SWAN Quarterly Meeting

June 5, 2025

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of new directors
4. Approval of minutes March
5. Board election
7. 2025 Platform survey analysis
8. Enhanced online patron registration
9. Inactive patron record removal overview
10. Announcements

SWAN Board election 2025

Election process & timetable

Election Process Announced	March 6, 2025 (Quarterly)
Online Self-Nominations Accepted	April 1 – 25, 2025
Names of Candidates Released	May 1, 2025
Electronic Ballot	May 5 – May 23, 2025
Results Announced	June 2, 2025
Elected Candidates invited to June SWAN Board Meeting	June 20, 2025
Candidates' Terms Begin	July 1, 2025
July Board Meeting	July 18, 2025

Election results

- Ben Weseloh, West Chicago Public Library District
- Laura Van Cleve, Richton Park Public Library District
- Ridgeway Burns, Itasca Community Library

Thank you for serving!

- Anna Wassenaar, Blue Island Public Library
- Colleen Waltman, Homewood Public Library
- Jessee Blazek, Palos Heights Public Library

Membership Satisfaction Survey 2025

Aaron Skog, Executive Director

Jennifer Cottrill, Board President

Membership satisfaction survey

Goal of survey

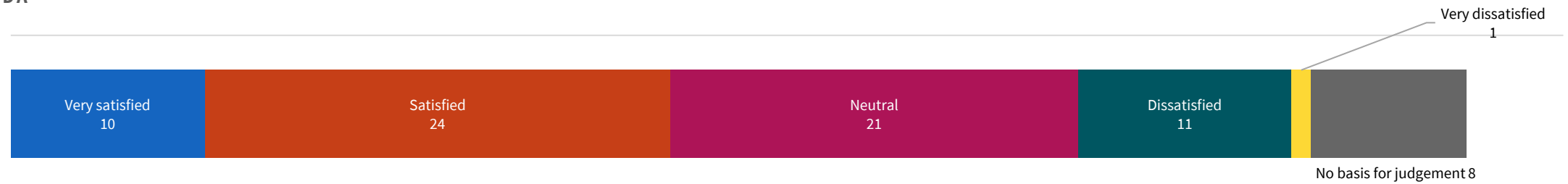
- Open to 100 library directors to complete
- Rate the satisfaction of products
- Revised rating for 2025
  - Very satisfied
  - Satisfied
  - Neutral
  - Dissatisfied
  - Very dissatisfied

Platforms

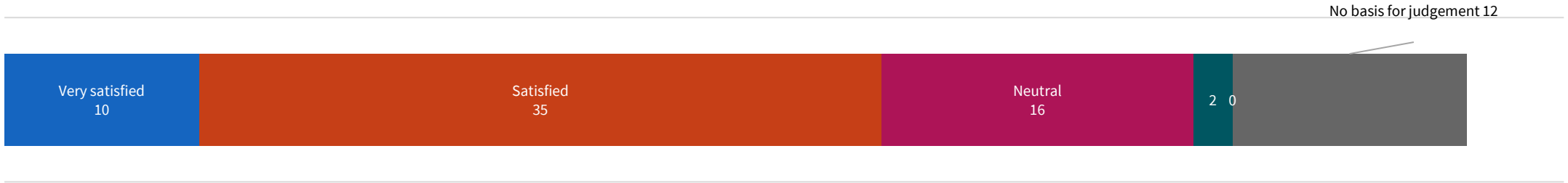
1. WorkFlows
2. BLUEcloud Analytics
3. MobileCirc/MobileStaff
4. LiDA
5. Aspen Discovery
6. MessageBee
7. WorldShare ILL & WorldCat Discovery

WORKFLOWS
Very satisfied 15
Satisfied 27
Neutral 21
Dissatisfied 10
Very dissatisfied 2
BLUECLOUD ANALYTICS
Very satisfied 8
Satisfied 37
Neutral 16
Dissatisfied 9
Very dissatisfied 2
No basis for judgement 3
MOBILESTAFF
Very satisfied 3
Satisfied 11
Neutral 17
Dissatisfied 8
Very dissatisfied 4
No basis for judgement, 32
ASPEN
Very satisfied 14
Satisfied 37
Neutral 11
5
2
6

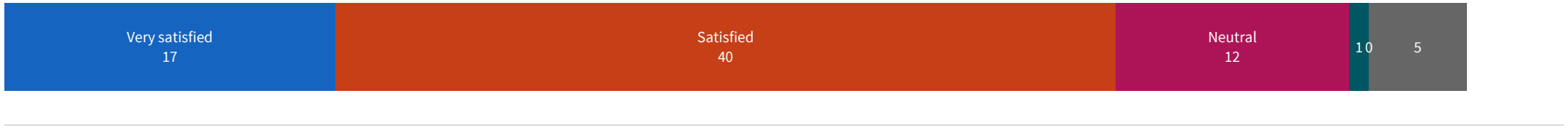
LIDA



MESSAGEBEE



OCLC WORLDSHARE



Average ratings

WorkFlows score	2.43
BLUEcloud Analytics score	2.44
MobileCirc score	2.98
LiDA score	2.54
Aspen Discovery score	2.19
MessageBee score	2.16
OCLC WorldShare score	1.96

Very satisfied	1.00 - 1.80
Satisfied	1.81 - 2.60
Neutral	2.61 - 3.40
Dissatisfied	3.41 - 4.20
Very dissatisfied	4.21 - 5.00
No basis for judgement	

Recommended Action Steps to the SWAN Board

I. **Addressing core usability and efficiency Issues:**

   a) **WorkFlows Improvement Initiative:**

      i) **Develop a WorkFlows customization working group**

      ii) **Document and share WorkFlows best practices and workarounds**

   b) **BLUEcloud Analytics optimization:**

      i) **Appoint a BLUEcloud Analytics power user group**

      ii) **Standardize and streamline report structures**

      iii) **Develop targeted BLUEcloud Analytics training modules**

      iv) **Investigate user interface enhancements**

II. **Enhancing the patron experience (LiDA and Aspen):**

   a) **SWAN Libraries + app (LiDA) performance and feature parity:**

      i) **Investigate and address slow load times**

      ii) **Resolve frequent logout issues**

      iii) **Implement consistent availability displays**

      iv) **Explore adding popular Aspen features to LiDA**

   b) **Aspen Discovery refinement:**

      i) **Address stability and downtime concerns**

      ii) **Improve search filter precision**

      iii) **Enhance media format labeling**

      iv) **Investigate improvements to staff administration features**

      v) **Explore displaying movie run-time**

Recommended Action Steps to the SWAN Board

III. Optimizing outreach and services:

- a) Mobile Circ/Mobile Staff Re-evaluation:
  - i) Gather further input from library service desks
  - ii) Explore alternative mobile solutions
  - iii) Provide targeted MobileCirc training
- b) E-content enhancements:
  - i) Advocate for improved integration with Libby
  - ii) Explore expanding app functionality
  - iii) Review and optimize third-party integrations

IV. Improving communication and training:

- a) Develop a comprehensive training plan
- b) Establish regular feedback mechanisms

V. Strategic system considerations:

- a) Acknowledge and address long-term ILS concerns
- b) Balance information security and performance

SWAN Expo Friday, August 22, 2025

SWAN Expo

- SWAN invites members and non-members alike to join us for our SWAN Expo annual conference
- This all-day event features a variety of speakers, sessions, and library vendors
- A wonderful opportunity to network with library colleagues
- John Chrastka, EveryLibrary Institute, keynote speaker
- Moraine Valley Community College Business & Conference Center
- Friday, August 22nd
- Next year: NIU in Naperville

Expo 2025 sessions

Circulation Services: Workflow Improvements through Technology

Presented by Jasmina Lapo, St. Charles Public Library District

Discover More with Aspen

Presented by Cynthia Romanowski and Tara Wood, SWAN

Essential Library Tools: Illinois Statewide EBSCO Database Access and Features

Presented by Olivia Montolin, SWAN

Opening Doors: Embracing Patron-Focused Practices

Presented by Cindy Maiello Gluecklich, Indian Prairie Public Library District, Andrew Riis, Eisenhower Public Library

Symphony Inventory Demystified: The Purpose and Process

Presented by Joy Anhalt, Tinley Park Public Library

RAILS Delivery: Bins, Bags and Beyond!

Presented by Mark Hatch, RAILS

So You Want to Host a Mini ComicCon at Your Library

Presented by Elaina Dague and Jenny Yasecko, Oak Lawn Public Library

WorkFlows Detectives: Mysteries from the Stacks

Presented by Sam Dietel, Helen Pinder, and Crystal Vela, SWAN

SWAN Notifications from the Ground Up

Presented by SWAN staff

SWAN Support: How We Can Help

Presented by Ian Nosek & Scott Brandwein, SWAN

Roundtables

How are you using AI in your library?

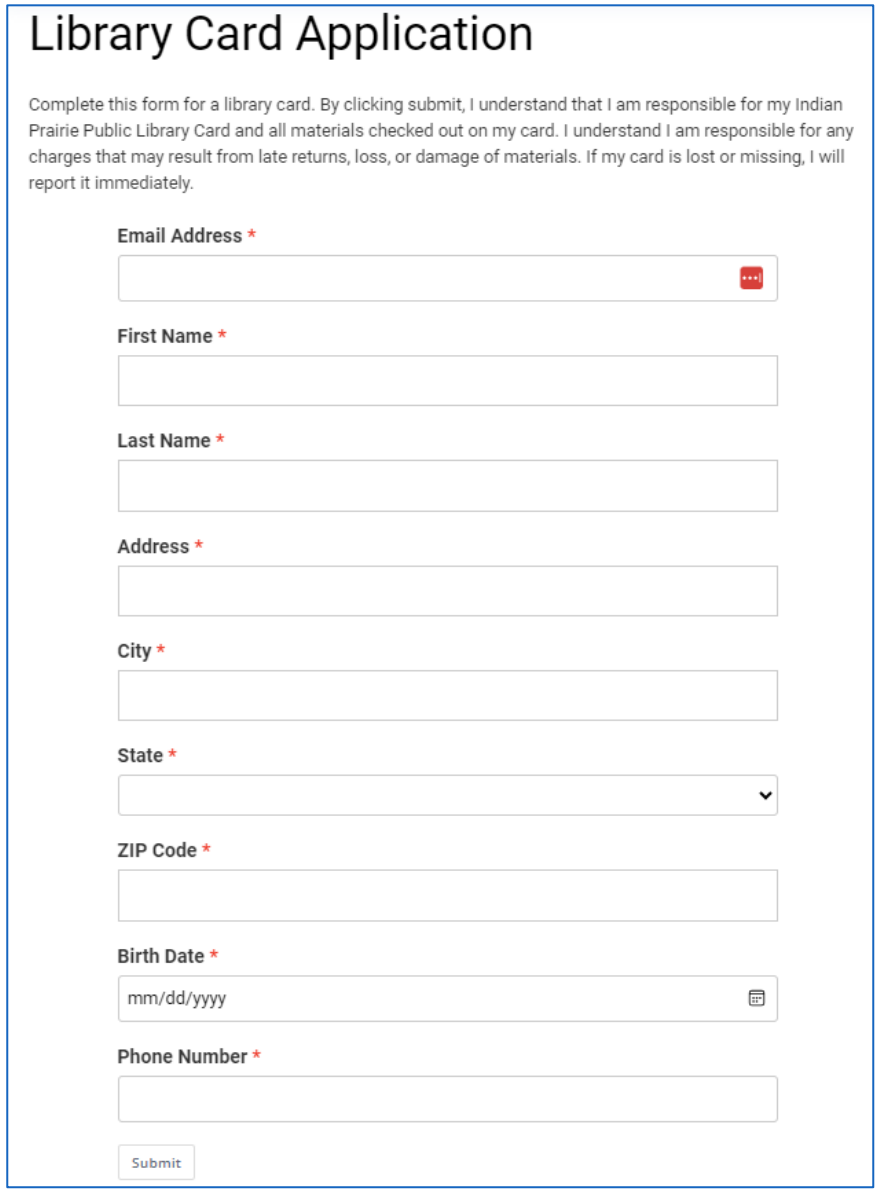
Library of Things: Share, Discover, and Reimagine Your Collection

Online patron registration

Tara Wood, SWAN User Experience Manager

Set up is in progress!

- Features will include:
  - One shared online form that routes patrons to the correct home library
  - Welcome email to new patrons with custom library information and links
  - Address & GIS verification
  - Identity verification – can issue full access cards online
  - Duplicate checking, existing card information
  - Minor registration



Library Card Application

Complete this form for a library card. By clicking submit, I understand that I am responsible for my Indian Prairie Public Library Card and all materials checked out on my card. I understand I am responsible for any charges that may result from late returns, loss, or damage of materials. If my card is lost or missing, I will report it immediately.

Email Address *

First Name *

Last Name *

Address *

City *

State *

ZIP Code *

Birth Date *

mm/dd/yyyy

Phone Number *

Submit

Timeline

June–July 2025

Configuration

June 16th

Patron profile confirmation

July 16th

Circulation Working Group Activity

Late July

User Testing

Mid-August

Training and Q&A

August 26th

Go Live

Verification Steps

1. Fraud Check: Scored from 0 to 500 for fraud risk. (Adjustable threshold)*
2. Identity Check: Must match on one of many data pairings.*
3. Symphony duplicate checking.
4. Geofence check.

*Uses MasterCard Identity Check.

Discussion

Inactive patron removal process: recap & overview

Purposes of automation of record removal

Keep the database as clean and efficient as possible

Avoid retaining personally identifiable information unnecessarily

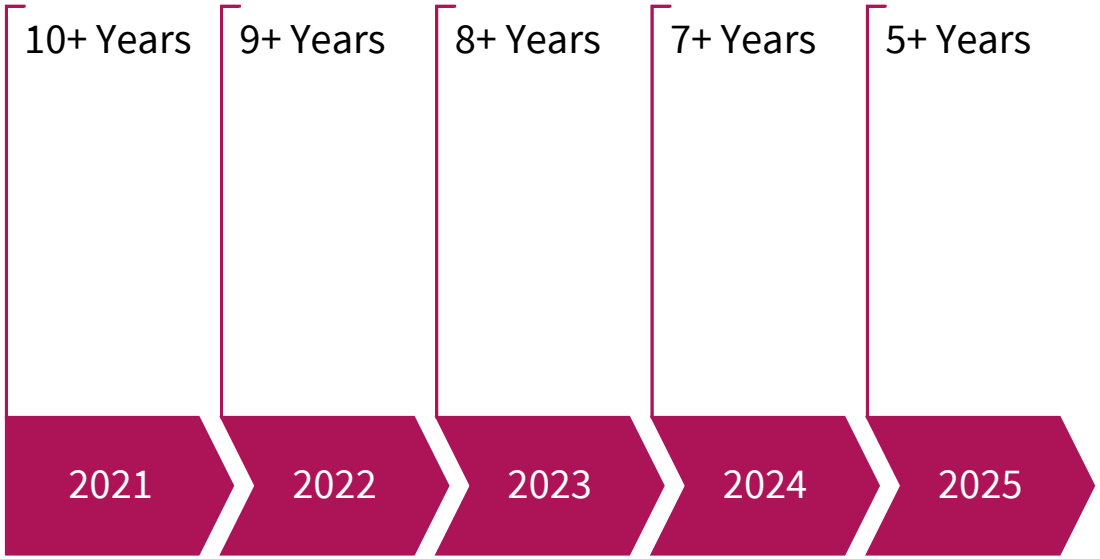
Reduce library staff time necessary for record maintenance

Timeline

End of 2019
Plan to automate record removal at 3+ years inactivity/expiration. Patrons with bills over $200 would be retained.
2020
Pandemic postpones the record purge plan.
May–June 2021
Discussion on forums and June Quarterly leads to rethinking plan.
Fall 2021
Implementation of current removal process, starting with 10+ year inactivity threshold with gradual reduction.
2025
Final goal of purge after 5+ years inactivity is reached. Patrons with bills over $100 still retained.

Last Activity Date

- Planned reduction over time from 10+ years to 5+ years.
- No further adjustments are planned



Final Criteria

Patron records will be candidates for removal if and only if:

- Last Activity Date is over 5 years in the past.
- Total of patron's bills is less than $100.

The 2025 Jump

Reasons for large 2025 removal numbers:

1. Two-year change in purge threshold.
2. 2018 NCOA processing updated Last Activity Date (LAD)
   - Many of these records would have been purged prior to now

Processes that update Last Activity Date

- Checking in/out or renewing an item
- Placing/Editing/Removing a hold
- Marking an item lost
- Billing a user or paying a bill
- Creating a user
- Editing address information
- Authenticating via OpenAthens
- Authenticating via SIP2 (self-checks, computer reservation, OverDrive login activity)

Removal of Old Bills

SWAN has recommended removal of bills over 10 years old

We understand concerns about certain bad actors

Retaining certain delinquent accounts can protect you and other SWAN libraries

Documentation

Monthly Patron Record Purge - https://support.swanlibraries.net/documentation/87627

Patron Last Activity Date - https://support.swanlibraries.net/documentation/94872

Includes review of BLUEcloud Analytics reports and review tasks.

Announcements & Questions

RAILS delivery & SWAN libraries

- Sorting delays in RAILS Bolingbrook service center
- Transitioned from delivery contractor to RAILS staff
- Staffing shortage experienced around same time
- Utilizing temporary staffing
- Delivery bins replacement planned

Reminder! RAILS Flagship Renewal

As of 6/4, RAILS has not heard from 3 libraries.

If you have not yet contacted RAILS about renewing or discontinuing your Flagship Package of EBSCO databases, please get in touch ASAP – the deadline to renew was May 31st.

The Flagship Package includes ConsumerReports.org and Novelist Plus, and 6 additional databases.

Contact deals@railslibraries.org.

Other announcements?