# SWAN ADMINISTRATORS' & DIRECTORS' QUARTERLY MEETING

**Meeting Packet**

March 6, 2025

10:00 A.M.

# SWAN Administrators' & Directors' Quarterly Meeting

March 6, 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 September 5, 2024 Quarterly meeting minutes  (pgs. 3-4)

5. Action Item – Approval of the December 5, 2024 Quarterly meeting minutes  (pgs. 5-6)

6. Information Item—Board election for 2025   (p.7)

7. Information Item—Enhanced online patron registration for SWAN libraries  (pgs. 8-16)

8. Action Item – Approval of the fiscal year 2026 budget & membership fees  (pgs. 17-46)

9. Discussion Item—SWAN Board Environmental Task Force report & recommendations (pgs 47-59)

10. Information Item—SWAN 2025 platform survey

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

12. Announcements and Questions

13. Next meeting: June 5, 2025

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

# SWAN Administrators' Quarterly Meeting Minutes

**September 5, 2024**
**10:00 a.m. – 12 p.m.**
**Oak Brook Public Library**
**600 Oak Brook Road Oak Brook, IL 60523**
**Meeting recording: https://www.youtube.com/watch?v=2TxH42y8qZQ**

1. **Call to Order and Welcome**
   President Cottrill called the meeting to order at 10:00 a.m. Bussey, Cottrill, Johnson, Waltman 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 June 6, 2024, Quarterly meeting minutes**
   Waltman (Homewood Public Library) motioned, seconded by Ridgeway Burns (Itasca Public Library). Motion carried by unanimous vote.

5. **Information Item – SWAN Board Environmental Scan Task Force update**
   Skog updated the group on the Scan Task Force.

6. **Information Item – Gale proposal for subscription e-resources**
   Tara Wood gave an overview of the Gale proposal.

7. **Discussion Item – Revision to SWAN networking & working group**
   Brandwein gave an overview of the changes to the advisory groups for 2025. A Q&A ensued.

8. **Discussion Item – Online Patron registration options for SWAN libraries**
   Tara Wood reviewed the online patron registration options. The meeting packet contained a written overview of the options available for SWAN to move forward with as a consortia-wide solution. There was verbal consensus in the room to continue to explore a robust online patron registration solution and include it as part of the planning for the next year's FY26 budget.

9. **Information Item – SWAN Expo 2024 recap**

Skog discussed this year's Expo with number of attendees, presenters, etc. A brief discussion on the possibility of changing the EXPO to a time earlier in the year.

## 10. Announcement and questions

Milavec (Downers Grove Public Library) thanked SWAN for their participation in Cards for Kids.

## 11. Next meeting: December 6, 2024

**Cottrill ended the meeting at 11:13 a.m.**

Minutes Prepared by Ginny Blake

Respectfully Submitted,

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# SWAN Administrators' Quarterly Meeting Minutes

**10:00 a.m. – 12:00 p.m.**
**December 5, 2024**
**https://swanlibraries-net.zoom.us/meeting**

1. **Call to Order and Welcome**
   President Cottrill called the meeting to order at 10:02 a.m. Blazek, Cottrill, Musil, Waltman, Wassenaar were present to establish a board quorum.

2. **Public Comment**
   No public comment.

3. **Introduction of New Library Directors and Visitors**
   Heather-Marie Montilla, Bellwood Public Library

4. **Action Item – Approval of the September 5, 2024, Quarterly meeting minutes**
   Tabled till March 2025 Quarterly meeting

5. **Information Item – SWAN Board Environmental Scan Task Force update**
   Skog updated the group on the Scan Task Force. The Sirsi Dynix contract concludes April 30th. The final recommendations and report will be brought to the SWAN Board & members by the March 2025 Quarterly meeting.

6. **Information Item – Steps SWAN has undertaken to improve our software solutions based on Platform Satisfaction Survey**
   Skog highlighted and reviewed the 6 SWAN software platforms

7. **Information Item – Aspen Discovery community development & new features**
   Wood discussed/reviewed the Aspen Discoveries

8. **Information Item – Next year's SWAN budget & timeline**
   Skog reviewed the FY26 budget and timeline. Skog explained some of the budget changes and savings for FY26.

9. **Information Ite – ILA Public Policy Committee**
   Skog discussed the ILS Public Policy Committee

10. **Announcement and questions**
    None

**11. Next meeting: March 6, 2025**

**Cottrill ended the meeting at 10:58 a.m.**

Minutes Prepared by Ginny Blake

Respectfully Submitted,

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**Date:** **March 6, 2025**
**To:** **SWAN Board**
**From:** **Aaron Skog, Executive Director**
**Re:** **SWAN Board election for 2025**

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This election cycle has three SWAN governing board seats open for the election, with one member Jesse Blazek unable to run after his second term. Below is a timeline for the upcoming election.

| | |
|---|---|
| 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 |

If you are interested in running for the SWAN Board, feel free to reach out to one of the representatives to learn more about the role.

| SWAN Board Member | Library | Email | Term Expires |
|---|---|---|---|
| Dawn Bussey | Glen Ellyn Public Library | dawnbussey@gepl.org | July 1, 2027 |
| Zach Musil | Tinley Park Public Library | zmusil@tplibrary.org | July 1, 2027 |
| Anna Wassenaar | Blue Island Public Library | awassenaar@blueislandlibrary.org | July 1, 2025 |
| Colleen Waltman | Homewood Public Library | colleenw@homewoodlibrary.org | July 1, 2025 |
| Jesse Blazek | Palos Heights Public Library | jblazek@phlibrary.org | July 1, 2025 |
| Samantha Johnson | Roselle Public Library | sjohnson@rosellepld.org | July 1, 2026 |
| Jennifer Cottrill | Midlothian Public Library | jcottrill@midlothianlibrary.org | July 1, 2026 |

# SWAN Online Patron Registration Research

SWAN Quarterly meeting, September 5, 2024

## Introduction

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

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

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

## Feature summary and definitions

### Registration forms

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

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

## Welcome emails

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

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

## Address verification

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

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

## Identity verification

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

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

## Duplicate checking

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

## Provisional cards

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

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

## Non-resident registration

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

## Card renewal

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

## Minor registration

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

# Feature comparison

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

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

# Costs

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

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

## Identity verification costs

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

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

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

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

## Card renewal costs

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

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

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

# Privacy, security, and accessibility

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

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

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

# Conclusion

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

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

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

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

# Appendix

Public libraries currently using the SWAN online patron registration tool:

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

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

Libraries using another online patron registration tool:

1. Geneva Public Library District (Jotform, mail)
2. Hinsdale Public Library (Webform, mail)
3. Indian Prairie Public Library (Patron Point)
4. La Grange Park Public Library District (Google Forms, email)
5. Midlothian Public Library (Jotform)
6. St. Char877les Public Library (Microsoft Forms, mail)
7. Steger-South Chicago Heights Public Library (Google Forms, in person pickup)

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

Libraries with no online registration:

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

# SWAN Budget
# Fiscal Year 2026

## July 1, 2025 – June 30, 2026

# SWAN Budget Information & Guidelines
### Fiscal Year 2026 (July 1, 2025 – June 30, 2026)

## Introduction

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

## Budget Highlights

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

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

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

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

# Revenue
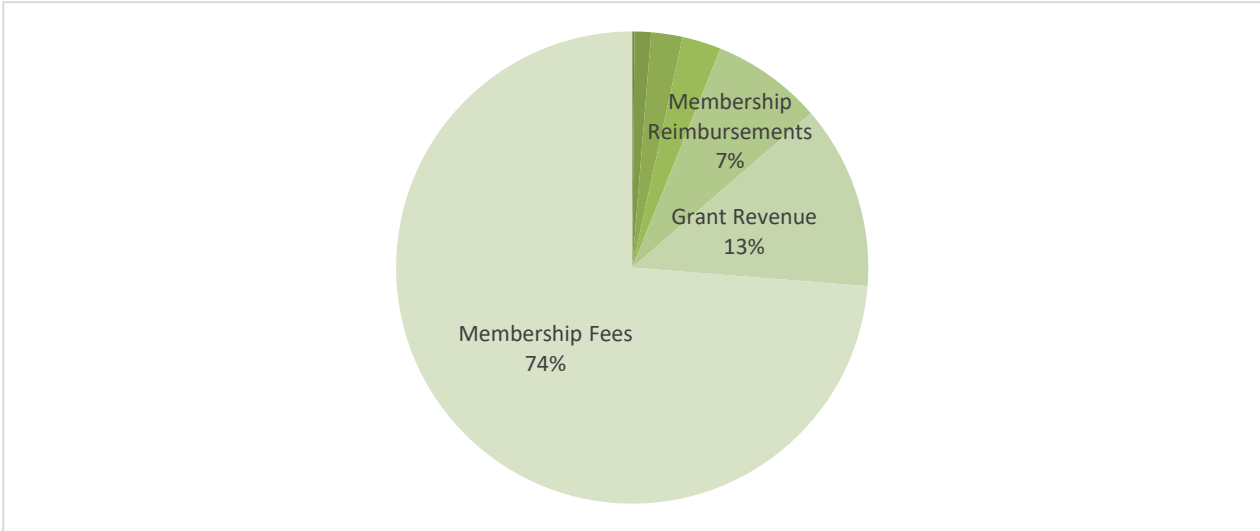


## Membership Fees

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

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

**4011**          **SWAN Internet Access Membership Fees**                         **$3,700**

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

## Membership Reimbursements

**4110**          **Member One-Time Project Receipts**                             **$0**

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

**4190**          **Member Group Purchase Receipts**                               **$301,600**

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

## Reimbursements

**4220**          **Reimbursement Losses for Resource Sharing**                          **$42,000**

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

**4230**          **Collection Agency Fees**                          **$0**

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

**4240**          **E-commerce transactions**                          **$43,400**

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

**4250**          **Deaccession transactions**                          **$0**

Revenue collected from deaccession of SWAN equipment or furniture.

## Grant Revenue

**4310**          **RAILS Support to SWAN**                          **$501,394**

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

**4320**          **Other Grant Revenue**                          **$0**

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

## Registration & Event Receipts

**4499**          **Annual Conference Receipts**                          **$6,260**

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

## Investment & Interest

**4510**          **Interest Income**                          **$85,000**

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

**4520         Investment Income                                                            $21,000**
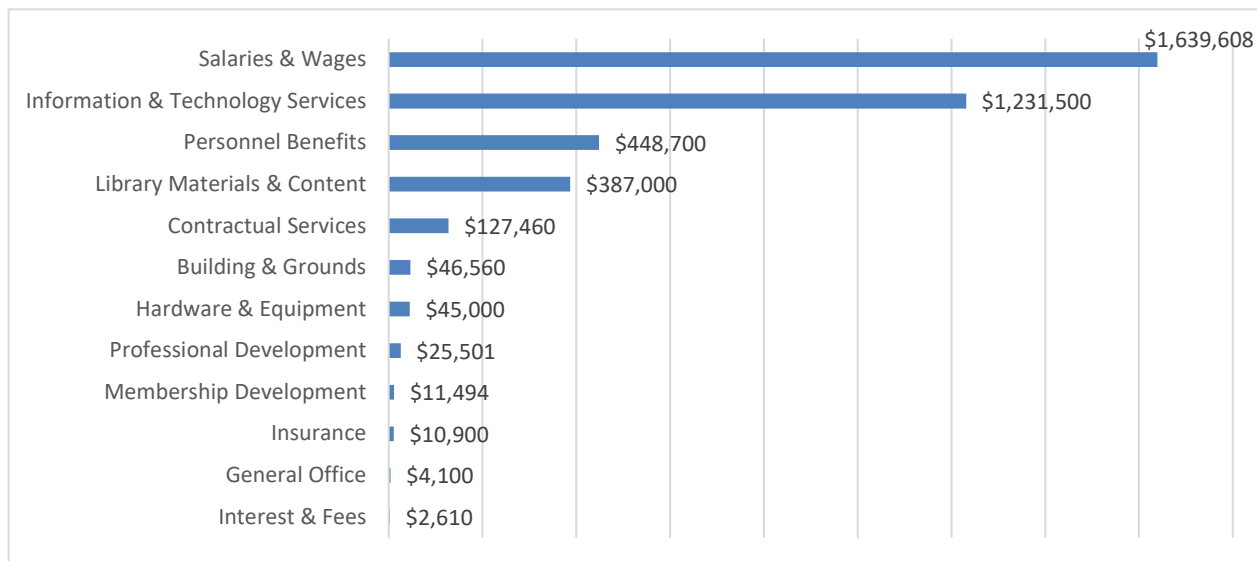
SWAN currently is a member of IMET. The annual income is recorded in this budget revenue line.

## Reserves Funding

**4600         Reserves Funding                                                             $45,000**

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

## Expenses



Chart: Expenses
- Salaries & Wages: $1,639,608
- Information & Technology Services: $1,231,500
- Personnel Benefits: $448,700
- Library Materials & Content: $387,000
- Contractual Services: $127,460
- Building & Grounds: $46,560
- Hardware & Equipment: $45,000
- Professional Development: $25,501
- Membership Development: $11,494
- Insurance: $10,900
- General Office: $4,100
- Interest & Fees: $2,610

## Salaries & Wages

**5000         Salaries & Wages                                                         $1,639,608**

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

## Personnel Benefits

**5021         Social Security Taxes                                                     $125,600**

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

**5022         State Unemployment Insurance                                                    $0**

Organization pays unemployment directly should it be required.

**5023**         **Worker's Compensation**                                            **$4,700**

Organization insurance provided by insurance vendor.


**5024**         **Retirement Benefits**                                             **$138,300**

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


**5025**         **Health, Dental, Life And Disability Insurance**                   **$178,600**

Employee health insurance is provided by LIMRiCC Purchase of Health Insurance Program (PHIP). This budget reflects a reduction due to changes with employee benefit selections.


**5026**         **Tuition Reimbursements**                                           **$1,100**

Tuition reimbursement benefit for employees.


**5085**         **Staff Wellness**                                                    **$400**

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


## Building & Grounds

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


**5110**         **Rent/Lease**                                                      **$41,800**

SWAN signed a 7-year lease in 2024 for office space. This budget reflects 2 months of the rent abatement per the lease, and 10 months expense based on a smaller commercial space.


**5120**         **Utilities**                                                        **$3,800**

Facility electricity and natural gas expenses are recorded in this line. Anticipated to be lower in FY26 based on square foot reduction of office space.


**5130**         **Property Insurance**                                                 **$0**

Property and flood insurance covers office space furniture and equipment.


**5140**         **Repairs & Maintenance**                                             **$960**

Used for facility repairs including door fob security maintenance and repairs.


**5150**         **Custodial Service & Supplies**                                       **$0**

Cleaning service is provided as part of the office lease.

**5190          Other Building Maintenance                                    $0**

Used for alarms and security cameras related to facility expense.


## Professional Development

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


**5210          Conference Travel                                          $10,000**

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


**5220          Staff Meetings                                             $901**

Expenses related to SWAN staff meetings, mostly food and a holiday luncheon, are recorded in this line.


**5230          Staff Professional Development                             $8,800**

SWAN employees participate in presentations at ILA, ALA, COSUGI and other professional organization events. Attending the annual COSUGI conference is a must for SWAN staff as it allows the organization to plan for upcoming library software features and functions.


**5240          Professional Association Membership Dues                   $2,500**

SWAN employees participate in ALA, ILA, and COSUGI activities, often presenting at conferences. Individual

**5250          Educational Material                                       $800**

This budget reduces some of the online learning expenses for employees.


**5260          Online Learning                                           $2,500**

SWAN employee training and courses on best security practice, identifying and preventing phishing attempts, and training as required by law.


## Membership Development

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


**5310          Travel Reimbursement                                       $900**

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

**5320          Membership Meetings                                                  $0**

Refreshments for the 50+ membership advisory and user group meetings held annually, such as coffee and donuts, or other activity supplies. Reduced to zero for the budget post-pandemic.

**5330          Library Professional Development                                $8,094**

Subscription expenses for learning management system and online tutorial coursework. Library staff have the ability to complete interactive training and within the learning management system, complete courses to master skills in the software systems SWAN provides. Expenses include Articulate Storyline, and Inquisiq, which are components of SWAN's Learning Management System.

**5350          Marketing & Promotional Material                                  $0**

Expenses related to printing library promotional material such as bookmarks or brochures.

**5399          Annual Conference                                            $2,500**

SWAN's annual conference, called SWAN Expo, supports speaker fees, honorarium, and travel expense for speakers. Costs associated with the facility and event are noted with the budget lines ending in "99" within this budget chart of accounts.

## Information & Technology Services

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

**5420          Application Software Licensing                            $20,300**

Expenses related to SWAN's support software application include employee tools to create videos, deploy client software, design presentations, run meetings, and create instructional material. Vendor licensing includes: Formsite (webform software subscription), SurveyMonkey (for ongoing usability Input), MailChimp for e-newsletter, Adobe Acrobat, Adobe Creative Suite, Asana, Articulate Storyline, LastPass, Microsoft Office O365, Microsoft Visio Pro O365, Panda Virus Protection & Patch Management, and MSI Package Installer.

**5430          Server Software Licensing                                $118,800**

Expenses related to SWAN's support infrastructure including SSL Certificates for SWAN, domain subscription, SonicWALL Security licensing and subscription, Microsoft Active Directory, Microsoft Azure, and Microsoft Server licenses. This budget includes shift in expenses for SWAN hosting Aspen in Microsoft Azure as that service is helpdesk system hosting. The server licensing expenses related to SWAN's library services platform to run SirsiDynix Symphony and test systems. The single sign-on service at $27,000 annually was added last year, which will simplify library staff access to SWAN's growing web-based platforms, as well as providing enhanced security through management of users with this identify service provider.

**5440        Library Services Platform        $993,100**

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

**5450        Data Management Services        $37,600**

Expenses related to maintaining bibliographic and user data within the SWAN library services platform. This includes software provided to cataloging libraries to maintain bibliographic standards of the consortium. Vendors expenses include: ALA RDA Toolkit for Cataloging Libraries, WebDewey (OCLC negotiated directly with SWAN), and BackStage Library Works (ongoing authority updates). The National Change of Address (NCOA) is processed annually with Unique Management which updates the patron database address data at $13,000 expense annually. This is the first year using BackStage Library Works for SWAN's authority data processing, as the company MARCIVE closed its operations December 2024.

**5460        Information Subscription Service        $20,400**

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

**5470        Subscription Support Services        $33,800**

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

**5480        Telecommunications        $7,500**

Expenses associated with SWAN facility connection to the internet and phone support were reduced due to the office relocation.

**5490        Group Purchases - Services        $600**

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

## General Office

This category is primarily the expenses associated with running the organization's headquarters at 915 Harger Drive, Suite 260, Oak Brook, Illinois.

**5510**      **Office Supplies**      **$3,300**

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

**5520**      **Postage**      **$800**

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

**5550**      **Furniture**      **$0**

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

**5599**      **Annual Conference Supplies**      **$0**

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

## Hardware & Equipment

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

**5610**      **Equipment Rental/Maintenance**      **$0**

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

**5620**      **Hardware**      **$45,000**

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

**5690**      **Group Purchases - Hardware**      **$0**

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

## Insurance

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

**5700            Insurance                                                    $10,900**

The SWAN organization insurance for directors and officers, cyber crime, and business owner's insurance.


## Contractual Services

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

**5810            Legal                                                         $1,500**

SWAN utilizes legal services with Klein, Thorpe, Jenkins for various activities and inquiries as they arise during the year.

**5820            Accounting                                                  $22,060**

Expenses associated with activities include SWAN annual audit, and the accounting service with Lauterbach & Amen.

**5830            Consulting                                                    $1,300**

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

**5840            Payroll Service Fees                                         $4,600**

Expenses for the payroll service provided through Paylocity.

**5850            Contractual Agreements                                          $0**

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

**5860            Notification & Collection                                    $85,900**

This budget includes the new service for all 100 member libraries to have email and SMS messages enhanced and sent through the MessageBee service provided by Unique Management. All 100 library notifications sent via automated phone calls are also provided through MessageBee. SWAN has also contracted with a Unique Management to print all user notices at $4,092 annually.

**5870            Recruitment                                                     $0**

Costs for personnel search, advertising of an open position at SWAN.

**5899**       **Annual Conference Facility Contract**        **$12,100**

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

## Library Materials & Content

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

**5910**       **Print Materials**        **$0**

This line is intended to supplement printing services for promotional material or print collections supplied to member libraries.

**5920**       **Reimbursement for Resource Sharing**        **$42,000**

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

**5930**       **Group Purchases - Content**        **$0**

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

**5940**       **E-commerce payment transactions**        **$43,400**

Expenses related to the Aspen Discovery online payments through PayPal. Library payments will be collected in the revenue budget line 4240 and quarterly reconciliation and payments back to the libraries are recorded in this budget line.

**5990**       **Group Purchases - Electronic Resources**        **$301,600**

SWAN negotiated group purchase for online subscriptions through RAILS EBSCO Flagship package for 50 member public libraries. The associated revenue offset in the revenue 4190 budget line.

## Interest & Fees

**6010**       **Bank Fees**        **$2,560**

Expenses associated with bank fees for stopping checks or other services are recorded in this line. The banking service for lock box deposits is included in this budget line.

**6020          Merchant Account Fees                                                     $50**

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


**6030          Interest Payment                                                          $0**

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


**6099          Annual Conference Merchant Fees                                          $0**

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


## Asset Management


**6110          Depreciation                                                          $1,460**

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


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


**6130          Vacation Expense                                                         $0**

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

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

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

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

## SWAN Reserves Plan: Updated for FY26 Budget

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

# Explanation of Membership Fees

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

**Academic Libraries**

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

  1) Student Population (IBHE Profile), rounded to nearest 1,000 X 2

  2) Item Count rounded to nearest 1,000 / 3

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

**School Libraries**

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

  1) Student Population (Illinois Report Card), rounded to nearest 1000 X 5

  2) Building Location/Branch Fee $2,500 per building

Data for student population is gathered from the Illinois Report Card.

**Special Libraries**

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

  1) Title Fee (Tier 1 <10,000 $7,500; Tier 2 <40,000 $10,000; Tier 3 > 40,000 $12,500)

  2) Building Location/Branch Fee $2,500 per building

**Public Libraries**

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

 1) Base Fee, based on 50% needed SWAN revenue from public libraries

 2) Public Library Fee, based on Property Tax Income as a percentage of remaining 50% of needed SWAN revenue from public libraries. The amount of annual bond payments in non-operating debt service will be removed from the Property Tax Income amount.

 3) LLSAP Grant Award Discount, based on the total amount of LLSAP funding divided by the count of public libraries in SWAN

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

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

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

**County Property Tax Data**

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

**Cook County Tax Payments**

Source: Cook Country Treasurer

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

Data collected: FOIA request for SWAN public libraries

**DuPage County Tax Payments**

Source: DuPage County Treasurer

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

Data collected: Tax year payments distributed in calendar year

**Kane County Tax Payments**

Source: Kane County Treasurer

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

Data collected:  Final Settlement Sheet Tax Year, Distribution Summary


**Will County Tax Extension**

Source: Will County Clerk

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

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

**Debt Service**

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

[Bond Payment Submission Form](#)

**LLSAP Funding Award**

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

# Chart 1: SWAN Membership Fees
## Fiscal Year 2026: July 1, 2025 - June 30, 2026
### For membership approval

| SWAN Library | Fee | State LLSAP Grant Discount | SWAN Fee Total | Prior Year Fee | Increase/ (Decrease) |
|---|---|---|---|---|---|
| Acorn Public Library District | $ 28,226 | ($5,223) | $ 23,003 | $ 22,441 | $562 |
| Addison Public Library | $ 66,193 | ($5,223) | $ 60,970 | $ 60,589 | $381 |
| Alsip-Merrionette Park Public Library District | $ 43,169 | ($5,223) | $ 37,946 | $ 37,844 | $102 |
| Batavia Public Library District | $ 58,277 | ($5,223) | $ 53,054 | $ 51,741 | $1,313 |
| Bedford Park Public Library District | $ 32,240 | ($5,223) | $ 27,017 | $ 25,371 | $1,646 |
| Beecher Community Library District | $ 20,470 | ($5,223) | $ 15,248 | $ 14,954 | $293 |
| Bellwood Public Library | $ 35,733 | ($5,223) | $ 30,510 | $ 27,239 | $3,271 |
| Bensenville Community Public Library District | $ 32,520 | ($5,223) | $ 27,298 | $ 26,631 | $667 |
| Bensenville Elementary School District #2 | $ 17,500 | | $ 17,500 | $ 17,500 | $0 |
| Berkeley Public Library | $ 21,493 | ($5,223) | $ 16,270 | $ 15,984 | $287 |
| Berwyn Public Library | $ 53,149 | ($5,223) | $ 47,926 | $ 41,874 | $6,052 |
| Bloomingdale Public Library | $ 43,361 | ($5,223) | $ 38,138 | $ 38,033 | $105 |
| Blue Island Public Library | $ 29,145 | ($5,223) | $ 23,923 | $ 23,104 | $819 |
| Bridgeview Public Library | $ 26,879 | ($5,223) | $ 21,656 | $ 21,754 | ($98) |
| Broadview Public Library District | $ 26,615 | ($5,223) | $ 21,392 | $ 22,993 | ($1,600) |
| Calumet City Public Library | $ 30,371 | ($5,223) | $ 25,148 | $ 25,715 | ($567) |
| Calumet Park Public Library | $ 19,187 | ($5,223) | $ 13,964 | $ 13,665 | $299 |
| Carol Stream Public Library | $ 47,545 | ($5,223) | $ 42,322 | $ 42,419 | ($97) |
| Chicago Heights Public Library | $ 24,424 | ($5,223) | $ 19,202 | $ 19,178 | $24 |
| Chicago Ridge Public Library | $ 29,876 | ($5,223) | $ 24,653 | $ 24,288 | $365 |
| Cicero Public Library | $ 33,102 | ($5,223) | $ 27,879 | $ 28,344 | ($465) |
| Clarendon Hills Public Library | $ 24,579 | ($5,223) | $ 19,356 | $ 19,150 | $206 |
| Crestwood Public Library District | $ 23,333 | ($5,223) | $ 18,110 | $ 17,422 | $688 |
| Crete Public Library District | $ 34,028 | ($5,223) | $ 28,805 | $ 28,205 | $600 |
| Dolton Public Library District | $ 25,709 | ($5,223) | $ 20,486 | $ 20,537 | ($51) |
| Downers Grove Public Library | $ 67,107 | ($5,223) | $ 61,884 | $ 62,929 | ($1,045) |
| Eisenhower Public Library District | $ 53,521 | ($5,223) | $ 48,298 | $ 47,153 | $1,145 |
| Elmwood Park Public Library | $ 32,196 | ($5,223) | $ 26,973 | $ 26,785 | $188 |
| Evergreen Park Public Library | $ 29,102 | ($5,223) | $ 23,880 | $ 23,468 | $411 |
| Flossmoor Public Library | $ 29,369 | ($5,223) | $ 24,146 | $ 24,547 | ($401) |
| Forest Park Public Library | $ 35,151 | ($5,223) | $ 29,928 | $ 29,414 | $513 |
| Frankfort Public Library District | $ 41,284 | ($5,223) | $ 36,061 | $ 34,855 | $1,207 |
| Franklin Park Public Library District | $ 34,548 | ($5,223) | $ 29,325 | $ 27,868 | $1,457 |
| Geneva Public Library District | $ 64,615 | ($5,223) | $ 59,392 | $ 58,613 | $779 |
| Glen Ellyn Public Library | $ 58,851 | ($5,223) | $ 53,629 | $ 52,890 | $738 |
| Glenside Public Library District | $ 46,657 | ($5,223) | $ 41,434 | $ 41,370 | $64 |
| Glenwood-Lynwood Public Library District | $ 30,427 | ($5,223) | $ 25,204 | $ 25,458 | ($253) |
| Grande Prairie Public Library District | $ 30,889 | ($5,223) | $ 25,666 | $ 25,356 | $310 |
| Green Hills Public Library District | $ 40,121 | ($5,223) | $ 34,898 | $ 34,145 | $753 |
| Harvey Public Library District | $ 26,274 | ($5,223) | $ 21,051 | $ 20,613 | $439 |
| Hillside Public Library | $ 30,389 | ($5,223) | $ 25,166 | $ 24,722 | $444 |
| Hinsdale Public Library | $ 44,611 | ($5,223) | $ 39,388 | $ 38,940 | $448 |
| Hodgkins Public Library District | $ 23,389 | ($5,223) | $ 18,166 | $ 18,009 | $156 |
| Homewood Public Library District | $ 38,937 | ($5,223) | $ 33,714 | $ 33,325 | $390 |
| Indian Prairie Public Library District | $ 52,201 | ($5,223) | $ 46,979 | $ 45,789 | $1,190 |
| Itasca Community Library | $ 32,083 | ($5,223) | $ 26,860 | $ 26,554 | $306 |
| Justice Public Library District | $ 20,645 | ($5,223) | $ 15,422 | $ 13,414 | $2,008 |
| Kaneville Public Library District | $ 18,401 | ($5,223) | $ 13,179 | $ 12,851 | $327 |
| La Grange Public Library | $ 41,350 | ($5,223) | $ 36,127 | $ 35,178 | $950 |
| LaGrange Park Public Library District | $ 33,937 | ($5,223) | $ 28,714 | $ 28,014 | $700 |
| Lansing Public Library | $ 42,250 | ($5,223) | $ 37,027 | $ 36,684 | $343 |
| Linda Sokol Francis Brookfield Library | $ 39,026 | ($5,223) | $ 33,803 | $ 33,153 | $650 |
| Lyons Public Library | $ 23,983 | ($5,223) | $ 18,761 | $ 18,445 | $316 |
| Markham Public Library | $ 23,283 | ($5,223) | $ 18,060 | $ 17,982 | $78 |
| Matteson Area Public Library District | $ 41,742 | ($5,223) | $ 36,519 | $ 35,767 | $752 |
| Maywood Public Library District | $ 29,758 | ($5,223) | $ 24,535 | $ 24,197 | $338 |

# Chart 1: SWAN Membership Fees
## Fiscal Year 2026: July 1, 2025 - June 30, 2026
## For membership approval

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

# Chart 2: Public Library County Tax Payments

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

# Chart 2: Public Library County Tax Payments

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

# Chart 2: Public Library County Tax Payments

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

# Chart 3: Public Library Bond Amounts Reported

| Public Library | Bond Amt for FY26 Fee Formula (2022) | Annual Debt Service 2023 | Annual Debt Service 2024 | Annual Debt Service 2025 | Annual Debt Service 2026 | Annual Debt Service 2027 | Annual Debt Service 2028 |
|---|---|---|---|---|---|---|---|
| Acorn Public Library District | $ 30,278 | $ 30,398.00 | $ 30,478.00 | $ 29,518.00 | $ 29,558.00 | $ 29,483.00 | $ 29,365.00 |
| Addison Public Library | | | | | | | |
| Alsip-Merrionette Park Public Library District | | | | | | | |
| Batavia Public Library District | | | | | | | |
| Bedford Park Public Library District | | | | | | | |
| Beecher Community Library District | | | | | | | |
| Bellwood Public Library | | | | | | | |
| Bensenville Community Public Library District | | | | | | | |
| Berkeley Public Library | | | | | | | |
| Berwyn Public Library | | | | | | | |
| Bloomingdale Public Library | | | | | | | |
| Blue Island Public Library | | | | | | | |
| Bridgeview Public Library | $ 253,650 | $ 255,250.00 | $ 258,650.00 | $ 256,750.00 | $ 254,700.00 | $ 257,500.00 | |
| Broadview Public Library District | $ 267,455 | $ 267,872.50 | $ 268,172.50 | $ 272,842.50 | $ 272,252.50 | $ 270,652.50 | $ 268,902.50 |
| Brookfield Public Library | | | | | | | |
| Calumet City Public Library | | | | | | | |
| Calumet Park Public Library | | | | | | | |
| Carol Stream Public Library | $ 234,461 | $ 234,461.00 | $ 234,461.00 | $ 234,461.00 | $ 234,461.00 | $ 234,461.00 | |
| Chicago Heights Public Library | | | | | | | |
| Chicago Ridge Public Library | | | | | | | |
| Cicero Public Library | | | | | | | |
| Clarendon Hills Public Library | | | | | | | |
| Crestwood Public Library District | | | | | | | |
| Crete Public Library District | | | | | | | |
| Dolton Public Library District | | | | | | | |
| Downers Grove Public Library | | | | | | | |
| Eisenhower Public Library District | $ 670,671 | $ 672,103.00 | $ 693,519.00 | $ 669,144.00 | $ 667,968.00 | $ 671,616.00 | |
| Elmwood Park Public Library | | | | | | | |
| Evergreen Park Public Library | | | | | | | |
| Flossmoor Public Library | | | | | | | |
| Forest Park Public Library | | | | | | | |
| Frankfort Public Library District | | | | $ 161,584.26 | $ 188,564.25 | $ 182,742.22 | $ 176,920.19 |
| Franklin Park Public Library District | | | | | | | |
| Geneva Public Library District | $ 1,576,546 | $ 1,580,946.26 | $ 1,588,471.26 | $ 1,598,821.26 | $ 1,599,921.26 | $ 1,606,646.26 | $ 1,610,821.26 |
| Glen Ellyn Public Library | | | | | | | |
| Glenside Public Library District | $ 372,115 | $ 365,565.02 | $ 368,595.02 | $ 365,987.52 | $ 362,918.77 | $ 374,015.63 | $ 359,140.63 |
| Glenwood-Lynwood Public Library District | $ 450,613 | $ 455,375.00 | $ 453,825.00 | $ 455,225.00 | $ 451,025.00 | $ 456,425.00 | $ 451,025.00 |
| Grande Prairie Public Library District | | | | | | | |
| Green Hills Public Library District | $ 390,000 | $ 405,000.00 | $ 150,000.00 | | | | |
| Harvey Public Library District | | | | | | | |
| Hillside Public Library | | | | | | | |
| Hinsdale Public Library | $ 252,912 | $ 268,512.00 | $ 268,712.00 | $ 283,812.00 | $ 293,114.00 | $ 296,816.00 | |
| Hodgkins Public Library District | | | | | | | |
| Homewood Public Library District | | | | | | | |
| Indian Prairie Public Library District | | | | | | | |
| Itasca Community Library | | | | | | | |
| Justice Public Library District | | | | | | | |
| Kaneville Public Library District | | | | | | | |

# Chart 3: Public Library Bond Amounts Reported

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

## Chart 3: Public Library Bond Amounts Reported

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

# Chart 4: Academic, School, Special Library Fees

## Academic Libraries

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

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

## School Libraries

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

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

## Special Libraries

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

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

# SWAN Board Environmental Scan Task Force Report

## Introduction

The SWAN Board took the step of obtaining member library feedback on the SWAN software platform, which was completed in April 2024. The second step within the process was to conduct an environmental scan of the offerings of the library software marketplace.

Based on the membership feedback, the areas to focus on within our scan were the ILS and analytics platforms, both of which are under contract with SirsiDynix. The primary goal of the scan is to inform the SWAN Board on how long to renew the SirsiDynix contact, and secondly, to determine if other options existed that would noticeably improve the satisfaction of member libraries with the functions of the interfaces with the ILS and analytics.

## Library survey

The survey was sent out to library systems and library consortia that notably had made changes to either their ILS or discovery platform or were in the process of selecting a new ILS or OPAC. The selection was based on news announcements and the annual library technology report published in Library Journal. Seeing that SWAN recently replaced its OPAC with Aspen, we wanted to see about matching with libraries that were using Aspen Discovery, but considering other ILS, much like SWAN might do in the future.

| Name of your organization | Name of your current integrated library system (ILS), or library management system (LMS) & support provider. | Name of your current discovery platform (or OPAC) & support provider. | OPAC (What is your level of satisfaction with your current system?) | ILS (What is your level of satisfaction with your current system?) | How long have you used your current ILS/LMS? | How long have you used your current discovery platform/OPAC? |
|---|---|---|---|---|---|---|
| Cuyahoga County Public Library | Koha (ILS) hosted by ByWater Solutions | Aspen Discovery hosted by ByWater Solutions | Very satisfied | Very satisfied | 1 year | |
| CCS | Polaris (Innovative) | PowerPAC (Innovative) | Satisfied | Satisfied | Over 6 years | Over 6 years |
| Wyoming State Library | SirsiDynix Symphony | Aspen Discovery hosted by Bywater Solutions | Satisfied | Satisfied | Over 6 years | 2 years |
| SEO Library Consortium | SirsiDynix Symphony | SirsiDynix Enterprise | Neutral | Neutral | Over 6 years | Over 6 years |
| Illinois Heartland Library System/SHARE | Polaris, Clarivate | Aspen, Bywater Solutions | Satisfied | Dissatisfied | Over 6 years | 1 year |
| Pinnacle Library Cooperative | Polaris ILS, Innovative Interfaces | Polaris PowerPAC, Innovative Interfaces | Neutral | Very satisfied | Over 6 years | Over 6 years |
| PrairieCat | Innovative Interfaces Sierra | Innovative Interfaces Vega | Satisfied | Satisfied | Over 6 years | 1 year |
| CLEVNET | SirsiDynix | Bywater Solutions, Aspen | Very satisfied | Satisfied | Over 6 years | 1 year |

We received 8 responses total to the survey. Of these we interviewed four sytems/consortia.

# Interviews

Based on the survey responses, we selected three library consortia using Polaris ILS to interview and two library consortia/systems using Koha to interview. Our focus was on the interfaces used by library staff for day-to-day transactions and the reporting tool. Web-based interfaces were favored for ease of deployment, i.e., no client install, no VPN requirement, and for ease of use for primary users of the platform.

## Polaris

Based on the Task Force survey feedback, our interview questions were designed to obtain information about III/Polaris data analytics, library staff interfaces, and satisfaction with vendor support.

The Polaris interfaces discussed were the following.

**Leap**

Leap is the name of the web-based interface that has been created for library staff to interact with the Polaris ILS.

**Polaris staff client**

The older Polaris Staff client is still in use by library staff and is required for Polaris administration at the consortia level.

**SimplyReports**

Simply Reports is a web-based interface that stands alongside the Leap interface, much in the same way that SWAN has WorkFlows, BLUEcloud Staff, and Analytics.
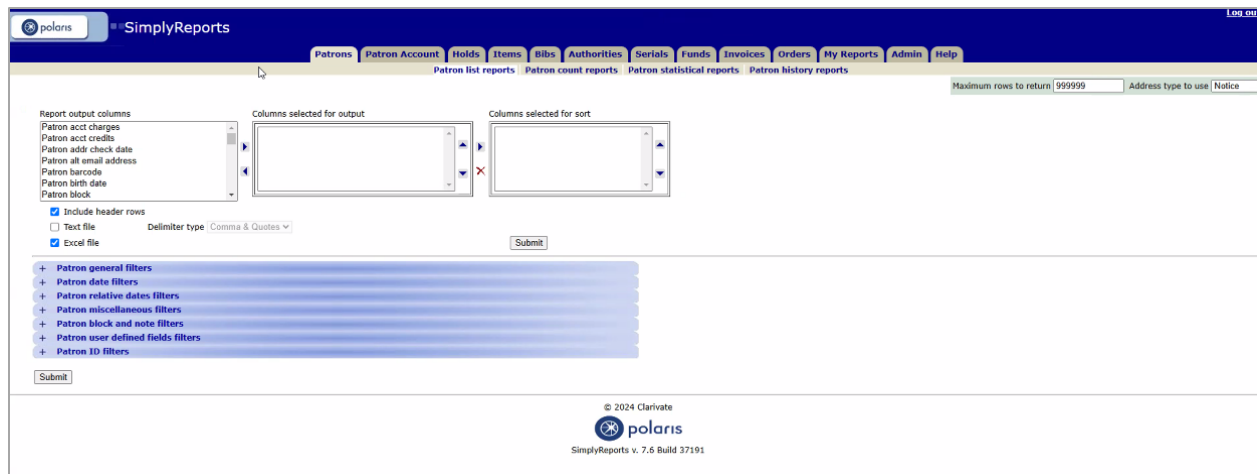
*Figure 1: Polaris SimplyReports web interface*

## Pinnacle Library Cooperative interview

Pinnacle is six public libraries bordering on SWAN and includes Joliet Public Library and Fountaindale Public Library.

### Leap for Pinnacle

The transition from the old Polaris staff client to Leap has been mostly complete by public services staff due to the more visually appealing and easier interface.

### SimplyReports for Pinnacle

The report interface was demonstrated which allows staff to retrieve data by pointing and clicking on options. It requires no knowledge of SQL programming. Each staff member has their own login for access to the tool.

### Analytics via Microsoft

Pinnacle staff Matt Hammermeister shared additional tools from Microsoft called Report Server that could be explored for data analytics, since the Polaris ILS utilizes a Microsoft SQL database. Other consortia interviewed after about Microsoft Report Server were unaware of the option.

## Computer Cooperative System: CCS interview

CCS is an Illinois library consortium of 29 public libraries which includes Evanston, Algonquin, Northbrook Public Library among others.

### Leap for CCS

Leap was the circulation interface of choice for CCS libraries during its go-live of 2018. Other library staff in cataloging roles prefer the Polaris Staff client, as the Leap interface is still undergoing development in the role of bibliographic record management.

**SimplyReports for CCS**

Reporting tools for CCS include SimplyReports, but the consortium favors a homegrown reporting platform it designed. This custom platform uses SQL queries with the Polaris ILS database. The consortium has a staff person trained to build queries using the Microsoft Structured Query Language (SQL) which are invoked by custom webpages created by CCS, e.g., circulation statistics, ILL statistics, etc.

**Adding libraries in Polaris for CCS**

The consortium has recently added Mt Prospect Public Library District and Waukegan Public Library. The process of loading data from the migration of those two libraries required all libraries in the consortium to run in offline mode for the duration of the data load, which took three full days to complete (September 28 – September 30, 2024). Duplication of bibliographic data occurred during the data load, so data cleanup and processing took place after the go-live of the two public libraries in CCS.

**Polaris support for CCS**

The consortium utilizes a dedicated support person for most issues who has the power to escalate to other Innovative Interface support team members.

**CCS membership satisfaction survey results**

CCS has recently completed a survey to determine membership satisfaction with their selected Polaris ILS and has issued recommendations on its contract renewal with Innovative Interface.

CCS is using the Polaris PowerPAC as its OPAC and is actively assessing a replacement of the OPAC. The CCS consortium recommends pursuing a renewal of the Polaris contract.

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*Survey results show good satisfaction with the Polaris staff interfaces, particularly Leap and the staff client. When compared with other in-market ILS options, the vast majority of staff find Polaris to be either equal to or better than those tools. Based on these results, CCS will pursue a renewal of our Polaris contract.*

*Lower satisfaction with Simply Reports and PowerPAC indicate the need to explore improvements within those tools or investigate alternate solutions.*

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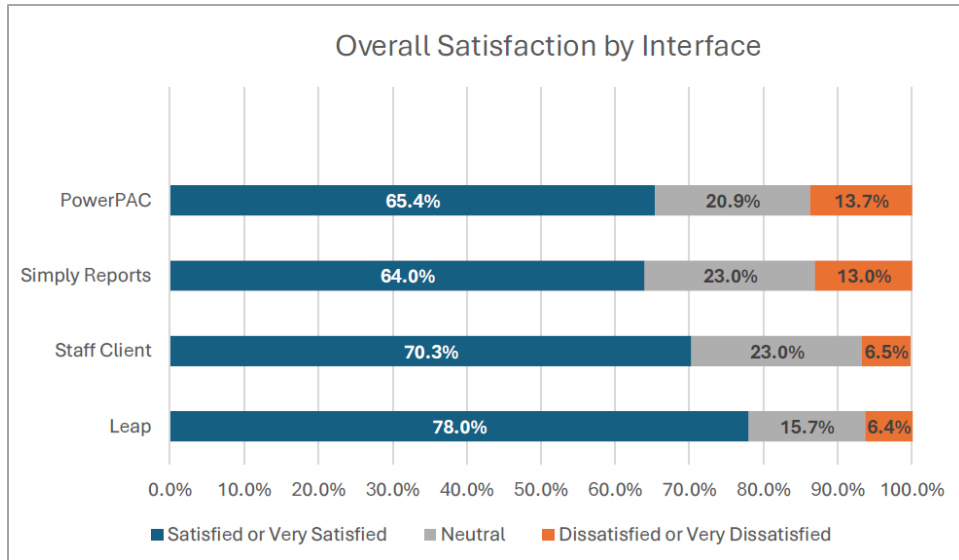
*Figure 2: CCS membership satisfaction survey results by interface*

For comparison, the SWAN membership satisfaction survey completed in 2024 indicated 92% satisfied or somewhat satisfied with WorkFlows, and 8% dissatisfied.
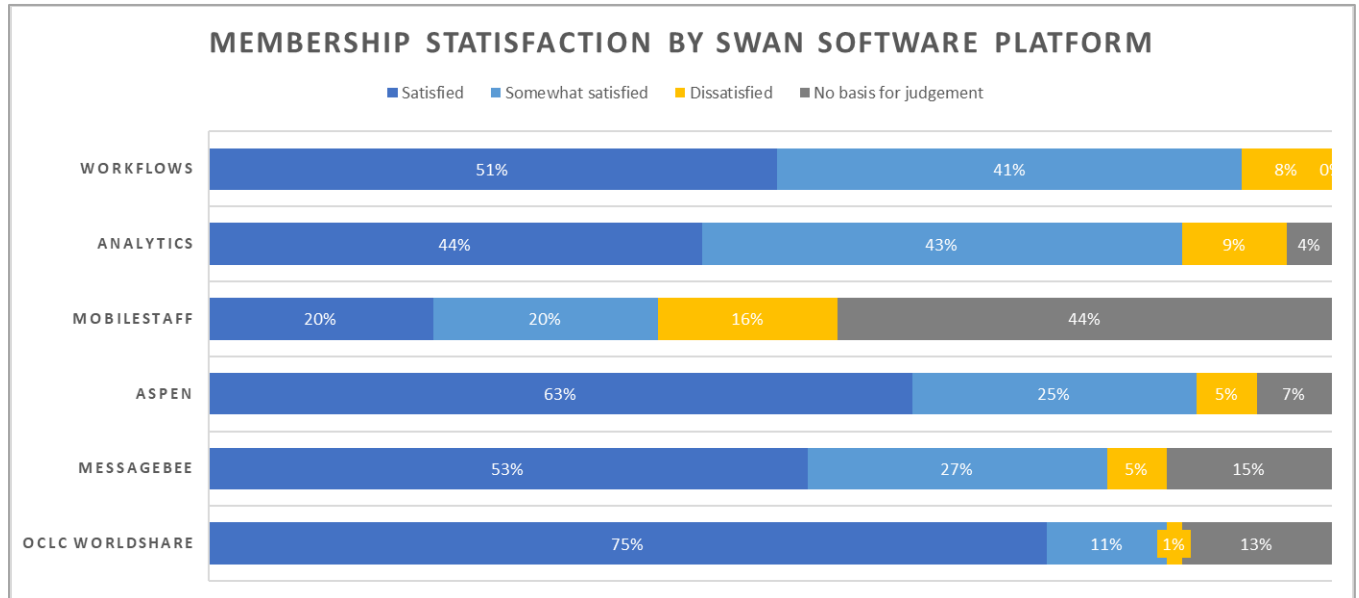


*Figure 3: SWAN 2024 satisfaction survey results by platform overall*

## SHARE interview

SHARE is based in southern Illinois, is part of the Illinois Heartland Library System, and is the largest library consortium running Polaris in the world with 330 libraries and 608 locations. The consortium recently moved away from its Polaris PowerPAC solution for an OPAC in favor of Aspen Discovery.

The survey response from SHARE about Polaris indicated they were "dissatisfied" with the ILS. The consortium has been running on the Polaris ILS for 12 years since its inception in 2012.

### Polaris staff client for SHARE

The Polaris staff client was praised for its power and flexibility, but SHARE noted it could be overwhelming for those unfamiliar with it.

### Leap for SHARE

SHARE library adoption of the Leap interface from the original Polaris staff client has been slow. There are areas of frustration within Leap, such as its search function, which only works well for certain fields and requires users to know what they're searching for. Leap was described as more intuitive for day-to-day tasks, while the Polaris staff client is powerful for more advanced tasks.

### SimplyReports for SHARE

Simply Reports can be powerful once staff are trained on using it effectively. There are some areas of data analysis within Simply Reports which require additional calculations outside of the delivered report.

## Koha ILS & Analytics

Our investigation led us to two groups using the Koha ILS. Koha is an open-source ILS that is the most widely used ILS worldwide. Its origin is from having started as free library software created in New Zealand in 2009, and its name means "gift" in Mauri language. Koha was created for libraries and freely gifted to use and improve upon.

The Koha interface has been web-based since its inception, so all functions for staff and system administration can be found within a single interface (access defined by roles of course).

The interview questions with libraries using Koha were more general about the library staff interface, but included questions about acquisitions, cataloging, as well as reports/analytics.
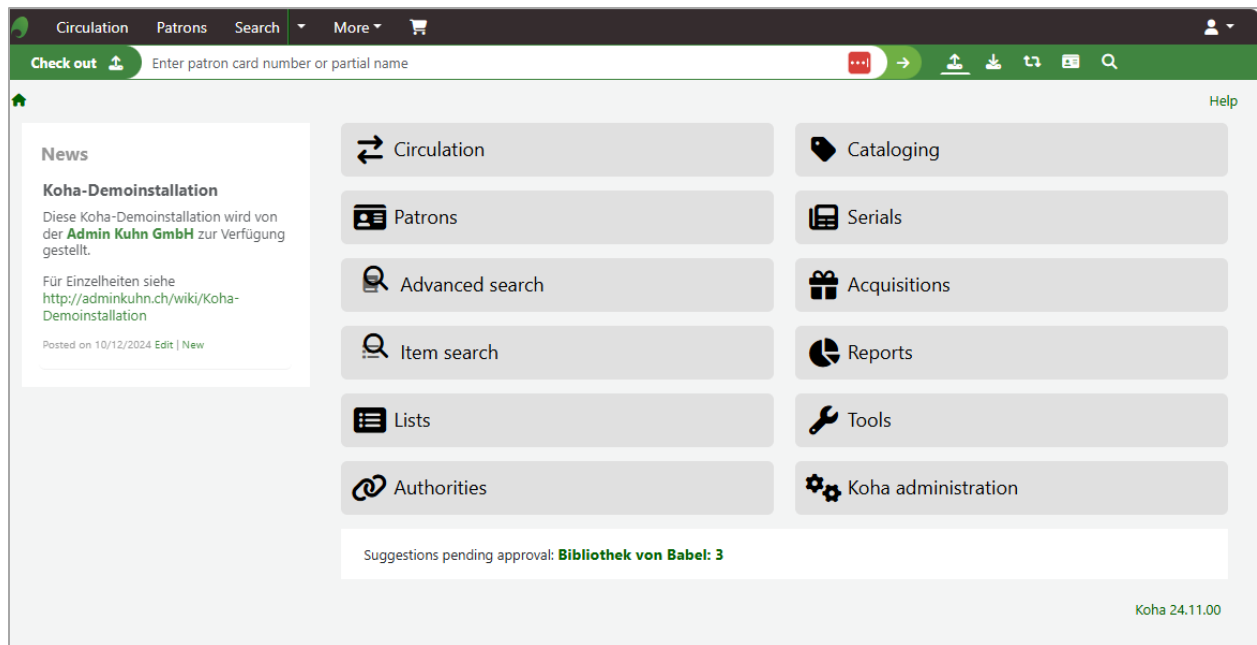
*Figure 4: Koha web-based staff interface upon logging in, with various modules listed*

## Cuyahoga County Library Public Library interview

The Cuyahoga County Public Library is based in northern Ohio and has 27 branches. The total circulation for Cuyahoga in 2022 was 10.7 million, which for SWAN in that same year was 18.4 million. The library was using the Sierra ILS prior to switching to Koha in 2023 after a thorough RFP process.

### Staff interface for Cuyahoga

The library was very positive about the Koha staff interface. The collective desire to change from the traditional vendors towards a solution that was "new and under constant revision" was expressed during the interview. Major features and improvements were long delayed or nonexistent within the previously used Sierra ILS.

### Holds & requests for Cuyahoga

The Cuyahoga system led a process with its multiple branches to improve and optimized the holds matrix within Koha. The complexity of designing a new version of the matrix was embraced by the library staff in advance of the migration, which led to consolidation and simplification within the Koha implementation.

### Acquisitions for Cuyahoga

The area of acquisitions was not explored in depth, being a single agency site.

### Reports & analytics for Cuyahoga

Cuyahoga meticulously planned its migration from Sierra, and the number of reports required to be designed by ByWater Solutions was defined in advance. The majority of reports library staff utilize are within the Koha database. Cuyahoga does take advantage of an additional reporting tool called Metabase, which is a real-time reporting tool that queries the Koha SQL database.
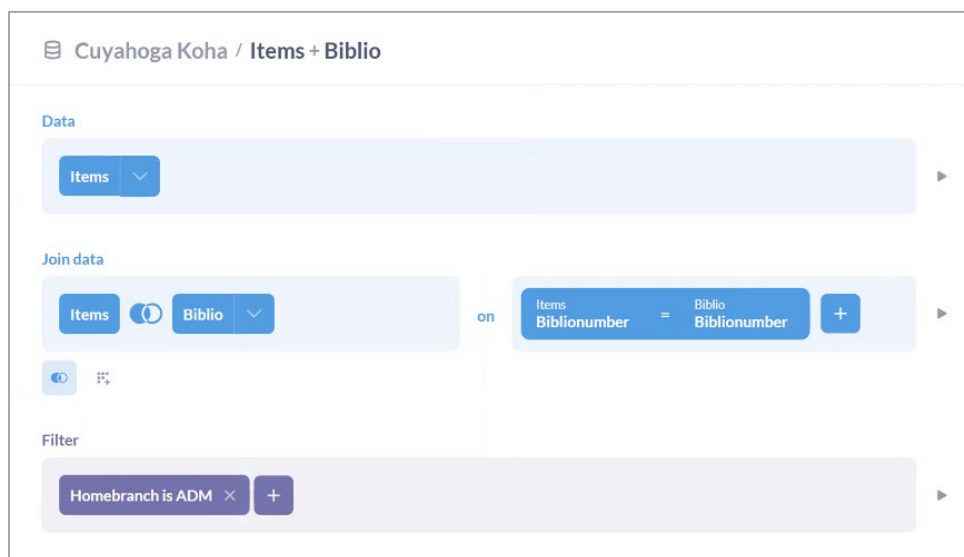


*Figure 5: Koha & Metabase used by Cuyahoga*

**Vendor ByWater Solutions for Cuyahoga**

The staff interviewed held a regard of ByWater Solutions staff that helped with the migration project and the data processing. The library contract with ByWater specified software development be completed for a bookings module, which was completed and then released to the wider Koha community.

ByWater provides hosting for the library and holds a monthly meeting with the library to discuss support and reported issues, as well as opportunities for software development.

## Yavapai Library Network interview

Yavapai Library Network is based in Arizona and in 2024 migrated from Symphony ILS to Koha. The consortium had already selected Aspen Discovery and completed an RFP for a new ILS platform. The consortium serves 51 libraries and had a total circulation of 2 million in 2019.

The consortium selection process utilized an online tool for collecting responses, which may have resulted in a limited number of vendors. Innovative Interfaces did not respond to the RFP, whereas SirsiDynix and ByWater did respond.

**Staff interface for Yavapai**

The Koha interface is widely appreciated by Yavapai libraries. Interestingly, some of the turnover of library staff and leadership as less appreciative of the "newness" of the interface and of its need to further develop features for later release.

### Holds & requests for Yavapai

Yavapai presented the holds administration within Koha and noted the complexity of its relationship of its schools, public libraries, and special libraries. There were some functions utilized by public libraries for lobby display of collections, as well as restricting of collections to new materials.

### Acquisitions for Yavapai

Yavapai utilizes a blend of centralized book ordering by the consortia staff and individual library ordering. The central administrator of the acquisitions process at Yavapai had high regard for the Koha acquisition process.

### Reports & analytics for Yavapai

Yavapai demonstrated that the reporting interface within Koha was sophisticated enough that they did not consider the additional reporting tool Metabase (used by Cuyahoga). The querying language of reports is SQL, and once SQL is understood, the reports can be nuanced quite effectively.

### Vendor ByWater Solutions for Yavapai

The migration timeline for Yavapai was a compact six months and resulted in some issues where library defined reports were not ready for go-live. This was more of a result of the project timeline than a deficiency of the vendor ByWater Solutions.

Overall, Yavapai was more circumspect during the interview about the areas of Koha functionality, and noted some areas of Koha configuration that require additional development for consortia functions.

# Software demonstrations

The software demonstrations were completed with the vendors ByWater Solutions, Innovative Interfaces, and SirsiDynix. These demonstrations were attended by the Task Force and scheduled after the interviews with libraries.

## Koha ILS with ByWater Solutions

The demonstration emphasized the Koha interface's ease of use and that links within various areas of the Koha ILS interface will go directly to help menus created.

The integration between Koha and Aspen Discovery was also highlighted as a possibility and clear benefit if both are used in tandem. Title information in Koha could be displayed as links that open up directly in Aspen within the browser.

Metabase as a data anlalytics tool (used by Cuyahoga) was demonstrated and has great potential for creating visualizations and publicly available interactive usage metrics.

## Polaris ILS with Innovative Interfaces, Inc.

The demonstration of Polaris Leap showed a clean, well-designed staff interface. Leap was designed to be fully responsive to various screens and mobile devices, so for example, the Polaris Leap interface will run on a tablet, which makes it possible to bring the tablet to library collections for retrieval of holds, etc.

There were two reporting platforms, SimplyReports and Polaris Report Manager—that are available directly through Innovative Interfaces. The partnership with LibraryIQ was a third web-based reporting tool option for libraries demonstrated, which integrates with the Polaris database through a data harvest.

Overall, Polaris Leap was presented as part of an overall design strategy, which was reflected in a high quality web-based interface.

## BLUEcloud Staff with SirsiDynix
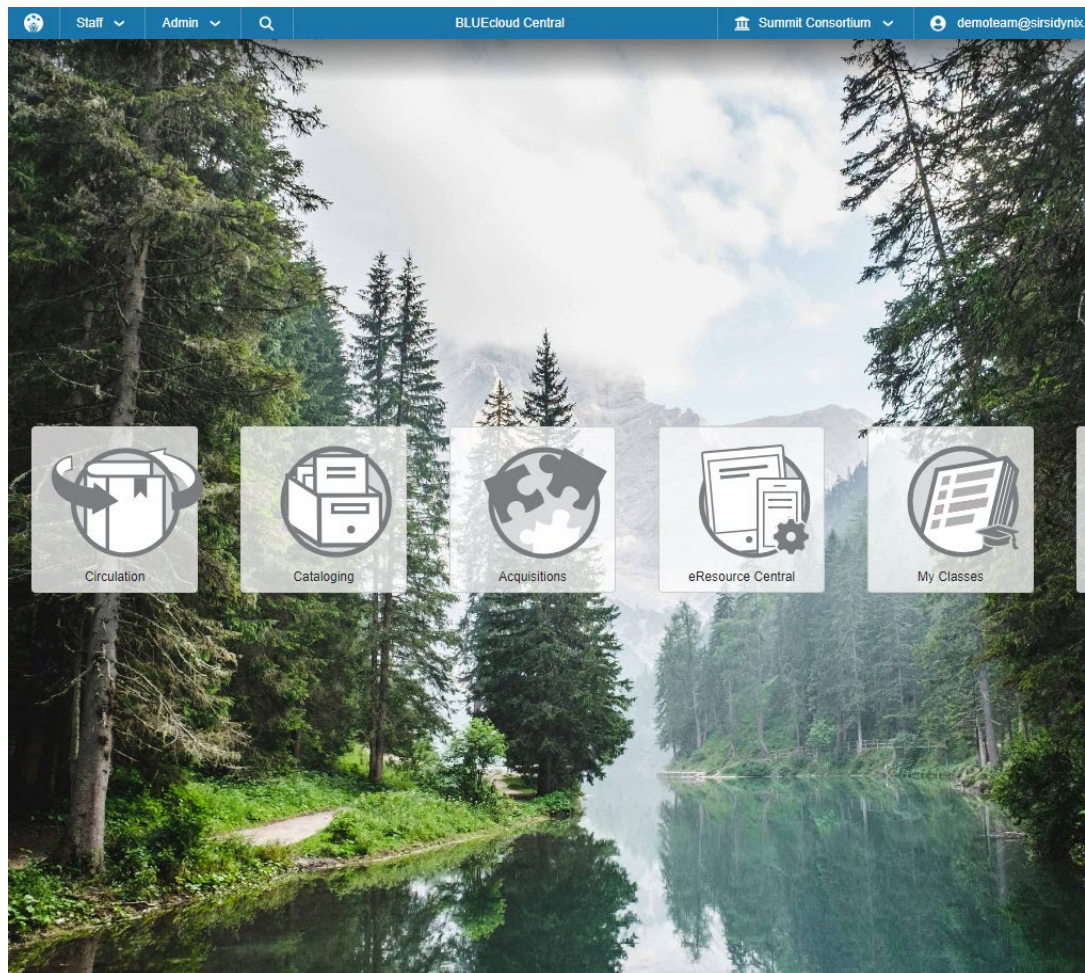


*Figure 6: BLUEcloud Staff after login and displaying functions*

The way BLUEcloud is conceptually constructed is to provide an easy path for libraries already using Symphony and WorkFlows to begin a transition to the new web-based interface for library staff. The data that current resides in Symphony will not have to be migrated and much of the knowledge around existing codes and named policies will be utilized within BLUEcloud Staff.



*Figure 7: Placing holds in BLUEcloud*

## BLUEcloud Staff interface progress

The question for SWAN is "when will BLUEcloud Staff be ready to use?" The answer is not straightforward, as "it depends."

- For libraries that rely on features like digital signatures for their patron registration process, this function is not yet ready in BLUEcloud Staff.
- For libraries relying on RFID integration within their hardware and WorkFlows, this integration is not ready in BLUEcloud Staff.

Those are just two examples. As the remaining "must haves" for the interface are completed, it could be entirely possible that BLUEcloud Circulation will be ready for wide SWAN use. The continued use of WorkFlows as a client will likely remain for the foreseeable future, and both BLUEcloud and WorkFlows will by and large remain options for SWAN or individual libraries as a choice.

# Conclusion

The two alternatives to the SirsiDynix solutions can be summarized as follows.

Polaris Leap and SimplyReports presents a similar path that SirsiDynix does for SWAN:

1. SWAN would contend with two interfaces for library staff usage (despite what Innovative Interfaces claims). The first being the older staff client, and the second being the newer web-based client Leap that continues to be enhanced.
2. Library analytics and reports would run within a separate web interface, SimplyReports. The interviews were mixed on the success of SimplyReports.
   a. It was easy to use by library staff.
   b. Sophistication in its ability to sum data within a consortium will be an ongoing issue.
   c. Other analytics are available to explore, such as Microsoft Reports and LibraryIQ.

Koha as a solution presents a more radical break from the status quo.

1. The Koha interface for library staff, reports, and consortia settings resides within a single interface.
2. Sophisticated reporting can exist outside of the Koha reports interface through the Metabase application, which queries the Koha ILS real-time.

SirsiDynix BLUEcloud suite is undergoing an infusion of software development starting in 2025 and its web-based solutions present the following.

1. BLUEcloud Staff will emerge as a solution for circulation functions first in 2026. The WorkFlows client will be preferred by some library staff due to its familiarity and power.
2. BLUEcloud Analytics will continue to undergo development in its administrative functions, but not necessarily simplifying the learning curve identified in SWAN's platform survey.

# Recommendations

The task force recommends retaining as much flexibility as possible at this stage so that the board and membership can decide on the next step of whether to issue an RFP. We have found that there are compelling, exciting options that will help resolve some of the dissatisfaction identified in the 2024 SWAN platform survey.

The Board and SWAN staff leadership should continue to review and provide recommendations based on the 2025 platform survey results.

SWAN should request a year-to-year renewal process with SirsiDynix and emphasize the desired features needed in BLUEcloud, while retaining SWAN's ability to seek a replacement at the time of its choosing. While this may have some negative financial outcomes with annual percentage

increases within the SirsiDynix contract, the Task Force believes the alternatives are much stronger than what is currently available with BLUEcloud Staff.

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