rating	Dissatisfied
Aspen rating	Dissatisfied
MessageBee rating	No basis for judgement
OCLC rating	No basis for judgement
Your comments on rating	<p>Aspen: - Missing the ability to narrow search by other libraries. For example, if a patron is looking for the first 4 Dog Man books, they may want to narrow the search to the three libraries they're willing to drive to in order to see which one has the ones they're looking for.</p> <p>LIDA: - We hear complaints about very slow load times, which leads a lot of patrons to think it isn't working rather than waiting the 30 seconds for it to come to the main screen. - It is difficult to tell which library has an item on shelf. On the browser, the libraries with available copies show in bold, making it easier to browse for nearby libraries. This feature is not present on the app, and it is especially difficult to browse the availability of certain hot items that every library owns multiples of.</p>
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	I like being able to schedule reports on BlueCloud, and I like the responsiveness of staff when we have needed help in the past.

Membership Satisfaction with SWAN Platform: survey results

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.	WorkFlows is needlessly complicated, riddled with unintuitive idiosyncrasies, and is incredibly difficult to train new staff members to use. The Item Search function is especially cumbersome.
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Membership Satisfaction with SWAN Platform: survey results

Library	Theosophical Society in America
Name	Anna De Leon
Date submitted	2/27/2025 1:03:22 PM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	Very satisfied
MessageBee rating	No basis for judgement
OCLC rating	Satisfied
Your comments on rating	Overall I find these services extremely helpful. Occasionally when using BLUECloud Analytics it can be hard to find the exact report needed. When using LiDA, it works very well most of the time but we occasionally notice the search results aren't as optimal as they could be, or need very specific spellings/specifications to bring up a topic/title.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	10
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Most if not all of the products listed work very well for our library. While WorkFlows has a bit of a learning curve (which ILS doesn't?), I find it overall very thorough, flexible, and user friendly in the sense that mistakes can generally be fixed quickly.</p> <p>We've had no problems with Aspen Discovery OPAC other than the occasional hiccup due to our own computers function. Patrons generally have little to no problems operating the online catalog.</p>
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.	While I'm very satisfied with BLUECloud Analytics, my only frustration can be the difficulty in finding a specific report I need. I've always been able to find the report eventually, but sometimes the names of the reports are so similar that switching

Membership Satisfaction with SWAN Platform: survey results

	<p>through them all to get the exact one I need is confusing.</p> <p>When using the LiDA mobile app, I've noticed that searching for materials needs to be spelled exactly as the title is (not even one letter off), and require very specific terms in order to pull up a topic or title our patron is looking for. While our staff has more options and flexibility in WorkFlows, this can occasionally frustrate a patron who can't pull up the same results we can.</p> <p>We use WorldShare ILL and WorldCat Discovery, and they are very robust, thorough and helpful. However, there's a pretty big learning curve and when mistakes are made it can be hard to track down the issue and/or fix it. This makes our staff a bit nervous or tense when using the service as we don't want to mess anything up. But we're able to use this and find it extremely helpful.</p> <p>As for the Mobile Circ/Mobile Staff and MessageBee, we don't have a library tablet so we don't use the former, and while we receive email notifications from the latter we really don't use them.</p>
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Membership Satisfaction with SWAN Platform: survey results

Library	Thomas Ford Memorial Library
Name	Ted Bodewes
Date submitted	2/26/2025 2:10:24 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Very satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Very satisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	9
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Message Bee is excellent.
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.	The long load time for the Lida App makes it impractical for patrons wanting to pull up their library card and check out quickly. It's easier to just loo up the account. It also times out super-fast.
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Membership Satisfaction with SWAN Platform: survey results

Library	Thornton Public Library
Name	Kathy Dejnowski
Date submitted	2/27/2025 11:07:33 AM
WorkFlows rating	Very satisfied
BLUEcloud Analytics rating	Neutral
MobileCirc rating	Neutral
LiDA rating	Neutral
Aspen rating	Very satisfied
MessageBee rating	Satisfied
OCLC rating	Neutral
Your comments on rating	The items that say neutral are because I know we have them but have not interacted with them. I want more training on them. I have been trying to register for the OCLC webinars, but it makes me log in to our OCLC account first, and I am having trouble logging in. I have never used the BLUEcloud analytics, Mobile Circ, or LiDA, I have never heard of LiDA before. Are there any webinar recordings or future webinars that will be available, that will be great. I will sign up for the OCLC ones as soon as I figure out why I cannot log in.
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	Since we have been working with workflows since it was first introduced, it is easy for us to operate, and with the right format, we can teach new employees how to use it as well. Messagebee is rarely new, and I'm still learning how to use it. Aspen is simple and easy to use for us and our patrons.
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.	Mostly because I have not utilized them, I'm not familiar with any of them like I am with the others. Although I'm always willing to learn.
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Membership Satisfaction with SWAN Platform: survey results

Library	Tinley Park Public Library
Name	Zach Musil
Date submitted	3/14/2025 3:26:16 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	Satisfied
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Very satisfied
OCLC rating	Very satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Workflows is generally easy to navigate.</p> <p>LiDA works smoothly from the patron side.</p> <p>We appreciate the Detailed Search and SMS Messaging features in Message Bee. If a patron claims they are not receiving their notifications, we can look at the messages sent and see what the problem is and try to correct it. We use the SMS Messaging feature to send text messages to patrons or answer their occasional responses to notifications they receive.</p> <p>We also appreciate the daily email Message Be sends listing any notification failures so that we can try to contact the patrons to make sure they are getting notifications and update their contact information.</p> <p>Aspen is wonderful for search and discovery. I like masquerade mode and I like that it is FRBRized. Yes there are some</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>occasional issued with how it handles fulfilling holds (for example sometimes putting a hold on a record that doesn't make sense in terms of available copies), but overall it is great.</p> <p>Aspen has greatly improved since SWAN implemented it. I really like masquerade mode, and I appreciate that it no longer redirects when activated.</p> <p>I really like Aspen, especially Masquerade mode. This has been really helpful when Workflows goes down.</p> <p>After searching for an item in Aspen, I love the way all available formats for one title are listed together</p> <p>Aspen's recommendations can be helpful at times</p> <p>Worldshare is user friendly</p>
<p>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.</p>	<p>In the different display formats the author should only be taken from the 1xx field. If there is not an author the 7xx should not be used it in its place.</p> <p>Authors of different seasons of the same television series vary. For The Good Wife, the five seasons have three different "authors" (actors); the choice reflects nothing about the predominance of a specific actor within that season. This is very confusing to patrons and staff</p> <p>For the brief display in Workflows the whole 245 should be used.</p> <p>Items should be deleted as part of the discard process even if there are holds when there are other items available.</p>

Membership Satisfaction with SWAN Platform: survey results

Workflows is fine, yes it could be more user friendly, but I like that it is relatively simple. However, I do not think it is the best product when it comes to search and discovery “ however, we have Aspen for that, so I do not think that is necessarily a bad thing. Workflows is good at what it sets out to do.

Workflows does its job, and I think it works well. I think my biggest complaint is that it is not always intuitive on how to do certain actions “ for example, reordering hold queues, when necessary, is not always easy to figure out.

Workflows is great, but searching and discovering items in workflows can be challenging (especially without the standard number).

Workflows is not user friendly, and searching for items is difficult.

Searching in WorkFlows produces inconsistent results.

There are still some hiccups with holds placed through Aspen, I think particularly with fiction books with several editions (or that’s just the most obvious one to me). For example, a Tinley Patron wanted to place a hold on “The Final Wish of Mr. Murray McBride” by Joe Siple. We own an older edition that was checked out and a few libraries that do not allow holds on new items had the newer edition. Because our copy was checked out, Aspen tried to place a hold on the new edition, but it was blocked “ instead of going back to the older edition held by Tinley, it just would not allow the patron to place a hold at all. Sometimes this also will become apparent

Membership Satisfaction with SWAN Platform: survey results

when our copy of a popular title is checked out but has no holds from other Tinley patrons. For example, a patron may want "A Court of Thorns and Roses" by Sarah J Maas " our copy is checked out, so another edition of this title is selected. However, the patron may now be 20th in the hold queue for that specific record of the Maas book, while they would have been prioritized for our copy and received it next after the current checkout period ended.

Aspen has lately been timing out a lot and generally slow to return search results, which as been frustrating.

Lists of items in Aspen are not well organized.

Lately Aspen has been running quite slow (including time outs)

It is sometimes hard to find items in Aspen because of nesting and ISBNs are not attached to unique items

Aspen sometimes combines things that shouldn't be combined (separate versions of Harry Potter). Combining items types that are not interchangeable.

Aspen's filters do not function as expected.

Difficult to limit searches in Aspen only to juvenile chapter books, picture books, and ready reader books

In Aspen, there is no way to limit holdings to teen fiction at Tinley Park (e.g., if another library has a book marked in teen fiction but it is in adult fiction at Tinley Park, the item will appear in the teen fiction search results)

Membership Satisfaction with SWAN Platform: survey results

	<p>Worldshare works fine, although you do need to make sure you have things exact, as the search is not forgiving of typos, etc.</p> <p>I think Worldshare/Worldcat works and is not too difficult to navigate. My biggest complaint is that when I select a Custom Holdings Path, it will automatically select libraries to request from “ and sometimes include Canadian libraries. This is also frustrating when I have already selected some libraries to request from, choose to filter by a Custom Holdings Path, and it will erase my chosen libraries with its own automatically generated list.</p> <p>Worldshare is overall fine and easy to use. Sometimes when we are looking at items to request, there will be foreign options mixed in with the states initially. It's easy to fix when you notice it, but it can also be easy to miss if you aren't careful.</p>
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Membership Satisfaction with SWAN Platform: survey results

Town and Country Public Library District
Megan Shumaker
3/6/2025 3:36:12 PM
Neutral
Neutral
No basis for judgement
Neutral
Neutral
Satisfied
Very satisfied
WorkFlows is clunky. It can't handle typos. It can't autofill. You have to type in exactly what you want or it can't find it. If many search results, it can't sort them. Placing holds is quicker on Aspen using Masquerade. Our Tech Services department commented that they can't do things in batches, which is really annoying.
Aspen and LiDA are great...when they work. But lately they have been down a lot or very slow when they are working.
Those of us who use BLUEcloud regularly are used to it and know where to find what we need. For those who are unfamiliar it's really hard to find the report you want, and the pages are super disorganized.
7

Membership Satisfaction with SWAN Platform: survey results

Attached is a document with screenshots from WorkFlows. The first two show problems when searching for items (not search for titles that start with "And" and not being able to sort results if there are too many). The last two screenshots try to exit WorkFlows while a window is open, it gives you a message that says, "This will halt the workstation" and asks. However, even if you hit "yes," another message pops up that says, "There are open wizards that require your attention."

https://support.swanlibraries.net/system/files/webform/membership_satisfaction_survey_w/13351/WorkFlows%20S

Membership Satisfaction with SWAN Platform: survey results

Library	Villa Park Public Library
Name	Sandra Hill
Date submitted	3/14/2025 10:17:11 AM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Neutral
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Dissatisfied
Your comments on rating	<p>Only one department head was satisfied with BlueCloud. That individual has the most off desk time to work with the product.</p> <p>WorldCat while upgraded had no noticeable improvements. Looks prettier, but is more clunky to use. One department head indicated they use the SWAN Libraries +app often and recommends it to patrons often, who are mostly startled to learn that the library has an app at all. Convenient to use on the go and digital barcode option to store cards numbers is great, however, it is slow to load and does not allow user to see much in way of item details. Browse category function and appearance is extremely limited.</p>
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Our one staff member who is more acquainted with BCA indicated it compares favorably to Collection HQ in quality and scheduling of reports,</p> <p>Aspen has much to offer library patrons (and staff) but also exposes the weakness in item and series cataloging that exist. I love the grouped records, they are a great help to patron searches, but they do require a lot of work and upkeep for SWAN and member library staff as they find items</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>to group or change grouping for. Also-- kudos for allowing staff to add cover images when an item is missing them. There is a hope that was expressed that Aspen will become more stable on the new server.</p>
<p>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.</p>	<p>See above for comments.</p>
<p>File uploaded?</p>	

Membership Satisfaction with SWAN Platform: survey results

Library	Warrenville Public Library District
Name	Jason Stuhlmann
Date submitted	3/11/2025 3:50:33 PM
WorkFlows rating	Neutral
BLUEcloud Analytics rating	Neutral
MobileCirc rating	No basis for judgement
LiDA rating	Neutral
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Neutral
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
For the products for which you indicated satisfaction, please provide detailed feedback on which features of which products you appreciate.	<p>Various comments by staff:</p> <p>MessageBee - satisfied, but would still prefer if it would tell patrons when items are automatically renewed.</p> <p>Aspen - Love masquerade mode. Loves the home page with the carousels to feature things. Love the Ferberization.</p>
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.	<p>Various comments by staff:</p> <p>Workflows - I can be awkward to use. It doesn't feel like it was designed by someone who works in a library. Outdated looking. Involves too many clicks to get where you want to go and do what you want to do. Not very user friendly. Hard to search with, would love some predictive language. No ability to mark an item as Damaged. The Claims Returned feature is clumsy. Would be nice to be able to print a holds list direct from Workflows without needing to download and tweak a bunch. Some functions seem redundant or unclear.</p>

Membership Satisfaction with SWAN Platform: survey results

	<p>LiDA - For one staff it is continually logging out. Searching is a bit clunky. But checking account info is good.</p> <p>BlueCloud - Love the premade reports, but trying to create a report from scratch is near impossible. Sometimes difficult to find the specific helpful report for a desired bit of information.</p>
File uploaded?	

Library: Westmont Public Library

Name: Colleen Seisser

Date submitted: 3/14/2025 4:06:53 PM

Please rate your satisfaction with each of the following products: WorkFlows -- Staff client from SirsiDynix	Satisfied
Please rate your satisfaction with each of the following products: BLUEcloud Analytics -- Data analysis and reporting from SirsiDynix	Satisfied
Please rate your satisfaction with each of the following products: MobileCirc/MobileStaff -- Staff tablet-based app from SirsiDynix	No basis for judgement
Please rate your satisfaction with each of the following products: LiDA -- Library Discovery App, aka SWAN Libraries + mobile application	Neutral
Please rate your satisfaction with each of the following products: Aspen Discovery -- SWAN OPAC supported and developed with ByWater Solutions	Satisfied
Please rate your satisfaction with each of the following products: MessageBee -- Notification platform with Unique Management Solutions	Satisfied
Please rate your satisfaction with each of the following products: WorldShare ILL & WorldCat Discovery -- OCLC group-services for Illinois libraries, managed by SWAN	Satisfied
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	8

Your comments on the overall experience rating

"Two staff members submitted the following:

Overall I am satisfied with our current lineup of services. They have their quirks, which I included some details about below, but overall they are working well.

SirsiDynix overall is not a very user friendly ILS. I used Polaris at a previous library and found that much easier to navigate and use."

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

Here are various staff member responses:

Workflows and BLUECloud work well. I really appreciate all of the reports that are set up in BLUECloud. It makes it really easy to run those reports. I do find searching for items in Workflows a little clunkier than Aspen, but it works well for placing holds and managing patron's accounts. I find that OCLC works well and I am satisfied with that website.

I can fairly easily acquire the info I need.

Although BLUEcloud analytics has a lot of folders and subfolders to go through that can be confusing, once I know where the report is that I want, it is really simple to run and export the report.

I like using WorldShare advanced search to quickly find the exact item that I am looking for. The Homepage quick links make it easy to see what I need to address.

I find Aspen catalog very user/employee friendly. It can bring up items that workflows buries.

WorldCat works the way it should and is easy for staff to search and use to place holds for patrons.

I am satisfied with BCA because support staff set up a number of custom reports for us which have been very helpful.

Workflows is easy to use to perform checkin/checkout functions and to help patrons update their accounts. Aspen Discovery is good for searching for items that patrons request. MessageBee is good for giving us a heads up that something may be incorrect with a patron's information but it also gives an alert for accounts that there are no problems with the info just maybe the email or voicemail is full or the patron simply didn't pick up the call.

SWAN app - quick and easy to use, Workflows and Blue Cloud Analytics - meets our needs

General feedback across the satisfied sections is that while the Sirsi products chosen by SWAN are not perfect, they are adequate. It is frustrating to see other library systems utilize different, more capable systems while we just seem to stick with Sirsi and library feedback to SWAN seemingly goes ignored.

A portion of the dissatisfaction definitely lays at the feet of SWAN's communication.

Here is an example regarding communication around the SWAN app. It's clear from the wording that SWAN was aware that the SWAN app could be discontinued was a possibility and that they were looking into an alternative: https://drive.google.com/file/d/1QurtsKxf7-JidndQxVtnTRLIN6Fkyi22/view?usp=drive_link

Furthermore, three days prior to the above screenshot, SWAN messaged that there was an outage and that Sirsi was working on resolving the issue. This ended up being an end of life for the app so what kind of communication are we supposed to believe?

https://drive.google.com/file/d/17TTeY5cR0YVYQ_L4kvkUN6qM7Jb1V1hb/view?usp=drive_link

This is emblematic of SWAN's larger communication strategy of making wide reaching decisions and then not informing libraries until it affects them directly. SWAN did not get the frustrated feedback from patrons, we did. It makes it difficult to recommend that patrons utilize any of SWAN's resources.

Workflows is an aging platform and I believe it's time to move to an alternative. It functions but the frequent disconnection or configuration errors that occur are frustrating to say the least.

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.

Here's various responses submitted by staff members:

I rated the SWAN Libraries app as "somewhat satisfied" because the catalog is a little clunkier to use compared to the layout on the desktop version. On the desktop version you can see which e-book or audio-book vendor has the title available on the main page when searching. On the app you have to click into the item and go to another screen to see which vendor has the item. It is not the end of world, but I would say that browsing the catalog is easier to do on the desktop version of the catalog compared to the app.

I also rated Aspen Discovery as "somewhat satisfied" because the search function sometimes can be a little particular about spelling and typos. It seems that the catalog will sometimes give you decent search results if you slightly misspell an author or title, but other times you have to enter the title and author exactly correct or else the title will not show up. I am not sure why this is the case, but I have noticed that on and off with using aspen. I will sometimes need to search for a title in google or amazon and copy and paste it into Aspen. Again this is not the end of the world, it just makes searching for titles a little more time consuming sometimes.

Workflows hasn't had a significant upgrade since I started in libraries 10 years ago. The interface and functionality are dating themselves quickly, leading many of us to find "Workflows workarounds."

The only issues I have with WorkFlows and Aspen are when it crashes or lags a lot, which lately seems to be happening more often.

Workflows

1. In patrons record under Privilege and Status if a patron is blocked we can't directly choose to reinstate the user. First we need to select Barred status and override it (with Y), then we need to go back and choose Reinstate user. Why is Reinstate user not available as a choice from the beginning?
2. It would be great if we could have phone numbers entered in the same format (with dashes or without dashes) for both in patrons records phone number field and text field. Now when a patron tells their phone number and we enter it in the phone field with dashes,

we can't copy it to the text field, because it's not compatible with dashes for some reason. It would be more comfortable and efficient.

I find the LiDA app to be very laggy. It's often faster for me to open a browser on my phone and just log into the catalog.

Aspen Discovery still will sometimes not return relevant results, even if the search term is an exact title, if the book is newer or less popular. It often means having to go back and forth between Aspen and Workflows to track down items.

It would be nice to be able to share a link to the Aspen catalog entry for an item directly from the LiDA app. As is, you can click "More Info" at the bottom of a LiDA catalog entry and you will be redirected to the Aspen webpage for the "grouped record" for the item. But the "grouped record" page is usually not a very user-friendly catalog page for sharing.

It's not a huge deal, but it's kind of surprising that there is no feature (that I know of) in LiDA to directly share a URL to a catalog entry for an item. Attached is a screenshot of what a typical catalog entry looks like in LiDA!

Message Bee can be somewhat confusing to use. It's difficult to find the right area.

Blue Cloud Analytics -- I sometimes find it difficult to sift through all of the Shared Reports to find what I'm looking for. The My Reports folder option alleviates this for reports I use frequently but not when I'm looking for new to me reports.

LiDA app - I get frustrated with the slow load time especially when I'm getting ready to check out items.

BLUECloud analytics is useful but there is a strong learning curve with less than helpful documentation. The training and documentation listed here:

<https://support.swanlibraries.net/documentation/64727> is not useful to the majority of end users. You are not able to have someone to follow through the documentation and gain a working understanding of how to utilizing BCA for reporting. Additionally the training

materials are out of date with the getting started guide being almost 6 years old and the reference guide being 2.5 years old.

The sheer amount of folders in the Shared Reports section is overwhelming. There should be a filtering or at the very least an ability to hide reports/folders for end users. It is genuinely frustrating for our staff.

Unfortunately due to SWAN taking away our individual accounts, we all have to share a library account so I frequently receive feedback from staff that they are afraid to use certain areas of the reporting in case they break something for other users

Membership Satisfaction with SWAN Platform: survey results

Library	Worth Public Library District
Name	Rachel Snyder
Date submitted	3/13/2025 1:05:53 PM
WorkFlows rating	Satisfied
BLUEcloud Analytics rating	Satisfied
MobileCirc rating	No basis for judgement
LiDA rating	Satisfied
Aspen rating	Satisfied
MessageBee rating	Satisfied
OCLC rating	Satisfied
Your comments on rating	
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	7
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.	
File uploaded?	