



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

Meeting Packet

June 5, 2025

10:00 A.M.



SWAN Administrators' & Directors' Quarterly Meeting

June 5, 2025

10:00 a.m. – 12:00 p.m.

Oak Brook Public Library

600 Oak Brook Road, Oak Brook, IL 60523

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

<https://swanlibraries-net.zoom.us/meeting/register/tZ0qc-2spj8uEtO1vX9yUP59s7WaqyVFxZd8#/registration>

Agenda

1. Call to Order and Welcome
2. Public Comment
3. Introduction of New Library Directors
4. Action Item – Approval of the March 5, 2025 Quarterly meeting minutes
5. Information Item—Board election results
6. Discussion Item—SWAN 2025 platform survey
7. Information Item—SWAN annual conference: Expo update
8. Information Item—Online patron registration project update
9. Information Item—Inactive patron record removal process overview
10. Announcements and Questions
11. Next meeting: September 4, 2025

Member Comment after each agenda item. The Quarterly Meeting will be live streamed via Zoom.

SWAN Administrators' Quarterly Meeting Minutes

10:00 a.m. – 12:00 p.m.
Oak Brook Public Library
600 Oak Brook Road, Oak Brook, IL 60523

1. Call to Order and Welcome

President Cottrill called the meeting to order at 10:01 a.m. Blazek, Bussey, Cottrill, Johnson, Musil, Waltman, Wassenaar were present to establish a board quorum.

2. Public Comment

No public comment.

3. Introduction of New Library Directors and Visitors

None

4. Action Item – Approval of the September 5, 2024, Quarterly meeting minutes

Weseloh (West Chicago Public Library District) motioned, seconded by Musil (Tinley Park Public Library). Motioned carried by unanimous voice vote.

5. Action Item – Approval of the December 5, 2024, Quarterly meeting minutes

Waltman (Homewood Public Library) motioned, seconded by Milavec (Downers Grove Public Library). Motioned carried by unanimous voice vote.

6. Information Item – Board Elections for 2025

Skog discussed the timeline for the three SWAN governing board seats.

7. Information Item – Enhanced online patron registration for SWAN libraries

Tara Wood reviewed the Online Patron Registration Research as outlined in the packet.

8. Action Item – Approval of the fiscal year 2026 budget & membership fee

The approval took place along with an overview from Skog.

Cottonaro (Alsip-Merrionette Park Public Library District) motioned, seconded by Johnson (Roselle Public Library). Voting results: 31 YES, 0 NO, 69 ABSENT, motion passed.

9. Discussion Item –SWAN Board Environmental task Force report & recommendation

Skog reviewed the SWAN Board Environmental Task Force report & recommendation as presented in the board packet.

10. Information Item- SWAN 2025 platform survey

The SWAN 2025 platform survey was reviewed as outlined in the packet.

11. Information Item – Overview of transition to new helpdesk platform

Scott Brandwein discussed the helpdesk system benefits, and the next steps as outlined in the packet.

12. Announcements and Questions

Julie Milavec (Downers Grove Public Library) announced that she will be retiring March of 2026.

13. Next Meeting: June 5, 2025

Cottrill ended the meeting at 11:37 a.m.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

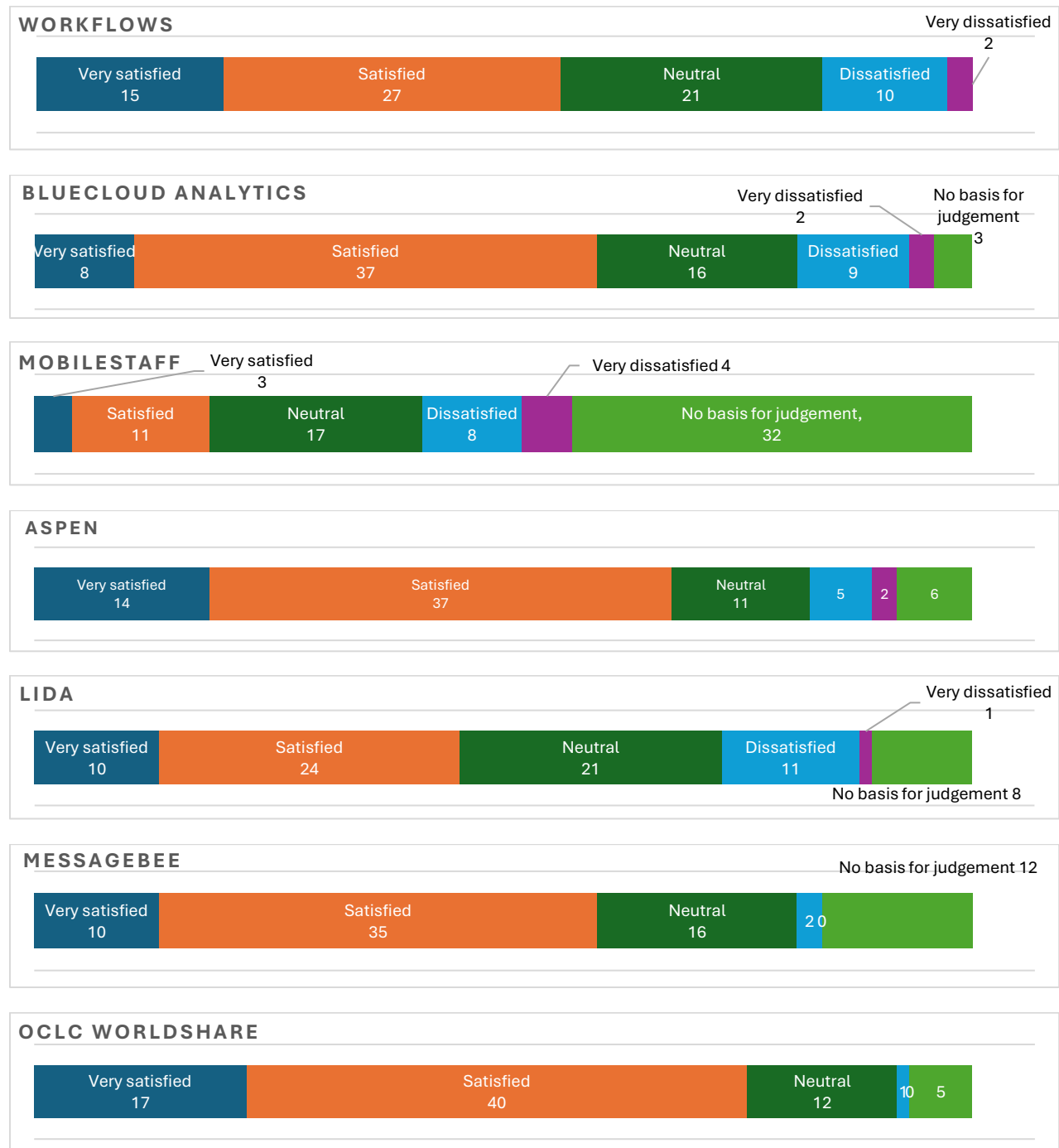
SWAN

Membership Satisfaction with Library Services Platform: 2025

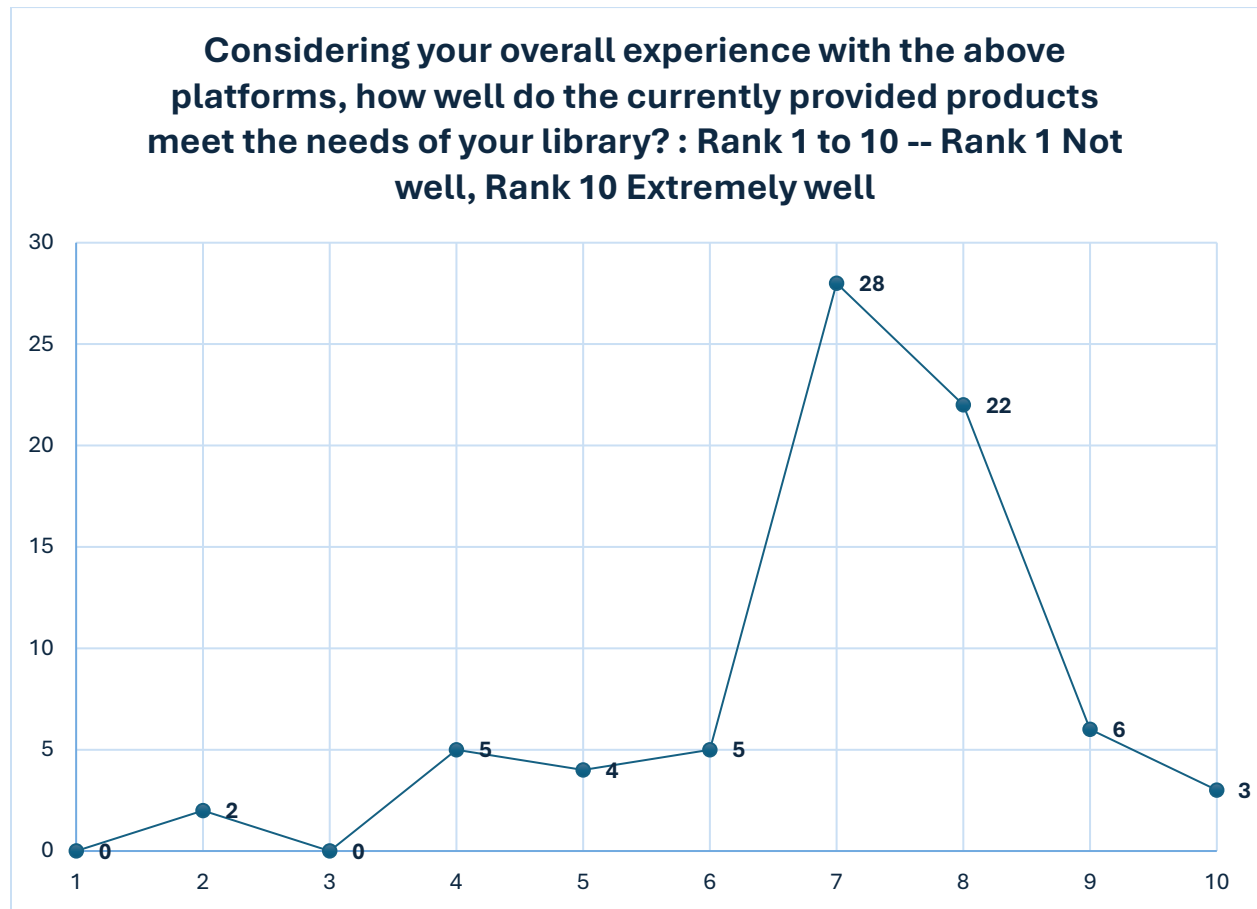
Analysis of the ratings, rankings, &
comments

Produced by Aaron Skog, Cynthia Romanowski, Ian
Nosek, Tara Wood, Scott Brandwein
4-11-2025

Bar chart comparisons by service platform

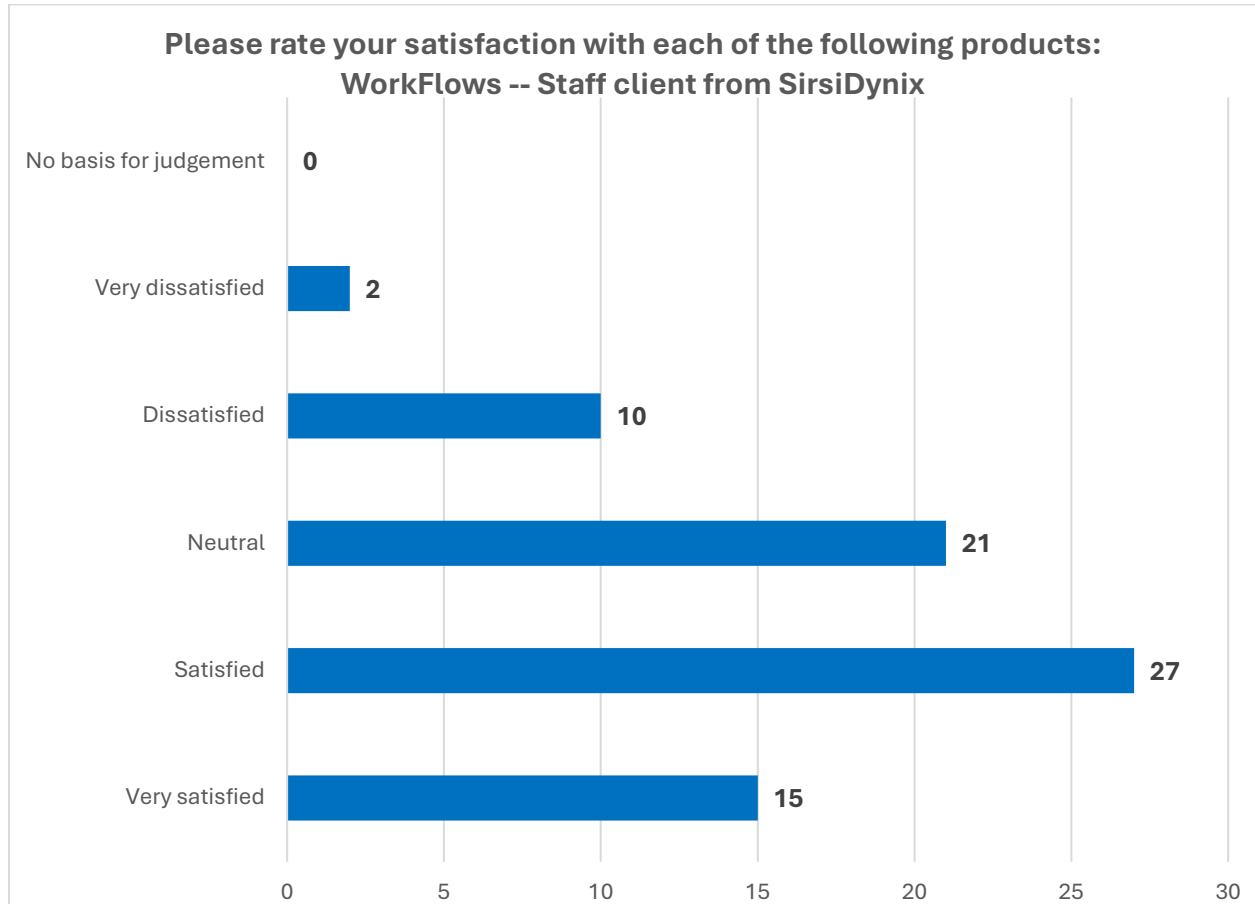


Overall experience: 2025 ranking



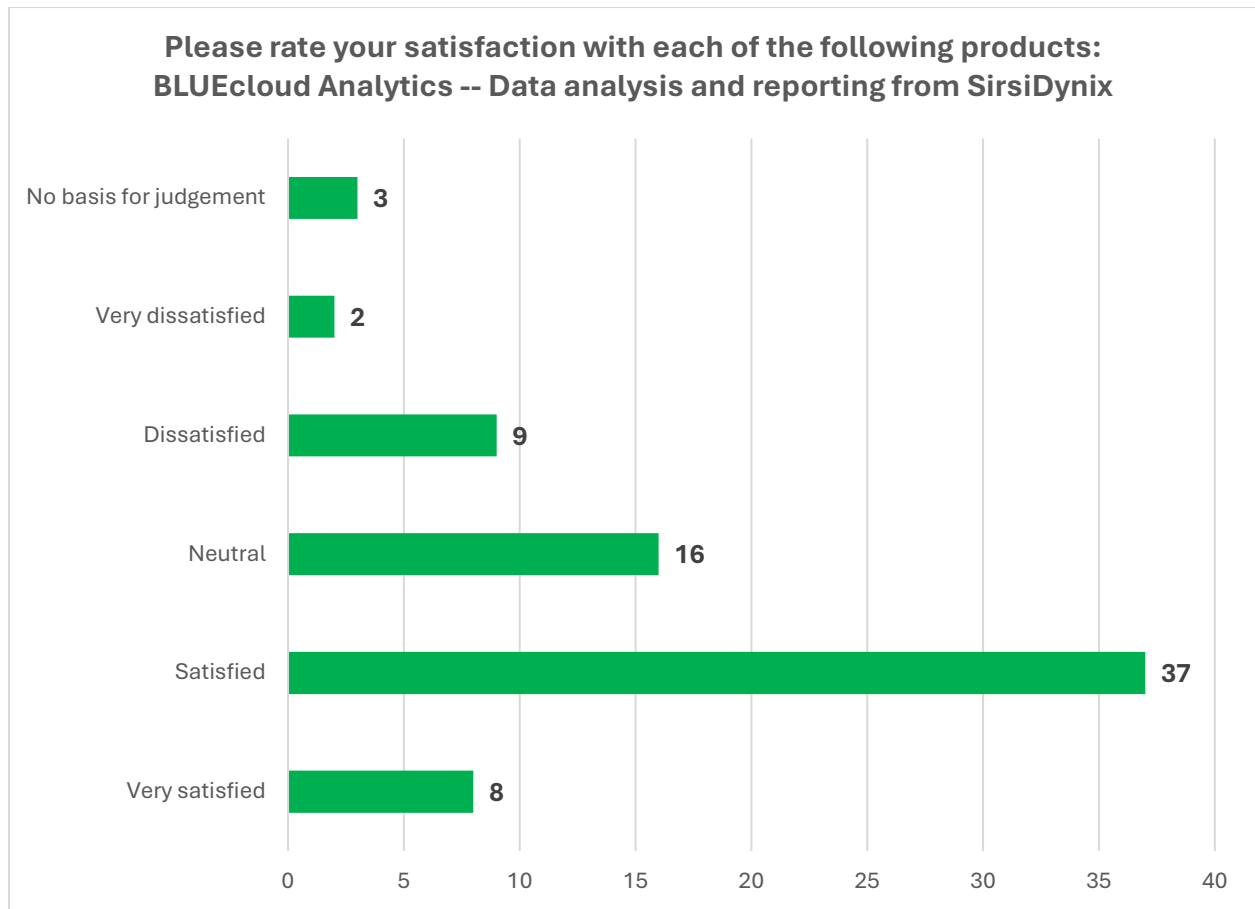
Considering your overall experience with the above platforms, how well do the currently provided products meet the needs of your library? : Rank 1 to 10 -- Rank 1 Not well, Rank 10 Extremely well	Membership Ranking Counts	% of total
1	0	0%
2	2	3%
3	0	0%
4	5	7%
5	4	5%
6	5	7%
7	28	37%
8	22	29%
9	6	8%
10	3	4%
	75	100%

WorkFlows



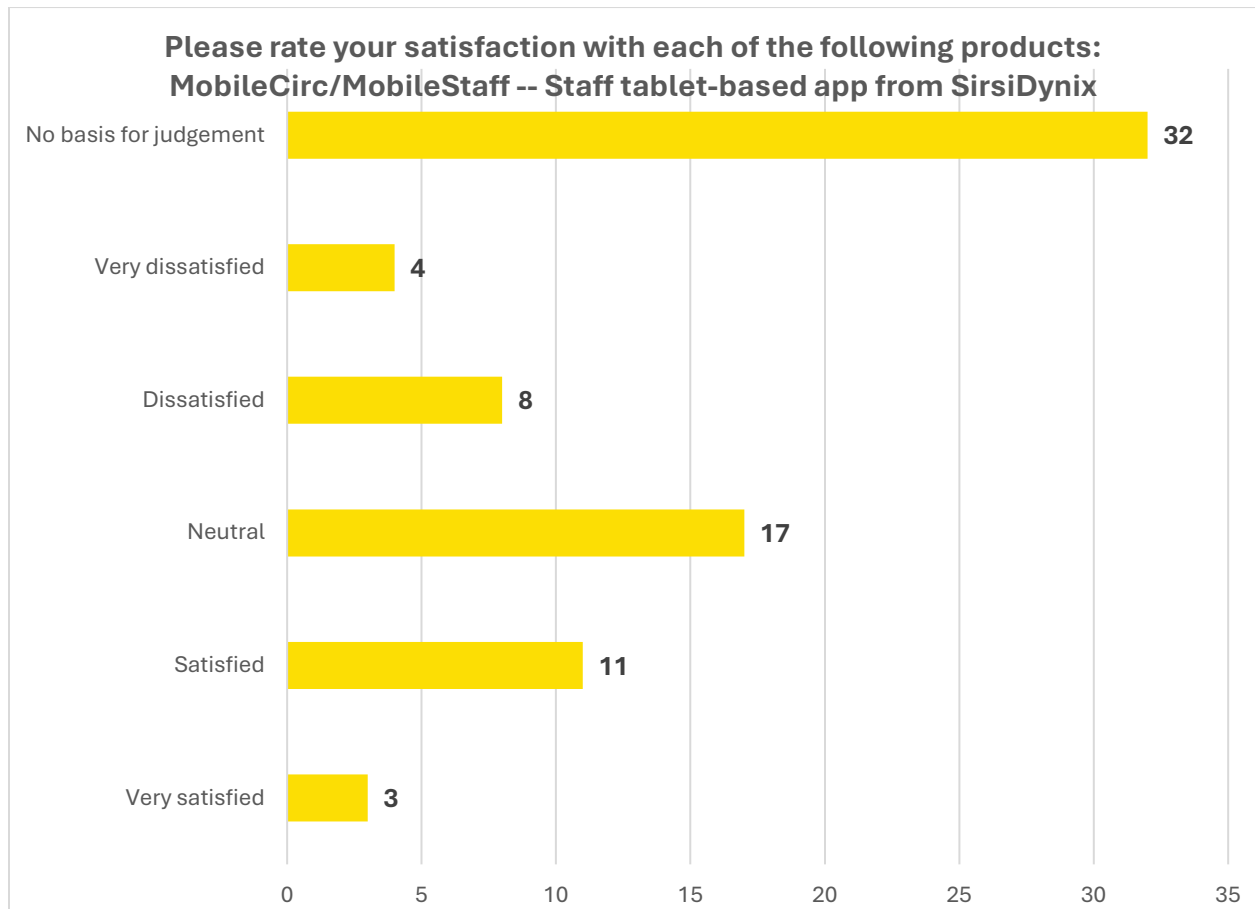
Please rate your satisfaction with each of the following products: WorkFlows -- Staff client from SirsiDynix	Response Counts	WorkFlows score
Very satisfied	15	15
Satisfied	27	54
Neutral	21	63
Dissatisfied	10	40
Very dissatisfied	2	10
No basis for judgement	0	0
Number of respondents	75	2.43
WorkFlows average score result:		Satisfied

BLUEcloud Analytics



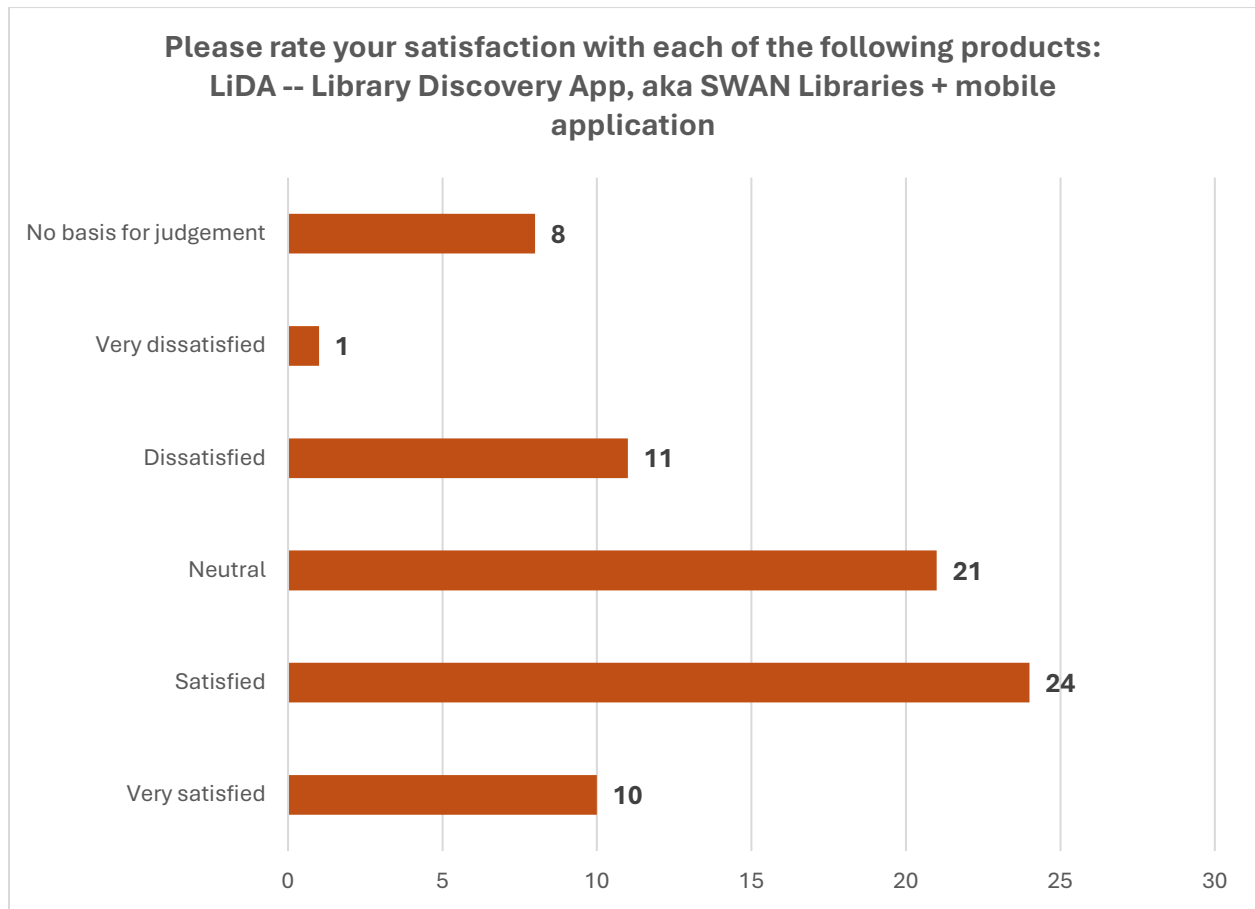
Please rate your satisfaction with each of the following products: BLUEcloud Analytics -- Data analysis and reporting from SirsiDynix	Response Counts		BLUEcloud Analytics score
Very satisfied	8		8
Satisfied	37		74
Neutral	16		48
Dissatisfied	9		36
Very dissatisfied	2		10
No basis for judgement	3		0
Number of respondents	72		2.44
BLUEcloud Analytics average score result:			Satisfied

MobileStaff



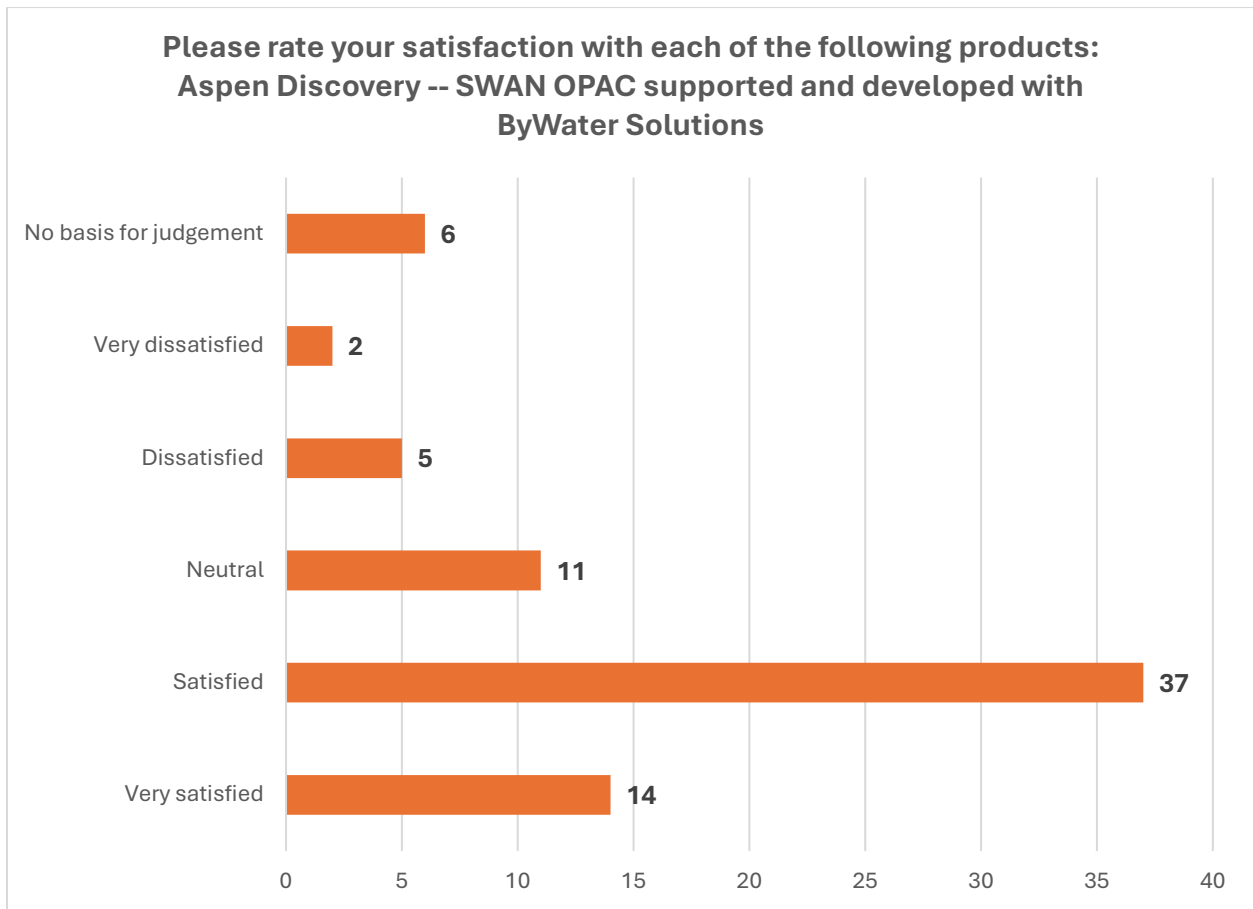
Please rate your satisfaction with each of the following products: MobileCirc/MobileStaff -- Staff tablet-based app from SirsiDynix	Response Counts	MobileCirc score
Very satisfied	3	3
Satisfied	11	22
Neutral	17	51
Dissatisfied	8	32
Very dissatisfied	4	20
No basis for judgement	32	0
Number of respondents	43	2.98
MobileCirc average score result:		Neutral

LiDA



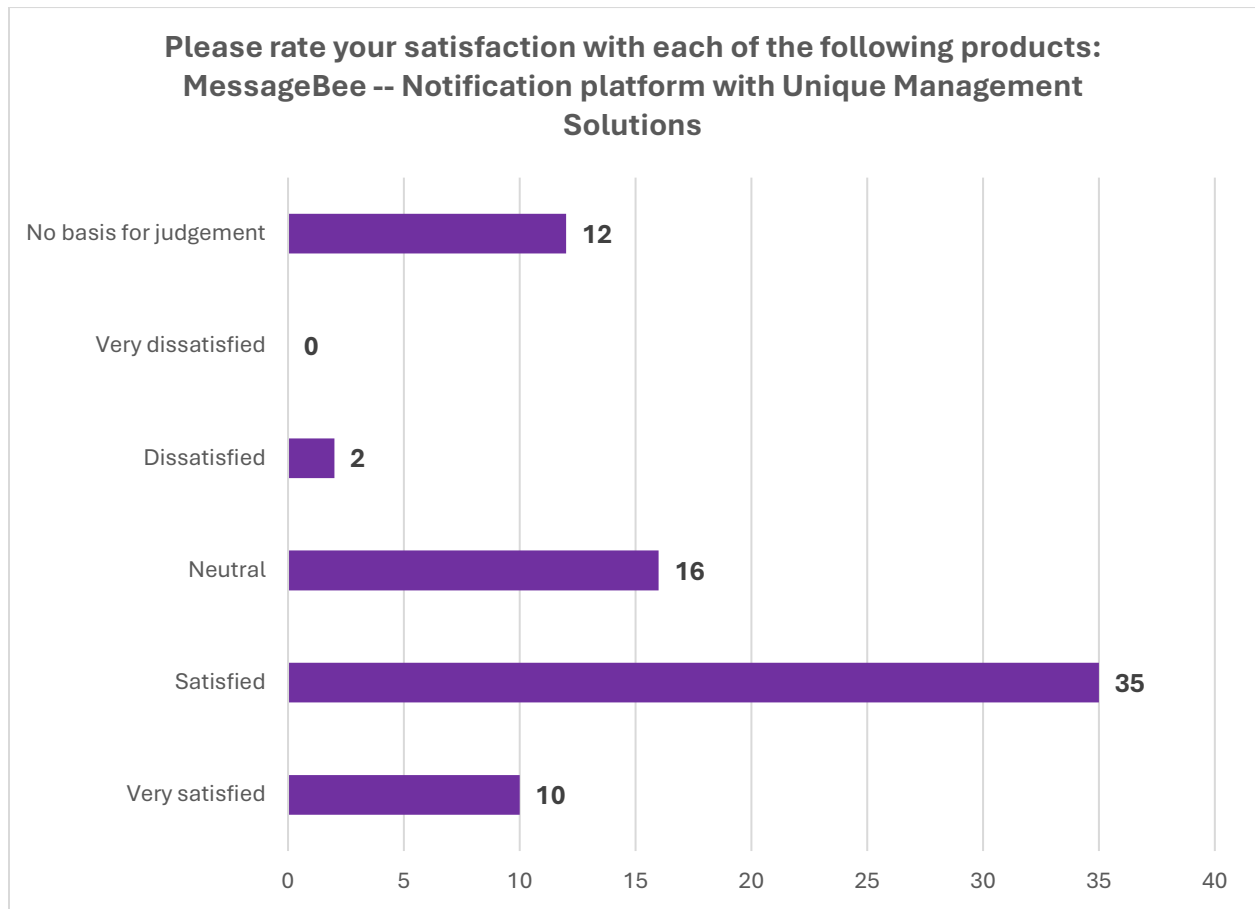
Please rate your satisfaction with each of the following products: LiDA -- Library Discovery App, aka SWAN Libraries + mobile application	Response Counts	LiDA score
Very satisfied	10	10
Satisfied	24	48
Neutral	21	63
Dissatisfied	11	44
Very dissatisfied	1	5
No basis for judgement	8	0
	67	2.54
LiDA average score result:		Satisfied

Aspen Discovery



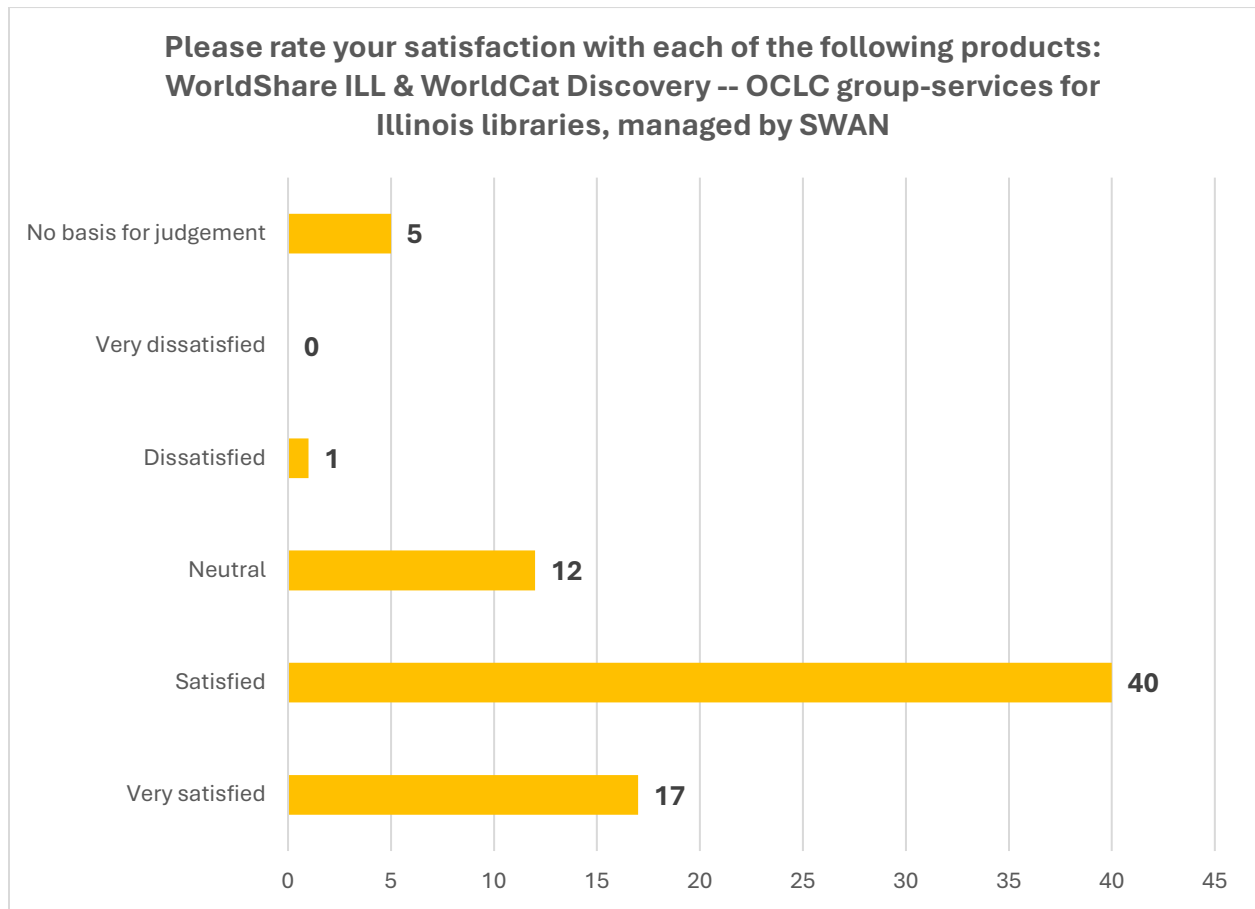
Please rate your satisfaction with each of the following products: Aspen Discovery -- SWAN OPAC supported and developed with ByWater Solutions	Response Counts	Aspen Discovery score
Very satisfied	14	14
Satisfied	37	74
Neutral	11	33
Dissatisfied	5	20
Very dissatisfied	2	10
No basis for judgement	6	
	69	2.19
Aspen Discovery average score result:		Satisfied

MessageBee



Please rate your satisfaction with each of the following products: MessageBee -- Notification platform with Unique Management Solutions		
	Response Counts	MessageBee score
Very satisfied	10	10
Satisfied	35	70
Neutral	16	48
Dissatisfied	2	8
Very dissatisfied	0	0
No basis for judgement	12	0
	63	2.16
MessageBee average score result:		Satisfied

OCLC WorldShare & WorldCat



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 WorldShare score
Very satisfied	17	17
Satisfied	40	80
Neutral	12	36
Dissatisfied	1	4
Very dissatisfied	0	0
No basis for judgement	5	0
	70	1.96
OCLC WorldShare average score result:		Satisfied

Summary of survey comments

Overall System Satisfaction and Usability

Survey respondents expressed mixed views on SWAN's library services platforms. While some products, such as MessageBee and WorldShare ILL & WorldCat Discovery, generally received positive feedback, there were recurring concerns about the usability and efficiency of other systems. Specifically, WorkFlows and BLUEcloud Analytics were frequently described as "clunky," "unintuitive," and difficult to navigate, leading to frustration and increased staff training time. Aspen Discovery and LiDA were generally well-received for their user-friendly interfaces, but also faced criticism related to stability, search functionality, and feature parity between the browser and app versions.

WorkFlows

WorkFlows was often cited as a source of frustration, with comments highlighting its inefficient search functionality, inability to handle typos, and outdated interface. Staff reported using workarounds and expressed a desire for customization options to streamline workflows and remove unused features.

BLUEcloud Analytics

BLUEcloud Analytics was acknowledged for its comprehensive reporting capabilities, but users found it difficult to navigate and customize reports. The complexity of the interface and the need for repeated option selections were common complaints.

LiDA

The LiDA app received positive feedback for its digital card and hold placement features. However, concerns were raised about slow load times, frequent logouts, and inconsistencies in functionality compared to the browser version, particularly regarding item availability displays.

Aspen Discovery

Aspen Discovery was praised for its user-friendly interface, cover displays, and features like Masquerade Mode. However, respondents reported issues with stability, and search result accuracy. The need for improved search filters and runtime information for media items was also noted.

Mobile Circ/Mobile Staff

This platform received limited use and mixed reviews. Concerns were raised about its clunkiness and limitations, such as the inability to place holds.

MessageBee

MessageBee was generally well-regarded for its ease of use and communication capabilities. However, some respondents (six libraries) expressed a desire for improved notification features, such as reinstating renewal notices.

OCLC WorldCat and WorldShare

WorldCat and WorldShare were easy to use, and in general, the library staff appreciated the efforts SWAN has put in to make ILL run efficiently. Another library stated that WorldCat Discovery and WorldShare ILL required huge learning curves, however once mastered, find them very helpful. Some respondents expressed difficulty in searching for materials, especially if there were typos, and seeing other library holdings.

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:** Include staff representatives to identify and prioritize customizable elements, such as wizard options and display fields, to streamline the interface.
- ii) **Document and share WorkFlows best practices and workarounds:** Create accessible training materials and internal knowledge bases to disseminate effective techniques identified by experienced staff.

b) BLUEcloud Analytics optimization:

- i) **Appoint a BLUEcloud Analytics power user group:** Gather individuals with regular experience to analyze current reporting workflows and identify areas for simplification.
- ii) **Standardize and streamline report structures:** Based on frequently requested data, work with SWAN to develop standardized report templates with clear naming conventions and descriptions. Explore the feasibility of pre-selecting common filters (e.g., library-specific data).
- iii) **Develop targeted BLUEcloud Analytics training modules:** Create role-specific training focusing on the most commonly used reports and navigation techniques. Offer advanced sessions for users needing more complex data extraction.
- iv) **Investigate user interface enhancements:** Provide feedback to SirsiDynix regarding the perceived density and disorganization of the interface, suggesting potential improvements for navigation and report discovery.

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

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

- i) **Investigate and address slow load times:** Work with Grove for Libraries (SWAN's new hosting provider) to diagnose and resolve the technical issues causing slow loading. Monitor app performance after any updates.
- ii) **Resolve frequent logout issues:** Prioritize identifying the root cause of the automatic logouts and implement a permanent fix.
- iii) **Implement consistent availability displays:** Ensure the LiDA app displays item availability information (including owning libraries) with the same clarity and ease of browsing as the browser version of the catalog.
- iv) **Explore adding popular Aspen features to LiDA:** Investigate the feasibility and user demand for integrating features like "More Like This" recommendations and a staff view into the LiDA app.

b) Aspen Discovery refinement:

- i) **Address stability and downtime concerns:** Work closely with Grove for Libraries to identify and resolve the causes of instability and unplanned downtime. Implement proactive monitoring.
- ii) **Improve search filter precision:** Analyze user search behavior and refine search filters to reduce irrelevant results while still accommodating variations in search terms.
- iii) **Enhance media format labeling:** Review and refine the labeling of media formats (e.g., "Audiobook CD" vs. "CD Audiobook") to minimize patron confusion during hold placement.
- iv) **Investigate improvements to staff administration features:** Document a clear and repeatable process for library staff administration within Aspen and provide updated training to relevant staff.
- v) **Explore displaying movie run-time:** Investigate the feasibility of including movie run-time information in the catalog records displayed in Aspen.

III. Optimizing outreach and services:

a) Mobile Circ/Mobile Staff Re-evaluation:

- i) **Gather further input from library service desks:** Conduct a focused discussion to understand the specific challenges and needs related to off-site circulation and hold management.

- ii) **Explore alternative mobile solutions:** If MobileCirc continues to be problematic, research and evaluate alternative mobile circulation applications that better meet the needs of outreach activities.
 - (1) Approach a vendor such as MeeScan to see if options are available.
 - (2) Consider Grove for Libraries for a custom built application.
- iii) **Provide targeted MobileCirc training:** If the SirsiDynix is retained, offer comprehensive training to address the reported difficulties, particularly with checkout procedures and hold placement.
 - (1) Create a MobileCirc kit for lending to libraries, which would include a scanner, keyboard, and printer.

b) E-content enhancements:

- i) **Advocate for improved integration with Libby:** Communicate user feedback to SWAN and OverDrive regarding a more seamless transition between the SWAN app and Libby for accessing eBooks.
- ii) **Explore expanding app functionality:** Investigate the feasibility and user interest in adding features like program registration, links to online resources, and mobile printing options to the SWAN Libraries + app.
- iii) **Review and optimize third-party integrations:** Address the reported issues with API configurations with vendors like cloudLibrary and Boundless to ensure seamless access to all resources.

IV. Improving communication and training:

- a) **Develop a comprehensive training plan:** Create a tiered training program for all library systems, including introductory sessions for new staff and advanced workshops for experienced users. Utilize a variety of formats (in-person, online modules, recorded sessions).
 - i) Promote the existing SWAN training on SWAN service platforms at SWAN events such as Fireside and user group meetings
 - ii) Promote app awareness to ensure all library staff are knowledgeable about the SWAN Libraries + app and can effectively recommend it to patrons.
- b) **Establish regular feedback mechanisms:** Implement ongoing channels for staff to provide feedback on the library systems and training needs (e.g., regular surveys, dedicated feedback forms).

V. Strategic system considerations:

- a) **Acknowledge and address long-term ILS concerns:** Recognize the expressed desire for a more modern and user-friendly ILS staff interface. Initiate preliminary research into recent procurement and inquiry methods, keeping staff feedback and evolving library needs in mind.
- b) **Balance information security and performance:** Enhancements and ideas collected through feedback must be weighed against the evolving threats, e.g., multi-factor authentication versus ease of use to library staff. Cyberthreats are a growing concern for the public sector of local governances which include public libraries.

By implementing these action steps, SWAN can address the identified pain points, improve staff efficiency, enhance the patron experience, and strategically plan for future technology needs. It is crucial to prioritize these steps based on their potential impact and feasibility, and to involve staff in the implementation process.

Strategic considerations

The following are ideas generated from discussion with SWAN management team.

New library staff interface: The question of whether SWAN should enter into a bidding process for a new integrated library system and staff interface should be weighed against the success of the SirsiDynix initiative BLUEcloud Accelerate which will speed up software development of the web-based staff interface. Under this scenario, the Symphony ILS would be retained along with its reliability and valued company support would remain within the SWAN library services platform, but a new staff interface would replace WorkFlows.

Comments within the 2025 survey reflect a need to balance benefits of the current ILS against a new interface.

- “SWAN has done a lot of work behind the scenes customizing, maximizing, and understanding each product, especially WorkFlows. Before choosing products with prettier interfaces, I hope the members consider the progress SWAN has made with current products and realize it will take SWAN [staff] some time to learn the new systems and tweak them for our vast needs.”
- “We are lucky that we have been using SirsiDynix software for a long time, and it is mostly scalable to our very large consortium. We utilize a lot of features that would be greatly missed if we moved to a different ILS and these features were not guaranteed. We've built our [library] workflow around the tools offered through SirsiDynix.”

- “Workflows and [BLUEcloud Analytics] feel like portals to the past. When surveyed, library staff report their mild satisfaction with these platforms, but they have also spent decades configuring workarounds and exceptions in order to get the software to do what they need it to do. As a library director, I am bothered by the amount of time it takes to train new staff on either platform and the amount of continuing education it takes to use [BLUEcloud Analytics] and this is a burden on our current staffing. It is time to search for a new ILS.”

Patron notification: SWAN does not recommend at this time revisiting the integration of autorenewal SMS and email notifications, but this could be revisited if a new ILS platform is implemented in the future.

Simplifying eBooks & eContent: The Palace Project is a library eBook and audiobook solution created and managed by libraries. SWAN should consider this as a solution to simplify the e-content strategy for its member libraries. Palace Project integration will allow SWAN patrons to reduce the number of mobile apps needed for the various e-content used by libraries.

Participating Libraries

1. Acorn Public Library District
2. Addison Public Library
3. Batavia Public Library District
4. Beecher Community Library District
5. Bellwood Public Library
6. Berkeley Public Library
7. Berwyn Public Library
8. Bloomingdale Public Library
9. Blue Island Public Library
10. Bridgeview Public Library
11. Calumet City Public Library
12. Carol Stream Public Library
13. Chicago Ridge Public Library
14. Cicero Public Library
15. Crestwood Public Library District
16. Crete Public Library District
17. Downers Grove Public Library
18. Eisenhower Public Library District
19. Elmwood Park Public Library
20. Evergreen Park Public Library
21. Flossmoor Public Library
22. Forest Park Public Library
23. Frankfort Public Library District
24. Franklin Park Public Library District
25. Geneva Public Library District
26. Glen Ellyn Public Library
27. Glenside Public Library District
28. Glenwood-Lynwood Public Library District
29. Grande Prairie Public Library District
30. Green Hills Public Library District
31. Hillside Public Library
32. Hinsdale Public Library
33. Hodgkins Public Library District
34. Homewood Public Library District
35. Indian Prairie Public Library District
36. Itasca Community Library
37. Justice Public Library District
38. Kaneville Public Library District
39. La Grange Park Public Library District

40. LaGrange Public Library
41. Lansing Public Library
42. Linda Sokol Francis Brookfield Library
43. Lyons Public Library
44. Markham Public Library
45. Matteson Area Public Library District
46. McCook Public Library District
47. Melrose Park Public Library
48. Midlothian Public Library
49. Northlake Public Library District
50. Oak Brook Public Library
51. Oak Lawn Public Library
52. Oak Park Public Library
53. Park Forest Public Library
54. Prairie Trails Public Library District
55. Richton Park Public Library District
56. River Forest Public Library
57. River Grove Public Library
58. Roselle Public Library District
59. Saint Charles Public Library District
60. Schiller Park Public Library
61. Steger-South Chicago Heights Public Library District
62. Theosophical Society in America
63. Thomas Ford Memorial Library
64. Thornton Public Library
65. Tinley Park Public Library
66. Town and Country Public Library District
67. University Park Public Library District
68. Villa Park Public Library
69. Warrenville Public Library District
70. West Chicago Public Library District
71. Westchester Public Library
72. Westmont Public Library
73. Wood Dale Public Library District
74. Woodridge Public Library
75. Worth Public Library District

Appendix: Calculating average score

The survey results based on the Likert scale follow a prescribed methodology which is outlined below. This is a method used for “ordinal data” of which Likert scales fall under. This method determines a single answer based on the median, or average, score.

Steps to determine median score.

1. The number of ratings is assigned a number.

Number per Likert scale rating	
Very satisfied	1
Satisfied	2
Neutral	3
Dissatisfied	4
Very dissatisfied	5
No basis for judgement	0

The range for each rating is determined by this formula.

2. Subtract the minimum from the maximum: $5-1=4$
3. Take the result above and divide by the maximum. This will determine the ranges: $4 / 5 = 0.8$

This determines the number range for each rating, starting with 1 is the lowest number in the scale: $1 + 0.8 = 1.80$

Ranges for 5 question Likert scale	
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	

4. Total each question by points and divide by the number of responses. This will determine the average score for the question.

For example, responses to OCLC are scored and the average score is determined. This average score is then compared to the range, which gives us the survey response for OCLC WorldShare is “satisfied” since 1.96 falls within the 1.81 to 2.60 range for the Likert scale.

	Response Counts	OCLC WorldShare score	
Very satisfied	17	17	
Satisfied	40	80	
Neutral	12	36	
Dissatisfied	1	4	
Very dissatisfied	0	0	
No basis for judgement	5	0	
This total response counts does not include “No basis for judgement”	70	137 Divided by 70 = 1.96	This score is the average for the survey rating

Likert median scores: platform satisfaction survey results

Platform	Median Score	Result
WorkFlows	2.43	Satisfied
BLUEcloud Analytics	2.44	Satisfied
MobileStaff	2.98	Neutral
Aspen Discovery	2.19	Satisfied
LiDA	2.54	Satisfied
MessageBee	2.16	Satisfied
OCLC WorldShare	1.96	Satisfied

Ranges for 5 question Likert scale	
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	