

SWAN BOARD MEETING AGENDA

September 18, 2026 9:30 a.m.

**Tinley Park Public Library
7851 Timber Drive
Tinley Park, IL 60477-5387**

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

Public comment is allowed at SWAN meetings

3. Action Item – Acceptance of the September 18, 2026 SWAN Board Meeting Agenda

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE SEPTEMBER 18, 2026 SWAN BOARD MEETING AGENDA AS PRESENTED

4. Action Item – Approval of SWAN Financials, July 2026 (Exhibit pgs. 3-14)
 - a. Balance sheet and detail of expenditures for July 2026
 - b. Approval of the payment of bills for July 1, 2026, through July 31, 2026 in the amount of \$103,999.99

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR JULY 1 THROUGH JULY 31, 2026 AND ACCEPTS THE BALANCE SHEET AND DETAIL OF EXPENDITURES FOR JULY 2026

5. Action Item – Approval of SWAN Financials, August 2026 (Exhibit pgs. 15-22)
 - a. Balance sheet and detail of expenditures for August 2026
 - b. Approval of the payment of bills for August 1, 2026, through August 31, 2026 in the amount of \$53,632.63

RESOLVED, THAT THE SWAN BOARD APPROVES THE PAYMENT OF BILLS FOR AUGUST 1 THROUGH AUGUST 31, 2026 AND ACCEPTS THE BALANCE SHEET AND DETAIL OF EXPENDITURES FOR AUGUST 2026

6. Action Item – Acceptance of the July 17, 2026, SWAN Board Meeting Minutes (Exhibit pgs. 23-25)

RESOLVED, THAT THE SWAN BOARD ACCEPTS THE JULY 17, 2026 SWAN BOARD
MEETING MINUTES AS PRESENTED

7. Reports
 - a. Board President Report
 - b. Executive Director Report (Exhibit pgs. 26-30)
 - c. Operations Report (Exhibit pgs. 31-51)
 - d. Treasurer Report
 - e. Board Calendar (Exhibit pgs. 52-53)
8. Action Item—Approve ILS Search Committee (Exhibit pg. 54)
9. Discussion Item—SWAN ILS & Analytics RFP document
10. Discussion Item—SirsiDynix agreement extension (Exhibit pgs. 55-68)
11. Discussion Item—SWAN strategic plan document (Exhibit pgs. 69-74)
12. Information Item – Review FY28 budget timetable (Exhibit pgs. 75-76)
13. Adjournment

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

SWAN Board Member	Library	Office	Term Expires
Dawn Bussey	Glen Ellyn Public Library	Treasurer	July 1, 2027
Zach Musil	Tinley Park Public Library	President	July 1, 2027
Laura Van Cleve	Richton Park Public Library		July 1, 2028
Ridgeway Burns	Itasca Community Library		July 1, 2028
Benjamin Weseloh	West Chicago Public Library		July 1, 2028
Kate Buckson	St Charles Public Library District		July 1, 2029
Tammy Sheedy	Berwyn Public Library		July 1, 2029



SWAN Library Services

Monthly Financial Report

For the Month Ended

July 31, 2026

Prepared By



Lauterbach & Amen

SWAN Library Services
Balance Sheet
As of July 31, 2026

	Balance End of Month
ASSETS	
Cash and Cash Equivalents	
Hinsdale Bank - Operating - 2176	304,013.87
Hinsdale Bank - MM - 5010	2,012,464.42
IMET Funds	385,501.94
Propay Funds	42.86
Total Cash and Cash Equivalents	<u>\$ 2,702,023.09</u>
Current Assets	
Accounts Receivable	215,952.38
REINT Receivable	-
Other Receivables	-
Deposits	8,352.42
Prepaid Expenses	239,383.27
Total Current Assets	<u>\$ 463,688.07</u>
Capital Assets, net	
Building and Improvements	6,895.00
Equipment	36,500.50
Computers	324,383.36
Accumulated Depreciation	(355,368.89)
Total Capital Assets, net	<u>\$ 12,409.97</u>
Other Assets	
Intangible Right to Use Asset - Office Space	553,961.57
Accumulated Amortization - Right to Use Asset	(258,280.43)
Subscription Asset	3,334,054.21
Accumulated Amortization - Subscription Asset	(2,000,727.27)
Total Other Assets	<u>\$ 1,629,008.08</u>
Total Assets	<u>\$ 4,807,129.21</u>
LIABILITIES	
Current Liabilities	
Library Consortia Special Interest Group Funds	6,481.22
Accrued Payroll	68,525.11
Compensated Absences	339,665.07
Lease Payable	329,087.00
Total Current Liabilities	<u>\$ 743,758.40</u>
Long Term Liabilities	
Subscription Liability	1,400,554.94
Accrued Interest Liability - SBITA	5,808.58
Total Long Term Liabilities	<u>\$ 1,406,363.52</u>
Total Liabilities	<u>\$ 2,150,121.92</u>
FUND BALANCE	
Beginning Net Assets	
Unrestricted	2,070,405.06
Total Beginning Net Assets	<u>\$ 2,070,405.06</u>
Current YTD Net Income	<u>\$ 586,602.23</u>
Total Fund Balance	<u>\$ 2,657,007.29</u>
Total Liabilities and Fund Balances	<u>\$ 4,807,129.21</u>

Statement of Revenue and Expenses Summary
For the 1 Month Ended July 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
Revenue					
4000 - Membership Fees	\$764,634.08	\$764,634.08	\$3,077,385.00	\$ 2,312,750.92	24.85%
4100 - Membership Reimbursements	-	-	5,600.00	5,600.00	0.00%
4200 - Reimbursement for Losses	8,664.81	8,664.81	91,200.00	82,535.19	9.50%
4300 - Grant Revenue	128,942.10	128,942.10	515,768.00	386,825.90	25.00%
4400 - Registration & Event Receipts	-	-	6,260.00	6,260.00	0.00%
4500 - Investment & Interest	6,996.55	6,996.55	125,000.00	118,003.45	5.60%
4600 - Reserve Fund Transfer	-	-	5,064.00	5,064.00	0.00%
Total Revenue	909,237.54	909,237.54	3,826,277.00	2,917,039.46	23.76%
Expenses					
5000 - Salaries & Wages	195,088.37	195,088.37	1,702,717.00	1,507,628.63	11.46%
5020 - Personnel Benefits	45,585.24	45,585.24	482,500.00	436,914.76	9.45%
5100 - Building & Grounds	515.65	515.65	52,760.00	52,244.35	0.98%
5200 - Professional Development	240.94	240.94	27,030.00	26,789.06	0.89%
5300 - Membership Development	-	-	11,800.00	11,800.00	0.00%
5400 - Information & Technology Services	62,570.84	62,570.84	1,287,300.00	1,224,729.16	4.86%
5500 - General Office	129.78	129.78	4,300.00	4,170.22	3.02%
5600 - Hardware & Equipment	10.00	10.00	3,000.00	2,990.00	0.33%
5700 - Insurance	-	-	13,700.00	13,700.00	0.00%
5800 - Contractual Services	8,931.84	8,931.84	143,460.00	134,528.16	6.23%
5900 - Library Materials & Content	8,871.02	8,871.02	91,200.00	82,328.98	9.73%
6000 - Interest & Fees	691.63	691.63	5,050.00	4,358.37	13.70%
Total Expenses	322,635.31	322,635.31	3,826,277.00	3,503,641.69	8.43%
Excess Revenues less Expenses	\$ 586,602.23	\$ 586,602.23	\$ 0.00	\$ (586,602.23)	

Statement of Revenue and Expenses

For the 1 Month Ended July 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
Revenue					
4010 - SWAN Full Membership Fees	\$ 764,634.08	\$ 764,634.08	\$ 3,073,185.00	\$ 2,308,550.92	24.88%
4011 - SWAN Internet Access Membership Fees	0.00	0.00	4,200.00	4,200.00	0.00%
4190 - Member Group Purchase Receipts	0.00	0.00	5,600.00	5,600.00	0.00%
4220 - Reimbursement Losses for Resource Sharing	8,664.81	8,664.81	47,800.00	39,135.19	18.13%
4240 - E-Commerce Transactions	0.00	0.00	43,400.00	43,400.00	0.00%
4310 - RAILS Support to SWAN	128,942.10	128,942.10	515,768.00	386,825.90	25.00%
4499 - Annual Conference Receipts	0.00	0.00	6,260.00	6,260.00	0.00%
4510 - Interest Income	6,996.55	6,996.55	100,000.00	93,003.45	7.00%
4520 - Investment Income	0.00	0.00	25,000.00	25,000.00	0.00%
4600 - Reserve Fund Transfer	0.00	0.00	5,064.00	5,064.00	0.00%
Total Revenue	909,237.54	909,237.54	3,826,277.00	2,917,039.46	23.76%
Expenses					
5000 - Salaries & Wages	195,088.37	195,088.37	1,702,717.00	1,507,628.63	11.46%
5021 - FICA Expense	14,599.85	14,599.85	115,000.00	100,400.15	12.70%
5023 - Worker's Compensation	0.00	0.00	3,900.00	3,900.00	0.00%
5024 - Retirement Benefits	12,407.66	12,407.66	167,100.00	154,692.34	7.43%
5025 - Health, Dental, Life And Disability Insurance	18,352.57	18,352.57	195,000.00	176,647.43	9.41%
5026 - Tuition Reimbursements	0.00	0.00	1,100.00	1,100.00	0.00%
5085 - Staff Wellness	225.16	225.16	400.00	174.84	56.29%
5110 - Rent/Lease	0.00	0.00	50,600.00	50,600.00	0.00%
5120 - Utilities	313.06	313.06	1,200.00	886.94	26.09%
5140 - Repairs & Maintenance	202.59	202.59	960.00	757.41	21.10%
5210 - Conference Travel	240.94	240.94	10,000.00	9,759.06	2.41%
5220 - Staff Meetings	0.00	0.00	900.00	900.00	0.00%
5230 - Staff Professional Development	0.00	0.00	7,000.00	7,000.00	0.00%
5240 - Professional Association Membership Dues	0.00	0.00	1,300.00	1,300.00	0.00%
5250 - Educational Material	0.00	0.00	800.00	800.00	0.00%
5260 - Online Learning	0.00	0.00	7,030.00	7,030.00	0.00%
5310 - Travel Reimbursement	0.00	0.00	2,000.00	2,000.00	0.00%
5320 - Membership Meetings	0.00	0.00	300.00	300.00	0.00%
5330 - Library Professional Development	0.00	0.00	9,500.00	9,500.00	0.00%
5420 - Application Software Licensing	1,118.85	1,118.85	16,800.00	15,681.15	6.66%
5430 - Server Software Licensing	6,799.70	6,799.70	129,000.00	122,200.30	5.27%
5440 - Library Services Platform	1,609.50	1,609.50	1,049,700.00	1,048,090.50	0.15%
5450 - Data Management Services	9,099.14	9,099.14	35,100.00	26,000.86	25.92%
5460 - Information Subscription Service	21,751.42	21,751.42	21,800.00	48.58	99.78%
5470 - Subscription Support Services	21,600.00	21,600.00	25,200.00	3,600.00	85.71%
5480 - Telecommunications	592.23	592.23	7,100.00	6,507.77	8.34%
5490 - Group Purchases - Services	0.00	0.00	2,600.00	2,600.00	0.00%
5510 - Office Supplies	48.65	48.65	3,500.00	3,451.35	1.39%
5520 - Postage	65.15	65.15	800.00	734.85	8.14%
5599 - Annual Conference Supplies	15.98	15.98	0.00	(15.98)	0.00%
5620 - Hardware	10.00	10.00	0.00	(10.00)	0.00%
5690 - Group Purchases - Hardware	0.00	0.00	3,000.00	3,000.00	0.00%
5700 - Insurance	0.00	0.00	13,700.00	13,700.00	0.00%
5810 - Legal	0.00	0.00	6,000.00	6,000.00	0.00%
5820 - Accounting	1,105.00	1,105.00	22,060.00	20,955.00	5.01%
5830 - Consulting	0.00	0.00	12,800.00	12,800.00	0.00%
5840 - Payroll Service Fees	456.43	456.43	4,600.00	4,143.57	9.92%
5860 - Notification & Collection	7,370.41	7,370.41	85,900.00	78,529.59	8.58%
5899 - Annual Conference Facility Contract	0.00	0.00	12,100.00	12,100.00	0.00%

Statement of Revenue and Expenses

For the 1 Month Ended July 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
5920 - Reimburse for Resource Sharing	8,871.02	8,871.02	47,800.00	38,928.98	18.56%
5940 - E-Commerce Payment Transactions	0.00	0.00	43,400.00	43,400.00	0.00%
6010 - Bank Fees	691.63	691.63	5,000.00	4,308.37	13.83%
6020 - Merchant Account Fees	0.00	0.00	50.00	50.00	0.00%
6110 - Depreciation	0.00	0.00	1,460.00	1,460.00	0.00%
Total Expenses	<u>322,635.31</u>	<u>322,635.31</u>	<u>3,826,277.00</u>	<u>3,503,641.69</u>	<u>8.43%</u>
Excess Revenues less Expenses	<u>\$ 586,602.23</u>	<u>\$ 586,602.23</u>	<u>\$ 0.00</u>	<u>\$ (586,602.23)</u>	

SWAN Library Services

Check Register

All Bank Accounts

July 2026

Payee / Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Vendor Checks						
Addison Public Library				11760	07/14/26	<u>666.48</u>
5920	Reimburse for Resource Sharing	Addison Public Library	666.48			
Bedford Park Public Library District				11761	07/14/26	<u>24.00</u>
5920	Reimburse for Resource Sharing	Bedford Park Public Library District	24.00			
Bellwood Public Library				11762	07/14/26	<u>29.28</u>
5920	Reimburse for Resource Sharing	Bellwood Public Library	29.28			
Berkeley Public Library				11763	07/14/26	<u>93.25</u>
5920	Reimburse for Resource Sharing	Berkeley Public Library	93.25			
Bloomington Public Library				11764	07/14/26	<u>483.38</u>
5920	Reimburse for Resource Sharing	Bloomington Public Library	483.38			
Blue Island Public Library				11765	07/14/26	<u>130.31</u>
5920	Reimburse for Resource Sharing	Blue Island Public Library	130.31			
Broadview Public Library District				11766	07/14/26	<u>55.11</u>
5920	Reimburse for Resource Sharing	Broadview Public Library District	55.11			
Chicago Ridge Public Library				11767	07/14/26	<u>230.82</u>
5920	Reimburse for Resource Sharing	Chicago Ridge Public Library	230.82			
Crestwood Public Library District				11768	07/14/26	<u>83.43</u>
5920	Reimburse for Resource Sharing	Crestwood Public Library District	83.43			
Crete Public Library District				11769	07/14/26	<u>61.01</u>
5920	Reimburse for Resource Sharing	Crete Public Library District	61.01			
Eisenhower Public Library District				11770	07/14/26	<u>524.19</u>
5920	Reimburse for Resource Sharing	Eisenhower Public Library District	524.19			
Flossmoor Public Library				11771	07/14/26	<u>256.15</u>
5920	Reimburse for Resource Sharing	Flossmoor Public Library	256.15			

SWAN Library Services

Check Register

All Bank Accounts

July 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Frankfort Public Library District				11772	07/14/26	<u>327.00</u>
5920	Reimburse for Resource Sharing	Frankfort Public Library District	327.00			
Franklin Park Public Library District				11773	07/14/26	<u>171.13</u>
5920	Reimburse for Resource Sharing	Franklin Park Public Library District	171.13			
Glen Ellyn Public Library				11774	07/14/26	<u>157.52</u>
5920	Reimburse for Resource Sharing	Glen Ellyn Public Library	157.52			
Glenwood-Lynwood Public Library				11775	07/14/26	<u>64.01</u>
5920	Reimburse for Resource Sharing	Glenwood-Lynwood Public Library	64.01			
Hillside Public Library				11776	07/14/26	<u>164.05</u>
5920	Reimburse for Resource Sharing	Hillside Public Library	164.05			
Hodgkins Public Library District				11777	07/14/26	<u>20.00</u>
5920	Reimburse for Resource Sharing	Hodgkins Public Library District	20.00			
Homewood Public Library District				11778	07/14/26	<u>399.02</u>
5920	Reimburse for Resource Sharing	Homewood Public Library District	399.02			
Itasca Community Library				11779	07/14/26	<u>213.25</u>
5920	Reimburse for Resource Sharing	Itasca Community Library	213.25			
Kaneville Public Library District				11780	07/14/26	<u>30.00</u>
5920	Reimburse for Resource Sharing	Kaneville Public Library District	30.00			
La Grange Park Public Library District				11781	07/14/26	<u>28.10</u>
5920	Reimburse for Resource Sharing	La Grange Park Public Library District	28.10			
Lansing Public Library				11782	07/14/26	<u>261.93</u>
5920	Reimburse for Resource Sharing	Lansing Public Library	261.93			
Matteson Public Library				11783	07/14/26	<u>401.51</u>
5920	Reimburse for Resource Sharing	Matteson Public Library	401.51			

SWAN Library Services

Check Register

All Bank Accounts

July 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Melrose Park Public Library				11784	07/14/26	<u>146.73</u>
5920	Reimburse for Resource Sharing	Melrose Park Public Library	146.73			
Messenger Public Library of North Aurora				11785	07/14/26	<u>221.19</u>
5920	Reimburse for Resource Sharing	Messenger Public Library of North Aurora	221.19			
Midlothian Public Library				11786	07/14/26	<u>166.51</u>
5920	Reimburse for Resource Sharing	Midlothian Public Library	166.51			
Nancy L. McConathy Public Library District				11787	07/14/26	<u>231.00</u>
5920	Reimburse for Resource Sharing	Nancy L. McConathy Public Library District	231.00			
National University of Health Sciences				11788	07/14/26	<u>75.00</u>
5920	Reimburse for Resource Sharing	National University of Health Sciences	75.00			
North Riverside Public Library District				11789	07/14/26	<u>94.03</u>
5920	Reimburse for Resource Sharing	North Riverside Public Library District	94.03			
Oak Lawn Public Library				11790	07/14/26	<u>583.51</u>
5920	Reimburse for Resource Sharing	Oak Lawn Public Library	583.51			
Palos Heights Public Library				11791	07/14/26	<u>84.15</u>
5920	Reimburse for Resource Sharing	Palos Heights Public Library	84.15			
Richton Park Public Library District				11792	07/14/26	<u>145.75</u>
5920	Reimburse for Resource Sharing	Richton Park Public Library District	145.75			
River Forest Public Library				11793	07/14/26	<u>12.28</u>
5920	Reimburse for Resource Sharing	River Forest Public Library	12.28			
Riverdale Public Library District				11794	07/14/26	<u>10.00</u>
5920	Reimburse for Resource Sharing	Riverdale Public Library District	10.00			
Schiller Park Public Library				11795	07/14/26	<u>13.41</u>
5920	Reimburse for Resource Sharing	Schiller Park Public Library	13.41			

SWAN Library Services

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All Bank Accounts

July 2026

Payee / Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
South Holland Public Library				11796	07/14/26	<u>191.27</u>
5920	Reimburse for Resource Sharing	South Holland Public Library	191.27			
Stickney-Forest View Public Library District				11797	07/14/26	<u>43.01</u>
5920	Reimburse for Resource Sharing	Stickney-Forest View Public Library District	43.01			
Sugar Grove Public Library District				11798	07/14/26	<u>44.78</u>
5920	Reimburse for Resource Sharing	Sugar Grove Public Library District	44.78			
Summit Public Library District				11799	07/14/26	<u>528.35</u>
5920	Reimburse for Resource Sharing	Summit Public Library District	528.35			
The Morton Arboretum				11800	07/14/26	<u>100.00</u>
5920	Reimburse for Resource Sharing	The Morton Arboretum	100.00			
The Theosophical Society in America				11801	07/14/26	<u>15.99</u>
5920	Reimburse for Resource Sharing	The Theosophical Society in America	15.99			
Thomas Ford Memorial Library				11802	07/14/26	<u>130.04</u>
5920	Reimburse for Resource Sharing	Thomas Ford Memorial Library	130.04			
Tinley Park Public Library				11803	07/14/26	<u>329.53</u>
5920	Reimburse for Resource Sharing	Tinley Park Public Library	329.53			
Westmont Public Library				11804	07/14/26	<u>302.29</u>
5920	Reimburse for Resource Sharing	Westmont Public Library	302.29			
William Leonard Public Library District				11805	07/14/26	<u>10.00</u>
5920	Reimburse for Resource Sharing	William Leonard Public Library District	10.00			
Wood Dale Public Library District				11806	07/14/26	<u>306.63</u>
5920	Reimburse for Resource Sharing	Wood Dale Public Library District	306.63			
Woodridge Public Library				11807	07/14/26	<u>210.64</u>

SWAN Library Services

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All Bank Accounts

July 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5920	Reimburse for Resource Sharing	Woodridge Public Library	210.64			
United States Treasury				11808	07/15/26	<u>65.28</u>
6010	Bank Fees	United States Treasury PCORI Fee	65.28			
Backstage Library Works				ACH Backstage	07/23/26	<u>5,252.00</u>
5450	Data Management Services	Backstage Library Works - Authority Control Processing	4,695.70			
5450	Data Management Services	Backstage Library Works - Authority Control Procesing	556.30			
Comcast				ACH Comcast	07/06/26	<u>254.95</u>
5480	Telecommunications	Comcast - Jun 11, 2026 to Jul 10, 2026	254.95			
ComEd				ACH ComEd	07/22/26	<u>313.06</u>
5120	Utilities	ComEd - 6/5/26 THROUGH 7/7/26	313.06			
First Bankcard				ACH FirstCard	07/15/26	<u>7,739.20</u>
5620	Hardware	First Bankcard - Best Buy laptop	709.00			
5620	Hardware	First Bankcard - Best Buy laptop	-699.00			
5420	Application Software Licensing	First Bankcard	982.25			
5510	Office Supplies	First Bankcard - Amazon headset	48.65			
5480	Telecommunications	First Bankcard - Grasshopper	49.28			
5140	Repairs & Maintenance	First Bankcard - Imperial Surveillance	202.59			
5520	Postage	First Bankcard	65.15			
5430	Server Software Licensing	First Bankcard - DNS made easy	1,548.43			
5480	Telecommunications	First Bankcard - Microsoft calling plan	288.00			
5860	Notification & Collection	First Bankcard - Sendgrid	289.00			
5420	Application Software Licensing	First Bankcard - Microsoft	75.60			
5430	Server Software Licensing	First Bankcard - Microsoft Azure	4,103.27			
5420	Application Software Licensing	First Bankcard - Mailchimp	61.00			
5599	Annual Conference Supplies	First Bankcard - EXPO supplies	15.98			
Halo Software				ACH Halo	07/24/26	<u>21,600.00</u>
5470	Subscription Support Services	Halo Software - annual renewal	21,600.00			

SWAN Library Services

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All Bank Accounts

July 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Lauterbach & Amen, LLP				ACH L&A	07/24/26	<u>1,105.00</u>
5820	Accounting	Lauterbach & Amen, LLP - June	1,105.00			
LIMRiCC				ACH LIMRiCC	07/24/26	<u>21,924.76</u>
5025	Health, Dental, Life And Disability Insurance	LIMRiCC - July	21,924.76			
Lucas McKeever				ACH McKeever	07/17/26	<u>72.35</u>
5210	Conference Travel	Lucas McKeever - conference	72.35			
ProQuest LLC				ACH ProQuest	07/24/26	<u>21,751.42</u>
5460	Information Subscription Service	ProQuest LLC - catalog enhancement service SWAN OPAC	21,751.42			
Reaching Across Illinois Library System				ACH RAILS	07/24/26	<u>3,847.14</u>
5450	Data Management Services	Reaching Across Illinois Library System - RDA Toolkit	3,847.14			
Cynthia Romanowski				ACH Romanowski	07/20/26	<u>168.59</u>
5210	Conference Travel	Cynthia Romanowski - conference	168.59			
Reliance Standard Life Insurance Co.				ACH RSLI	07/23/26	<u>1,028.63</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co. - July	1,028.63			
xecurify				ACH xecurify	07/16/26	<u>1,148.00</u>
5430	Server Software Licensing	xecurify - Drupal	849.00			
5430	Server Software Licensing	xecurify - miniOrange support	299.00			
Springshare, LLC				ACH Springshare	07/24/26	<u>1,609.50</u>
5440	Library Services Platform	Springshare, LLC - patron point qtrly usage	1,609.50			
Unique Integrated Communications, Inc.				ACH UMS	07/24/26	<u>7,081.41</u>
5860	Notification & Collection	Unique Integrated Communications, Inc. - Message Bee	6,690.50			
5860	Notification & Collection	Unique Integrated Communications, Inc. Notices	390.91			

SWAN Library Services

Check Register

All Bank Accounts

July 2026

Payee / Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Wellness Insurance Network-WIN				ACH WIN	07/24/26	<u>167.68</u>
5025	Health, Dental, Life And Disability Insurance	Wellness Insurance Network-WIN - July	167.68			
					Check List Total	<u><u>103,999.99</u></u>



SWAN Library Services

Monthly Financial Report

For the Month Ended

August 31, 2026

Prepared By



Lauterbach & Amen

SWAN Library Services
Balance Sheet
As of August 31, 2026

	Balance End of Month
ASSETS	
Cash and Cash Equivalents	
Hinsdale Bank - Operating - 2176	133,979.77
Hinsdale Bank - MM - 5010	2,169,474.10
IMET Funds	386,638.15
Propay Funds	42.86
Total Cash and Cash Equivalents	<u>\$ 2,690,134.88</u>
Current Assets	
Accounts Receivable	33,389.08
REINT Receivable	-
Other Receivables	-
Deposits	8,352.42
Prepaid Expenses	239,383.27
Total Current Assets	<u>\$ 281,124.77</u>
Capital Assets, net	
Building and Improvements	6,895.00
Equipment	36,500.50
Computers	324,383.36
Accumulated Depreciation	(355,368.89)
Total Capital Assets, net	<u>\$ 12,409.97</u>
Other Assets	
Intangible Right to Use Asset - Office Space	553,961.57
Accumulated Amortization - Right to Use Asset	(258,280.43)
Subscription Asset	3,334,054.21
Accumulated Amortization - Subscription Asset	(2,000,727.27)
Total Other Assets	<u>\$ 1,629,008.08</u>
Total Assets	<u>\$ 4,612,677.70</u>
LIABILITIES	
Current Liabilities	
Library Consortia Special Interest Group Funds	6,550.65
Accrued Payroll	68,525.11
Compensated Absences	339,665.07
Lease Payable	329,087.00
Total Current Liabilities	<u>\$ 743,827.83</u>
Long Term Liabilities	
Subscription Liability	1,400,554.94
Accrued Interest Liability - SBITA	5,808.58
Total Long Term Liabilities	<u>\$ 1,406,363.52</u>
Total Liabilities	<u>\$ 2,150,191.35</u>
FUND BALANCE	
Beginning Net Assets	
Unrestricted	2,070,405.06
Total Beginning Net Assets	<u>\$ 2,070,405.06</u>
Current YTD Net Income	<u>\$ 392,081.29</u>
Total Fund Balance	<u>\$ 2,462,486.35</u>
Total Liabilities and Fund Balances	<u><u>\$ 4,612,677.70</u></u>

Statement of Revenue and Expenses Summary

For the 2 Months Ended August 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
Revenue					
4000 - Membership Fees	\$1,831.33	\$766,465.41	\$3,077,385.00	\$ 2,310,919.59	24.91%
4100 - Membership Reimbursements	85.00	85.00	5,600.00	5,515.00	1.52%
4200 - Reimbursement for Losses	-	8,664.81	91,200.00	82,535.19	9.50%
4300 - Grant Revenue	-	128,942.10	515,768.00	386,825.90	25.00%
4400 - Registration & Event Receipts	-	-	6,260.00	6,260.00	0.00%
4500 - Investment & Interest	8,145.89	15,142.44	125,000.00	109,857.56	12.11%
4600 - Reserve Fund Transfer	-	-	5,064.00	5,064.00	0.00%
Total Revenue	10,062.22	919,299.76	3,826,277.00	2,906,977.24	24.03%
Expenses					
5000 - Salaries & Wages	132,393.63	327,482.00	1,702,717.00	1,375,235.00	19.23%
5020 - Personnel Benefits	40,700.78	86,286.02	482,500.00	396,213.98	17.88%
5100 - Building & Grounds	8,903.71	9,419.36	52,760.00	43,340.64	17.85%
5200 - Professional Development	1,323.78	1,564.72	27,030.00	25,465.28	5.79%
5300 - Membership Development	-	-	11,800.00	11,800.00	0.00%
5400 - Information & Technology Services	11,605.64	74,176.48	1,287,300.00	1,213,123.52	5.76%
5500 - General Office	185.21	314.99	4,300.00	3,985.01	7.33%
5600 - Hardware & Equipment	-	10.00	3,000.00	2,990.00	0.33%
5700 - Insurance	-	-	13,700.00	13,700.00	0.00%
5800 - Contractual Services	8,864.29	17,796.13	143,460.00	125,663.87	12.40%
5900 - Library Materials & Content	-	8,871.02	91,200.00	82,328.98	9.73%
6000 - Interest & Fees	606.12	1,297.75	5,050.00	3,752.25	25.70%
Total Expenses	204,583.16	527,218.47	3,826,277.00	3,299,058.53	13.78%
Excess Revenues less Expenses	\$ (194,520.94)	\$ 392,081.29	\$ 0.00	\$ (392,081.29)	

Statement of Revenue and Expenses

For the 2 Months Ended August 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
Revenue					
4010 - SWAN Full Membership Fees	\$ 1,831.33	\$ 766,465.41	\$ 3,073,185.00	\$ 2,306,719.59	24.94%
4011 - SWAN Internet Access Membership Fees	0.00	0.00	4,200.00	4,200.00	0.00%
4190 - Member Group Purchase Receipts	85.00	85.00	5,600.00	5,515.00	1.52%
4220 - Reimbursement Losses for Resource Sharing	0.00	8,664.81	47,800.00	39,135.19	18.13%
4240 - E-Commerce Transactions	0.00	0.00	43,400.00	43,400.00	0.00%
4310 - RAILS Support to SWAN	0.00	128,942.10	515,768.00	386,825.90	25.00%
4499 - Annual Conference Receipts	0.00	0.00	6,260.00	6,260.00	0.00%
4510 - Interest Income	8,145.89	15,142.44	100,000.00	84,857.56	15.14%
4520 - Investment Income	0.00	0.00	25,000.00	25,000.00	0.00%
4600 - Reserve Fund Transfer	0.00	0.00	5,064.00	5,064.00	0.00%
Total Revenue	10,062.22	919,299.76	3,826,277.00	2,906,977.24	24.03%
Expenses					
5000 - Salaries & Wages	132,393.63	327,482.00	1,702,717.00	1,375,235.00	19.23%
5021 - FICA Expense	9,788.77	24,388.62	115,000.00	90,611.38	21.21%
5023 - Worker's Compensation	0.00	0.00	3,900.00	3,900.00	0.00%
5024 - Retirement Benefits	12,407.66	24,815.32	167,100.00	142,284.68	14.85%
5025 - Health, Dental, Life And Disability Insurance	18,434.35	36,786.92	195,000.00	158,213.08	18.87%
5026 - Tuition Reimbursements	0.00	0.00	1,100.00	1,100.00	0.00%
5085 - Staff Wellness	70.00	295.16	400.00	104.84	73.79%
5110 - Rent/Lease	8,466.84	8,466.84	50,600.00	42,133.16	16.73%
5120 - Utilities	311.87	624.93	1,200.00	575.07	52.08%
5140 - Repairs & Maintenance	125.00	327.59	960.00	632.41	34.12%
5210 - Conference Travel	328.80	569.74	10,000.00	9,430.26	5.70%
5220 - Staff Meetings	425.00	425.00	900.00	475.00	47.22%
5230 - Staff Professional Development	379.98	379.98	7,000.00	6,620.02	5.43%
5240 - Professional Association Membership Dues	190.00	190.00	1,300.00	1,110.00	14.62%
5250 - Educational Material	0.00	0.00	800.00	800.00	0.00%
5260 - Online Learning	0.00	0.00	7,030.00	7,030.00	0.00%
5310 - Travel Reimbursement	0.00	0.00	2,000.00	2,000.00	0.00%
5320 - Membership Meetings	0.00	0.00	300.00	300.00	0.00%
5330 - Library Professional Development	0.00	0.00	9,500.00	9,500.00	0.00%
5420 - Application Software Licensing	136.60	1,255.45	16,800.00	15,544.55	7.47%
5430 - Server Software Licensing	6,494.42	13,294.12	129,000.00	115,705.88	10.31%
5440 - Library Services Platform	0.00	1,609.50	1,049,700.00	1,048,090.50	0.15%
5450 - Data Management Services	474.60	9,573.74	35,100.00	25,526.26	27.28%
5460 - Information Subscription Service	0.00	21,751.42	21,800.00	48.58	99.78%
5470 - Subscription Support Services	3,907.79	25,507.79	25,200.00	(307.79)	101.22%
5480 - Telecommunications	592.23	1,184.46	7,100.00	5,915.54	16.68%
5490 - Group Purchases - Services	0.00	0.00	2,600.00	2,600.00	0.00%
5510 - Office Supplies	26.46	75.11	3,500.00	3,424.89	2.15%
5520 - Postage	158.75	223.90	800.00	576.10	27.99%
5599 - Annual Conference Supplies	0.00	15.98	0.00	(15.98)	0.00%
5620 - Hardware	0.00	10.00	0.00	(10.00)	0.00%
5690 - Group Purchases - Hardware	0.00	0.00	3,000.00	3,000.00	0.00%
5700 - Insurance	0.00	0.00	13,700.00	13,700.00	0.00%
5810 - Legal	0.00	0.00	6,000.00	6,000.00	0.00%
5820 - Accounting	1,150.00	2,255.00	22,060.00	19,805.00	10.22%
5830 - Consulting	0.00	0.00	12,800.00	12,800.00	0.00%
5840 - Payroll Service Fees	383.42	839.85	4,600.00	3,760.15	18.26%
5860 - Notification & Collection	7,330.87	14,701.28	85,900.00	71,198.72	17.11%
5899 - Annual Conference Facility Contract	0.00	0.00	12,100.00	12,100.00	0.00%

Statement of Revenue and Expenses
For the 2 Months Ended August 31, 2026

	Month-to-Date Actual	Year-to-Date Actual	Annual Budget	Remaining Budget	% Collected Expended
5920 - Reimburse for Resource Sharing	0.00	8,871.02	47,800.00	38,928.98	18.56%
5940 - E-Commerce Payment Transactions	0.00	0.00	43,400.00	43,400.00	0.00%
6010 - Bank Fees	606.12	1,297.75	5,000.00	3,702.25	25.96%
6020 - Merchant Account Fees	0.00	0.00	50.00	50.00	0.00%
6110 - Depreciation	0.00	0.00	1,460.00	1,460.00	0.00%
Total Expenses	<u>204,583.16</u>	<u>527,218.47</u>	<u>3,826,277.00</u>	<u>3,299,058.53</u>	<u>13.78%</u>
Excess Revenues less Expenses	<u>\$ (194,520.94)</u>	<u>\$ 392,081.29</u>	<u>\$ 0.00</u>	<u>\$ (392,081.29)</u>	

SWAN Library Services

Check Register

All Bank Accounts

August 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Vendor Checks						
Margaret Cosgrove				11754	08/31/26	<u>(69.43)</u>
2005	Library Consortia Special Interest Group Funds	To VOID check 11754	-69.43			
Angela Puckett						
5220	Staff Meetings	Angela Puckett	100.00	11809	08/13/26	<u>100.00</u>
David Pacin						
5220	Staff Meetings	David Pacin	125.00	11810	08/13/26	<u>125.00</u>
Mary Alice Buckley						
5220	Staff Meetings	Mary Alice Buckley	200.00	11811	08/13/26	<u>200.00</u>
Backstage Library Works						
5450	Data Management Services	Backstage Library Works - MARS authority control processing	474.60	ACH Backstage	08/27/26	<u>474.60</u>
Comcast						
5480	Telecommunications	Comcast - Aug 11, 2026 to Sep 10, 2026	254.95	ACH Comcast	08/04/26	<u>254.95</u>
ComEd						
5120	Utilities	Comed - 7/7/26 THROUGH 8/5/26	311.87	ACH ComEd	08/20/26	<u>311.87</u>
First Bankcard						
5240	Professional Association Membership Dues	First Bankcard - ALA membership dues - Skog	190.00	ACH Credit card	08/14/26	<u>8,112.51</u>
5230	Staff Professional Development	First Bankcard - ILA conference registration - Skog	355.00			
5140	Repairs & Maintenance	First Bankcard - Elian Electronics - removal of IT cabinet	125.00			
5520	Postage	First Bankcard	80.75			
5480	Telecommunications	First Bankcard - Grasshopper	49.28			
5520	Postage	First Bankcard	78.00			
5430	Server Software Licensing	First Bankcard - DNS Made Easy	1,400.55			
5480	Telecommunications	First Bankcard - Microsoft calling plan	288.00			
5860	Notification & Collection	First Bankcard - Sendgrid	289.00			
5430	Server Software Licensing	First Bankcard - DNS Made Easy	1,145.90			

SWAN Library Services

Check Register

All Bank Accounts

August 2026

Payee/Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
5420	Application Software Licensing	First Bankcard - Microsoft	75.60			
5430	Server Software Licensing	First Bankcard - Microsoft Azure	3,947.97			
5420	Application Software Licensing	First Bankcard - Mailchimp	61.00			
5510	Office Supplies	First Bankcard - plant shop	26.46			
915 Harger Group				ACH Harger Road	08/11/26	<u>4,176.21</u>
5110	Rent/Lease	915 Harger Group - August	4,176.21			
915 Harger Group				ACH Harger Road	08/27/26	<u>4,290.63</u>
5110	Rent/Lease	915 Harger Group - September	4,290.63			
Lauterbach & Amen, LLP				ACH L&A	08/27/26	<u>1,150.00</u>
5820	Accounting	Lauterbach & Amen, LLP - July	1,150.00			
LIMRiCC				ACH LIMRiCC	08/27/26	<u>21,924.76</u>
5025	Health, Dental, Life And Disability Insurance	LIMRiCC - August	21,924.76			
Lucas McKeever				ACH McKeever	08/27/26	<u>353.78</u>
5210	Conference Travel	Lucas McKeever - flight to OKC ApsenCon	328.80			
5230	Staff Professional Development	Lucas McKeever - Registration for AspenCon	24.98			
OCLC, Inc.				ACH OCLC	08/12/26	<u>3,907.79</u>
5470	Subscription Support Services	OCLC, Inc. - WebDewey subscription 7/1/26-6/30/27	3,907.79			
Reliance Standard Life Insurance Co.				ACH RSLI	08/27/26	<u>1,110.41</u>
5025	Health, Dental, Life And Disability Insurance	Reliance Standard Life Insurance Co. August	1,110.41			
Unique Integrated Communications, Inc.				ACH UMS	08/27/26	<u>7,041.87</u>
5860	Notification & Collection	Unique Integrated Communications, Inc. - Notices July	351.37			
5860	Notification & Collection	Unique Integrated Communications, Inc. - MessageBee July	6,690.50			

SWAN Library Services

Check Register

All Bank Accounts

August 2026

Payee / Account #	Account Description	Description	Amount	Check Number	Check Date	Check Amount
Wellness Insurance Network-WIN				ACH WIN	08/27/26	<u>167.68</u>
5025	Health, Dental, Life And Disability Insurance	Wellness Insurance Network-WIN - September	167.68			
					Check List Total	<u><u>53,632.63</u></u>

SWAN BOARD MEETING MINUTES

July 17, 2026, 9:30 a.m.

Glen Ellyn Public Library

400 Duane Street

Glen Ellyn, IL 60137

1. Call to Order, Roll Call

President Musil called the meeting to order at 9:35 a.m. The following Board members were present to establish a quorum.

Ridgeway Burns

Dawn Bussey

Tammy Sheedy

Zach Musil

Ben Weseloh – arrived at 10:15 a.m.

2. Introduction of Visitors/Public Comment

Aaron Skog, SWAN Executive Director

Scott Brandwein, SWAN Assistant Director

Ginny Blake, SWAN Business Manager

There was no public comment.

3. Action Item

Acceptance of July 17, 2026 SWAN Board Meeting Agenda

Bussey moved, seconded by Burns that it be

RESOLVED THAT THE SWAN BOARD ACCEPTS THE JULY 17, 2026, SWAN BOARD MEETING AGENDA AS PRESENTED

Motion carried by unanimous voice vote.

4. Action Item

Appoint officers & committee members

After discussion, the board agreed on the following slate:

Musil – Board President

Burns – Board Vice-President

Bussey – Board Treasurer

Weseloh – Board Secretary

Personnel Committee

Bussey, Weseloh

Finance Committee
Bussey, Buckson, Weseloh

Policy Committee
Musil, Van Cleve

Strategic Planning Committee
Dissolve the committee

Motion carried by roll call vote with the following results:

Ayes: Burns, Bussey, Musil, Sheedy

5. **Action Item**

Approval of SWAN Financials, July 2026

Burns moved, seconded by Sheedy that it be

RESOLVED THAT THE SWAN BOARD APPROVES THE JULY 17, 2026, SWAN BOARD MEETING MINUTES AS PRESENTED

Motion carried by roll call with the following results:

Ayes: Burns, Bussey, Musil, Weseloh

6. **Action Item**

Acceptance of the June 18, 2026, SWAN Board Meeting Minutes

Weseloh moved, seconded by Bussey that it be

RESOLVED THAT THE SWAN BOARD ACCEPTS THE JUNE 18, 2026 BOARD MEETING MINUTES

Motion carried by unanimous voice vote

7. **Reports**

a. **Board President Report**

None

b. **Executive Report**

Skog & Bussey discussed the SWAN Budget for 2027. Skog discussed the preliminary FY26 financials. Skog updated the board on activities listed in his report.

c. **Operations Report**

Brandwein updated the board on activities listed in his report.

d. **Treasurers Report**

Previously discussed during Skog's report

e. **Board Calendar**

The board calendar was reviewed. Change to the Regular SWAN Board Meeting on 10/16/26, action item: FY28 budget not FY26.

8. **Action Item** – Cancel the August 14, 2026, SWAN Board Meeting

RESOLVED THAT THE SWAN BOARD ACCEPTS THE CANCELLATION OF THE AUGUST 14, 2026, SWAN BOARD MEETING

Burns moved, seconded by Sheedy that it be

Motion carried by unanimous voice vote.

9. **Discussion Item** – SWAN Quarterly meeting, September 3, 2026, agenda topics

Skog reviewed the Quarterly meeting agenda for September 3, 2026

Musil adjourned the meeting at 11:15 AM.

Minutes Prepared by Ginny Blake

Respectfully Submitted,

Board Secretary

SWAN Executive Director Report

September 18, 2026

Update on activities

Expo 2026 Recap

The revenue and expenses for the 2026 SWAN Expo conference are noted in the table below. For comparison, I have included the 2024 budget for the event held at Moraine Valley Community College, which for that year had a similar use of rooms.

The catering for this year's event at NIU was a hot lunch buffet, but there was a lower cost box lunch option similar to Moraine Valley (just as Moraine Valley could have provided a hot buffet). The 2026 event had 50 presenters in total, which includes 19 SWAN staff. Library presenters are not charged the fee to attend the event. I recommend SWAN consider charging presenters a discounted rate for the 2027 Expo to help boost the revenue.

Overall, the NIU Naperville Conference Center received high marks from attendees, and I recommend SWAN return to the location in 2027 and consider alternating between NIU Naperville and Moraine Valley after next year.

NIU Naperville Conference Center	Cost
Expo 2026: 231 attendees	
Ballroom & 5 rooms	\$ 3,550.00
Breakfast & day package catering	\$ 2,541.00
Lunch catering - hot buffet	\$ 6,930.00
	\$ 13,021.00
Moraine Valley Community College Business & Conference Center	
Expo 2024: 227 attendees	
Ballroom & 4 rooms	\$ 4,260.00
Morning breakfast & box lunch	\$ 7,809.00
	\$ 12,069.00
Cost comparison	\$ 952.00
SWAN revenue	
2026 Expo - invoiced 181 attendees @ \$45	\$ 8,145.00
2024 Expo - invoiced 218 attendees @ \$35	\$ 7,630.00

RAILS Board Consortia Committee

The upcoming Consortia Committee meeting schedule is the following:

Monday, November 9, 2026, at 10:00 am

Monday, February 8, 2027, at 10:00 am

Monday, May 10, 2027, at 10:00 am

ILA Public Policy Committee (PPC) update

I will continue to serve on the PPC as an ex-officio member for the next 12 months. The committee will meet next week for its orientation, with Paul Mills serving as committee chair for the next year.

Illinois eBook legislation is under review with the Senate legal counsel, and the ILA Advocacy subcommittee on eBook legislation is gearing up to solicit library support with Senators. ILA lobbyist is optimistic that the bill will proceed for approval in the Illinois Senate sometime in January 2027.

The Authors Guild and the Association of American Publishers (AAP) commissioned the independent study in connection with ongoing state legislative efforts to mandate prices and restrictions on eBook sales to libraries. This study attempts to shift blame in the eBook market back to libraries.

<https://authorsguild.org/news/study-analyzes-the-impact-of-library-e-lending-on-commercial-book-markets/>

Instead of eBook legislation, the AAP proposes:

- Increased library funding
- Differential pricing for eBook titles
- Tax credits to publishers
- Scrutinize what intermediaries take from the market, e.g., OverDrive

The eBook Study Group, Readers First, Authors Alliance, SPARC, and the Rhode Island Library Association offer a rebuttal to the AAP study and outline the flawed data analysis of the report. The AAP used IMLS public library data on eBook titles available, but due to a lack of understanding on how libraries report eBook titles available within their eBook consortia, the AAP report inflates the amount of eBook titles available. Additionally, the rebuttal pushes back on the AAP claim that library budgets do not allocate enough on collection budgets, as an example of a fundamental misunderstanding of how libraries operate.

<https://ebookstudygroup.substack.com/p/new-joint-statement-dismantling-the>

Projects

ILS & Analytics RFP

I meet at the minimum weekly with the SWAN management team to work on the RFP document and plan for the search process. The draft of the ILS and analytics RFP document will be sent separately to SWAN Board members for feedback at the regular meeting on Friday, September 18, 2026. I recommend reviewing Section 1 “Purpose and Objectives” and seeing if you agree with the objectives listed, as these inform the other sections. Section 11 of the RFP document contains detailed questions about the ILS and analytics solutions, which were created with input from all SWAN staff.

A version of the timeline below is included in the RFP.

Timeline	Activity
September 2026	ILS Search Committee approves final RFP document
October 2026	Issue RFP
October 23, 2026	Letter of Intent deadline
November 13, 2026	Proposer response due
December 18, 2026	SWAN requests clarification of proposals
January 6, 2027	Proposer responses to clarifications due
January 13, 2027	SWAN scoring of proposals & pricing
February 2027	Finalist demonstrations & membership feedback/scoring
March 2027	Request for best & final offer pricing
April 2027	Final scoring & recommendation
May 2027	Contract negotiation
May 2028	SWAN go-live

BLUEcloud priorities

The monthly meeting was held September 2nd with the SWAN staff that are part of the BLUEcloud R&D team. The next meeting is October 7th.

Board considerations

ILS Search Committee approval

The SWAN Board will approve the members of the ILS Search Committee, who will meet in late September for a kickoff meeting and then afterwards will provide feedback on the RFP document. I have included a memo to the board with a recommended slate for the Committee.

SirsiDynix contract extension

SirsiDynix sales representative Stacy Betts provided a contract extension to SWAN. Per the agreement, “The Initial Term shall be extended for an additional 3 years, from May 1, 2026, through April 30, 2029.”

Based on the above RFP timeline, SWAN would have a full year to configure, train, and migrate to a new platform. The advantage of a 3-year agreement is that SWAN would have 2 years as cushion for its project. The downside is that the go-live on a possible new ILS platform could take place late 2028 and SWAN would be contractually obligated to pay SirsiDynix and a possible new vendor.

Period	May 1, 2025 Year-11	May 1, 2026 Year-12	May 1, 2027 Year-13	May 1, 2028 Year-14	May 1, 2029 Year-15
Escalation	6.9%	6.9%		3.9%	3.9%
Total paid	\$390,622.16	\$417,575.10	\$324,475.09	\$337,129.62	\$350,277.67
Difference from prior year	\$32,203.35	\$26,952.94	(\$93,100.01)	\$12,654.53	
Comments		Total paid matches invoice & Schedule A	Discount offered with renewal		

I have included the SirsiDynix renewal agreement for Board discussion at its September 18, 2026 meeting. The discussion should focus on whether to renew for a 3-year agreement or request a 2-year agreement from SirsiDynix.

Strategic Plan document

I have included the version of the strategic plan shared at the September 3rd SWAN Quarterly meeting for SWAN Board feedback. I received direct feedback from former board member Jennifer Cottrill on the document.

SWAN employees have contributed to the plan and have suggestions for revision. I believe it is possible to bring a final version of the plan to the SWAN Board for discussion and approval at the next meeting, October 16, 2026.

Monthly Financial Report

August Balance Sheet

The Fund Balance Unrestricted line for August is \$2,070,405.06 which is unchanged from the month prior. (The June 2026 Unrestricted amount was \$2,200,106.80.) The table below shows the current FY26 budget expense and budgeted spending from reserves.

Fund Balance Unrestricted	\$2,070,405.06
Expenses to be paid from reserve	(\$5,064.00)
	\$2,065,341.06
SWAN annual expense budget	\$3,826,277.00
Number of months operating expense in reserve	6.5

Revenue & Expense Report

This month will be 17% of the budgeted revenue and expenses. SWAN's financials are presented on a cash basis for this current fiscal year 2026. SWAN total expenses for the year are on target at 14% overall. The revenue budget ending August 31, 2026 is above budget due to the first quarter SWAN membership fees being issued in July, and the first quarter RAILS LLSAP grant payment was received.

	FY27 Budget	Ending August 2026	Percentage of budget YTD 17%
Total Revenue	\$3,826,277.00	\$919,299.76	24%
Total Expenses	\$3,826,277.00	\$527,218.47	14%
Over / (Under)	\$0.00	\$392,081.29	

Accounts Receivable

5460 – Information Subscription Service: 99.78%

ProQuest Syndetic Solutions subscription is paid for the full year.

5470—Subscription Support Services: 101.22%

The SWAN support ticketing system's annual subscription to Halo ITSM was paid in full in July.

Operations Report: July-Aug. 2026

Summary

Statistics are reported through the month-end of August 2026. Membership engagement activities and system outages will be reported as of final assembly of the report (September 18th) to ensure that any critical system issues are documented as quickly as possible and other information is presented as timely as possible.

Member Engagement

A recap of member engagement activities in the report's time period.

Site Visits, Training, and Consultation

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

Date	Event Name	Teams Responsible	Category
7/23/2026	Discovery and User Experience Working Group	User Experience	Membership Meeting
7/28/2026	SWAN Fireside Chat	All	Membership Meeting
7/30/2026	IPLAR Office Hours	Administration; Information Technology & System Support	Consultation
8/21/2026	SWAN Expo	All	Membership Meeting
8/25/2026	SWAN Fireside Chat	All	Membership Meeting
8/27/2026	Acquisitions Consultation (INS)	Bibliographic Services	Consultation
8/27/2026	Firewall Consultation/Replacement (PFS)	Information Technology & System Support	Consultation
9/3/2026	SWAN Quarterly Meeting	All	Membership Meeting
9/8/2026	Aspen Networking	User Experience	Membership Meeting
9/10/2026	Acquisitions & Cataloging Networking	Bibliographic Services	Membership Meeting

User Groups and Engagement Events

Cataloging Working Group (7/09/2026)

The Cataloging Working Group meeting included updates from the Cataloging Maintenance Center (CMC), Backstage catalog cleanup, and discussions about standardizing cataloging practices. Dr. Pamela Thomas presented CMC's free services including cataloging of Illinois authors, history, and genealogy materials, along with database cleanup projects for various consortia and metadata consulting services. Cynthia gave an update on the bi-annual Backstage load and Rebuilds that

followed. The group discussed challenges with cataloging WhaZoodles, a new media format that combines audio and content, and debated whether to use specific brand names or more general terms. The conversation ended with discussions about improving communication between SWAN Bibliographic Services and Cataloging Libraries, including the possibility of reviving a quarterly newsletter and conducting surveys to better understand cataloging needs across all SWAN libraries.

Discovery & User Experience Working (7/23/2026)

The DUX group discussed some recent developments in Aspen, including the ability to display Accelerated Reader values more prominently and the ability to place copy-level holds. The group opted not to configure either of scenarios. In addition, the group reviewed mockups of potential changes to the My Account area of the catalog and potential usability testing tasks.

Aspen Networking (9/8/2026)

Topics discussed in Aspen networking included recent enhancement requests from patrons, a demo of scan-and-go self-check functionality in the app, and a discussion of list groups.

Acquisitions & Cataloging Networking (9/10/2026)

The Acquisitions and Cataloging Networking Group met on 9/10 and discussed a variety of topics including how to track open orders and provide stats to the board/admin, how to process Yoto packs, and how to handle automatic de-newing at the library level. SWAN provided updates on a new Acquisitions course and improved efficiency for biborderload repots. SWAN also discussed 89x local series pages with the help of Jenny Cuevas, ADD, MARC Holdings display in Aspen, and put out a call for pilot libraries to help with the "report an issue" button in Aspen.

Major Projects & Research

BLUEcloud Analytics Private Intelligence Server rollout

The single log-in requirement for BLUEcloud Analytics discussed last month has not posed any problems for SWAN or member staff, so we are electing to continue with our current configuration for the time being. Nevertheless, SirsiDynix has offered to provide support should we need to move to a single-use login model in the future.

We have instead been focusing on learning all we can about user permissions with the goal of unifying all user permissions across the consortium and activating possible permissions that would be useful to member staff that they have not had. These amount to quality-of-life improvements such as formatting report fields, but our primary goal is to smooth out discrepancies between library permissions that have existed for many years due to our inability to see these configurations in the old system.

Aspen Discovery

26.07 and 26.08 releases

The 26.08 release of Aspen included major backend updates to the app, including much faster load times opening the app. The 26.07 update added an optional full-width theme, which will improve the display of the catalog on large screens including OPAC computers.

Phone number editing

Patrons can now edit their phone numbers in the catalog. Tara Wood developed this functionality based on feedback from the Circulation Networking group.

Upcoming usability testing

The Discovery and User Experience Working Group has a year-long project to identify improvements to the My Account area of the catalog. On September 10th, we will conduct usability testing with patrons at Roselle Public Library with DUX member Lisa Viezbicke on the current My Account functionality and wireframes for changes developed with DUX.

Scan-and-go

The 26.08 release included fixes for handling items in transit and checking out titles when a title is available for pickup from the holds shelf. We are awaiting updates in the next release to handle items checked out to display users and exceptions to check out multiple volumes of a multivolume title. Following these fixes, the pilot group will resume testing and evaluate if the scan-and-go functionality is ready to go live to patrons.

Palace Project web interface integration

The Palace Project now has a web interface; it was previously only accessible through the Palace app. Olivia Montolin is working to update the Aspen catalog to link out to the web interface links for each library.

Bi-annual Backstage update

Cynthia Romanowski completed the bi-annual Backstage bibliographic data extraction for the enhancement of existing records. We sent over 1.3 million records to Backstage for enhancement and received 66,184 updated records and corresponding 9,234 update/new authority records. The result of the larger load of data requires SWAN to run Rebuilds to ensure that they are properly indexed. Rebuilds were performed for authority records over the Labor Day weekend.

Subject headings update

SWAN Bibliographic Services have been updating picture books formats have been moved to the 655 tag and work as begun on Toys and movable books. Work is continuing to be performed on non-English language materials, ensuring that they are following the 655 4 standard. Next headings to be fixed are the Lift-the-flap books to be changed into the more appropriate genre headings. Additionally, Lucas McKeever worked on updating the Manga materials with the appropriate genre

heading of Manga, ensuring that we are taking advantage of a new filter in Aspen. This has significantly increased the number of these items within our catalog.

Security & infrastructure

We are continuing to research and implement replacement services for our SWANcom mailing list as well as our library alias emails. Our initial plan to route these through SendGrid using a Microsoft connector was a non-starter and SendGrid's support team simply did not understand what we were trying to accomplish. This, along with the delivery issues we've experienced with SendGrid over the past few months, has forced us to look at options to eliminate SendGrid entirely.

Microsoft recently launched Azure Communication Services (ACS), which offers not only email delivery, but SMS and other modern communication methods. After some investigation, this appears to be our best way forward and once the initial goal of SWANcom and aliases have been achieved, ACS could also handle our Symphony traffic, allowing us to no longer rely on SendGrid as our bulk email service.

In the meantime, Lexii has successfully upgraded the operating system on both the servers currently supporting these services, ensuring that they receive all necessary security patches and updates. This was no small feat, considering the age of some of the components and their "vintage" architecture.

External Collaboration & Partnerships

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

Date	Event Name	Teams Involved	Topic
7/22/2026	SirsiDynix SureSailing	All	Partnerships
8/6/2026	Aspen Inside Scoop	All	Partnerships
8/13/2026	Aspen Community Meeting	All	Partnerships
8/20/2026	Aspen Catalogers Meeting	Bibliographic Services	Partnerships
8/26/2026	SirsiDynix SureSailing	All	Partnerships
8/27/2026	Springshare Patron Point Quarterly Check-in	Administration; Information Technology & System Support; User Experience	Partnerships
9/3/2026	Aspen Inside Scoop	All	Partnerships
9/10/2026	Aspen Community Meeting	All	Partnerships

Support, Documentation, and Training

Details on support tickets, documentation, and training.

Outage Tracking

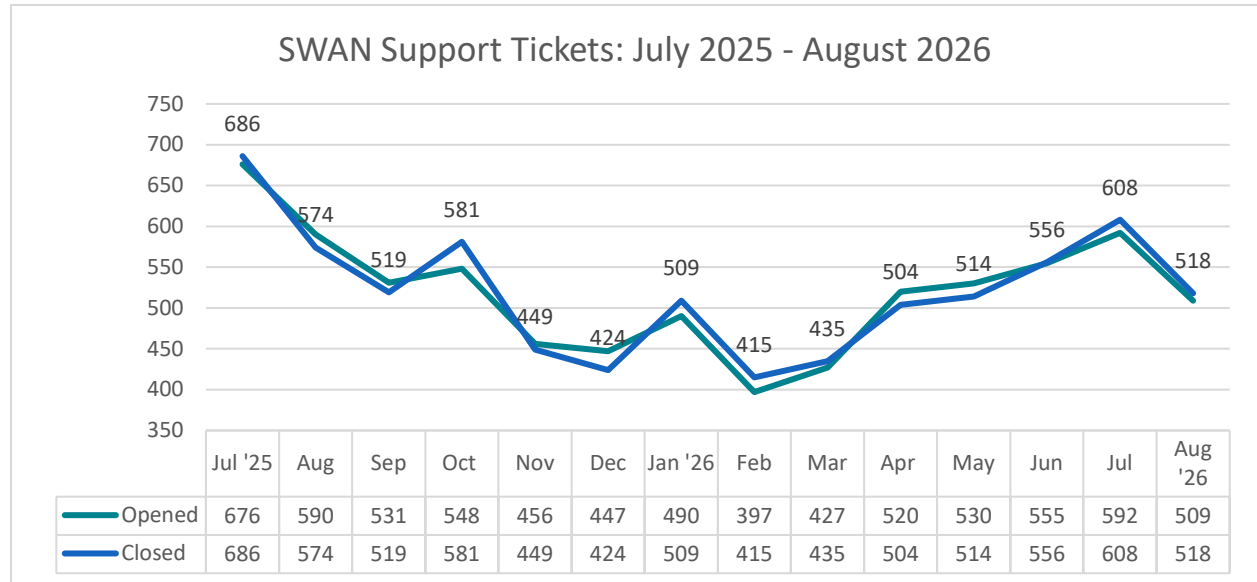
During the last weekend of August, SendGrid placed another hold on our account due to “unauthorized activity”. We hope to have SendGrid replaced as a vendor soon.

System Maintenance & Outage Calendar

Incident	Date	Details
Aspen LiDA slow/unresponsive	6/3/2026	Grove detected several IP addresses generating a significant amount of traffic, impacting site performance. IPs blocked by Grove support.
Delayed Symphony Reports	6/12/2026	EDI report hung during processing, delaying regularly scheduled morning reports
Aspen LiDA slow/unresponsive	6/16/2026	Similar in scope to the incident earlier in the month.
Delayed Symphony Reports	6/15/2026	EDI report hung during processing, delaying regularly scheduled morning reports
Overnight Processing Finished Abnormally	6/18/2026	ADUText concluded abnormally.
EDI Reports Delaying Symphony reports	Ongoing	EDI reports are still having some difficulty due to a change Ingram made with their authentication. We have implemented a report timeout to prevent these from hanging the report server.
WorkFlows producing "Heading not found" errors	7/22/2026	SirsiDynix corrected impacted records. Overnight processing resolved issues.
Volume selection not appearing in Aspen	7/27/2026	Symphony failed to send full volume export overnight. Was resolved by running export again.
Long running overnight processing reports	8/4/2026	Symphony reports delayed overnight. Report schedule caught up by late morning.
High load issues in Aspen	8/18/2026	AI bots have been spiking load on Aspen server.
SendGrid Service Disruption	8/29-9/1/2026	We experienced another SendGrid outage. Despite quickly addressing Twilio support's concerns, restoration took some time.

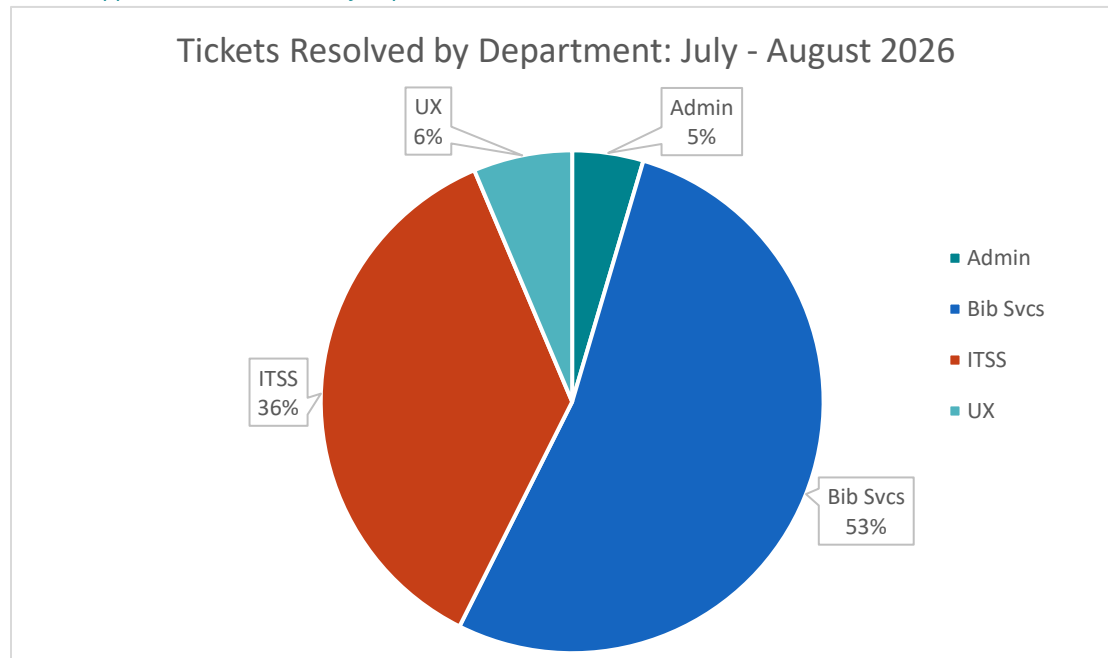
Support Tickets

SWAN Support Tickets Opened/Closed in Past 12 Months



Data labels reflect tickets closed each month.

SWAN Support Tickets Resolved by Department



Support Site

New and updated documentation

Newly added documentation includes:

- [Manual Export of Reports](#) (Ahren Sievers)
- [External Resources for Cataloging Libraries](#) (Lucas McKeever)

Training Modules & Recordings

Webinar project

Throughout the next year, Crystal Vela is leading a project with SWAN staff to re-record and refresh our webinars.

Webinars completed last month were:

- Aspen Admin Training: Spotlights (Tara Wood)

Current in-progress webinars are:

- Generic Users: When and How to User (Vickie Totton)
- Aspen All-Staff: Using WorkFlows and Aspen to Assist Patrons (Tara Wood)
- Aspen All Staff: Accounts and Recommendations (Crystal Vela)

Online courses

Recently completed online courses are:

- TS400: Symphony Acquisitions Funds and Vendors - update (Sam Dietel)
- TS403: Receiving and Invoicing (Sam Dietel)

Current in-progress interactive online courses are:

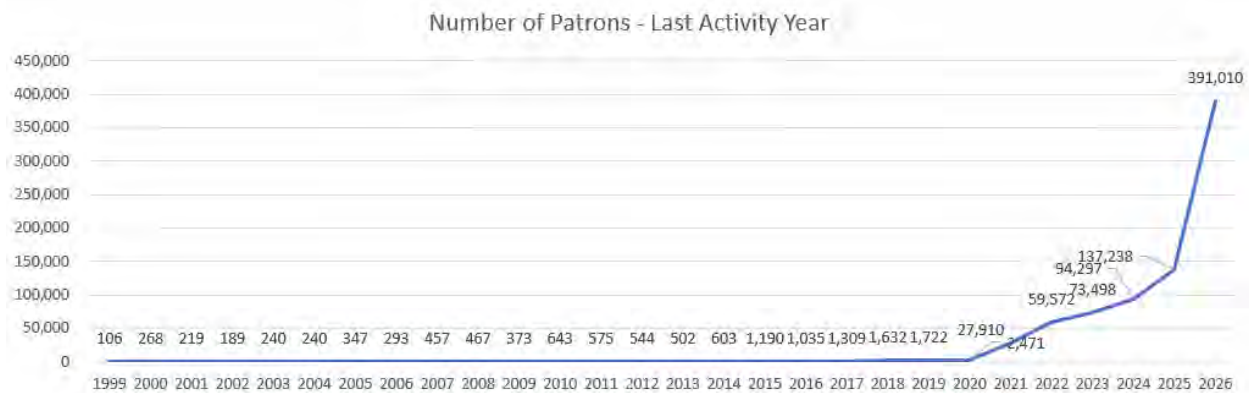
- CS101: Item Types, Item Categories, and Locations (Crystal Vela)
- TS404: Rollover (Sam Dietel)

45 new users were created in our online learning management system in July and August.

Maintenance

Automatic Monthly Patron Record Removal

In July, we removed 15,949 inactive patrons from the database, and in August we removed 15,069. We currently have 798,950 registered patrons in the database. Now that the patron record purge has reached the goal of >5 years of inactivity, only 2% (15,425) have been inactive since before 2021 and remain due to bills greater than \$100 on their account.



We encourage libraries to examine these bills for possible removal at the library's discretion. Patrons accounts older than 5 years old rarely see activity.

MessageBee Statistics

Segment/Month	Sent	Delivered	Failed	Success Rate	OptOut	Opens	Clicks
Email							
Jan-26	192,045	189,160	1,465	98.50%	591	146,811	5,562
Feb-26	154,139	152,424	1,142	98.89%	541	118,308	4,429
Mar-26	175,068	173,196	1,206	98.93%	617	134,654	4,719
Apr-26	161,470	159,637	1,258	98.86%	545	124,252	4,370
May-26	167,804	165,729	1,329	98.76%	626	127,721	4,719
26-Jun	178,821	176,750	1,456	98.84%	604	136,867	4,828
Jul-26	186,386	184,104	1,571	98.78%	688	141,248	5,246
Aug-26	187,729	185,246	1,724	98.68%	686	143,491	4,938

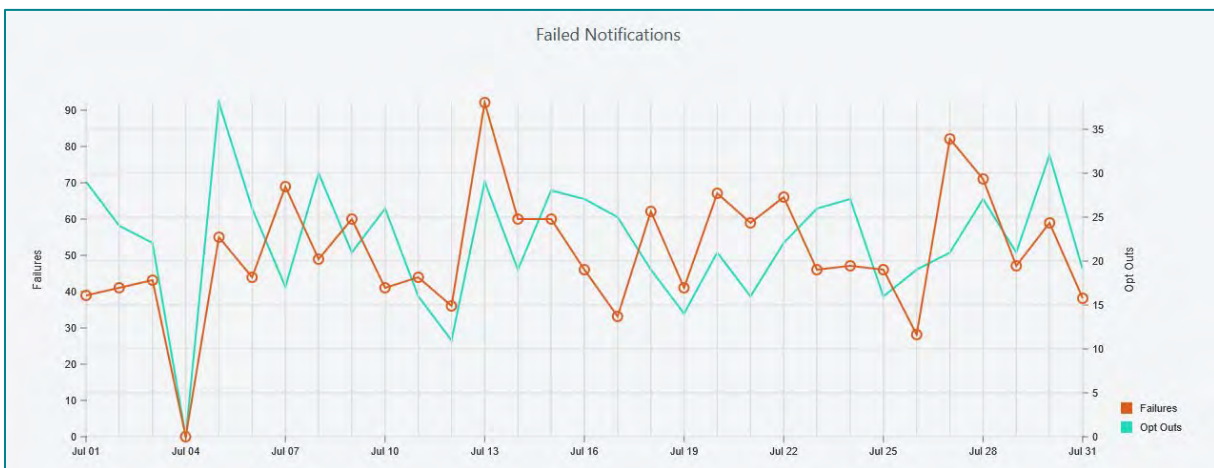
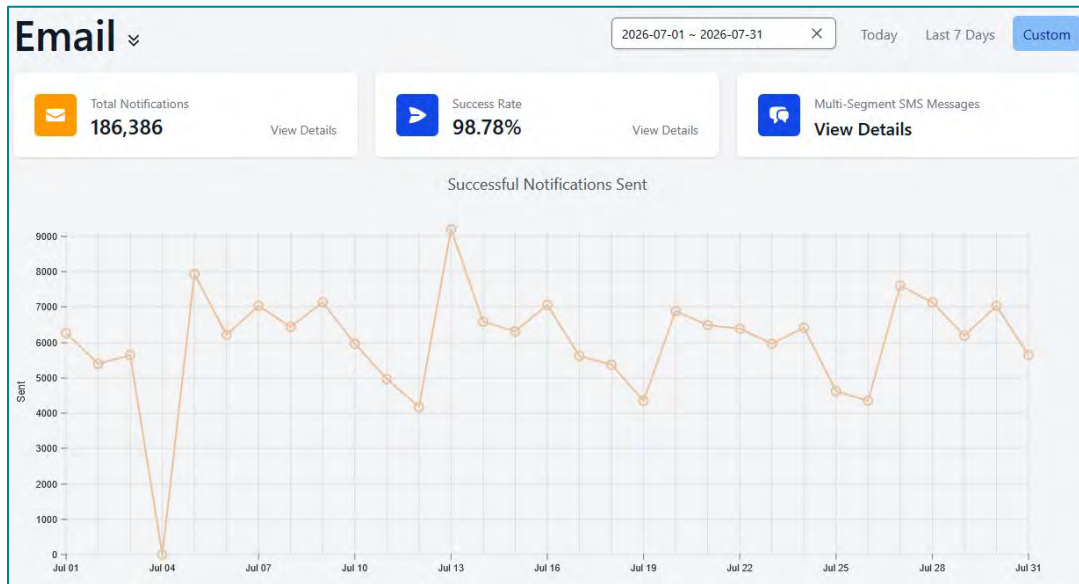
SMS							
Jan-26	72,132	70,793	979	98.14%	93	N/A	N/A
Feb-26	58,194	57,295	762	98.46%	70	N/A	N/A
Mar-26	68,411	67,402	895	98.53%	89	N/A	N/A
Apr-26	64,947	63,948	892	98.46%	95	N/A	N/A
May-26	63,047	62,051	836	98.42%	111	N/A	N/A
Jun-26	70,177	69,042	1,011	98.38%	120	N/A	N/A
Jul-26	71,612	70,415	1,058	98.33%	114	N/A	N/A
Aug-26	72,816	71,434	1,260	98.10%	100	N/A	N/A

Voice							
Jan-26	7,291	6,995	236	95.94%	N/A	N/A	N/A
Feb-26	5,847	5,665	161	96.89%	N/A	N/A	N/A
Mar-26	6,483	6,276	189	96.81%	N/A	N/A	N/A
Apr-26	6,163	5,983	171	97.08%	N/A	N/A	N/A
May-26	5,657	5,414	233	95.70%	N/A	N/A	N/A

Jun-26	6,571	6,313	242	96.07%	N/A	N/A	N/A
Jul-26	6,829	6,533	247	95.67%	N/A	N/A	N/A
Aug-26	6,514	6,226	266	95.58%	N/A	N/A	N/A

Email Notices

July 2026



August 2026

Email

2026-08-01 ~ 2026-08-31

Today

Last 7 Days

Custom



Total Notifications

187,729

[View Details](#)



Success Rate

98.68%

[View Details](#)



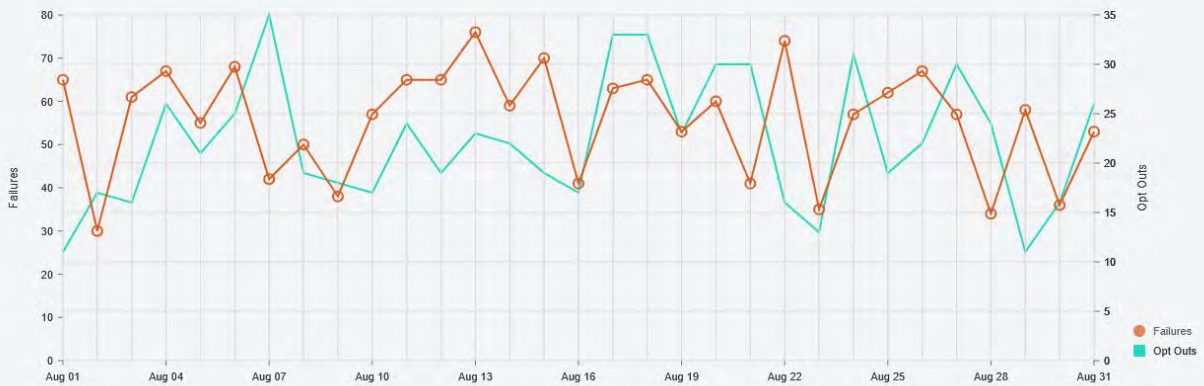
Multi-Segment SMS Messages

[View Details](#)

Successful Notifications Sent

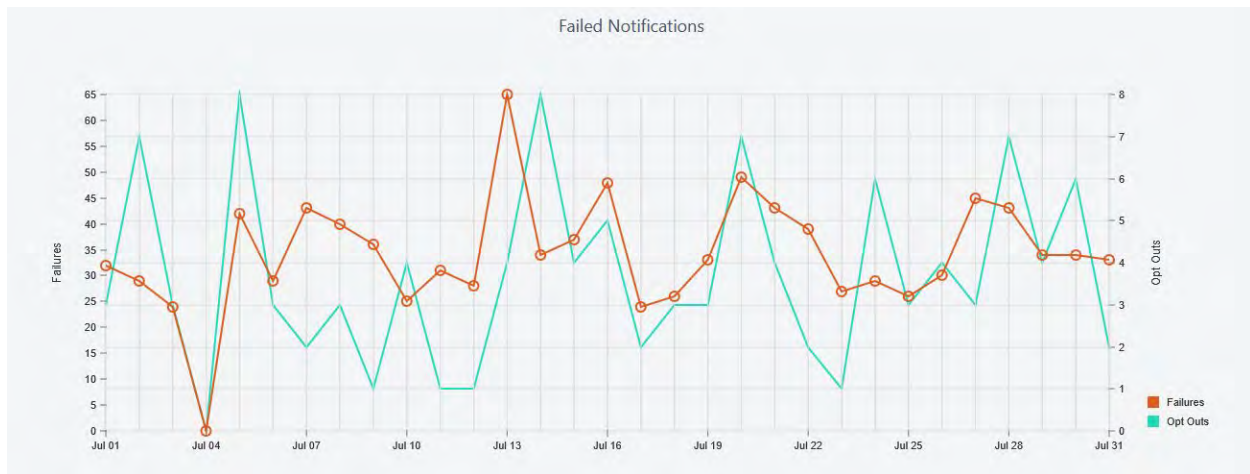
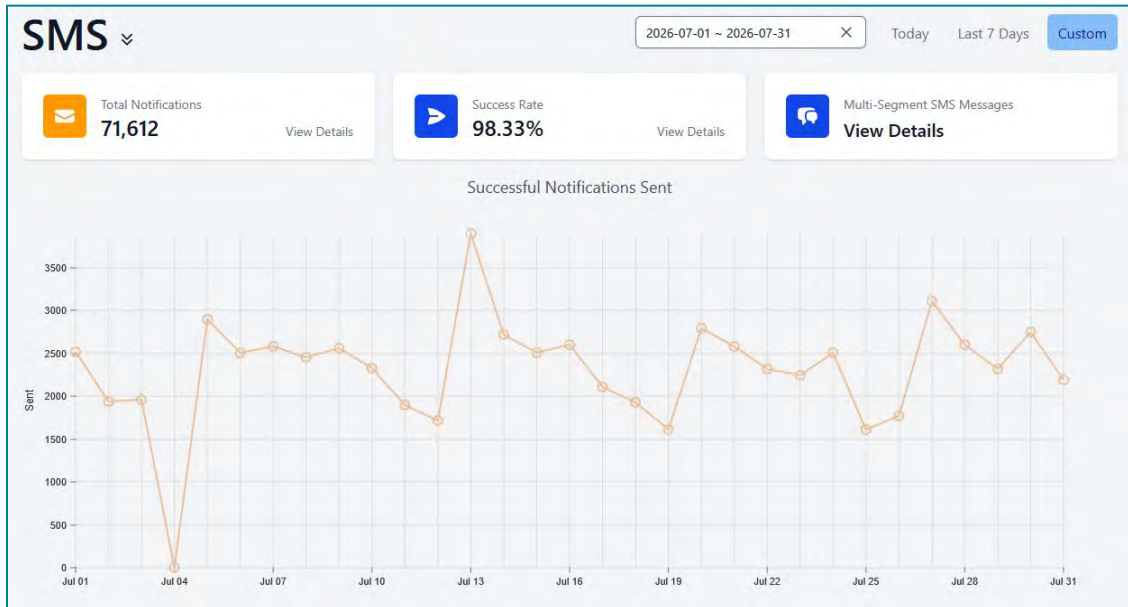


Failed Notifications



SMS Notices

July 2026

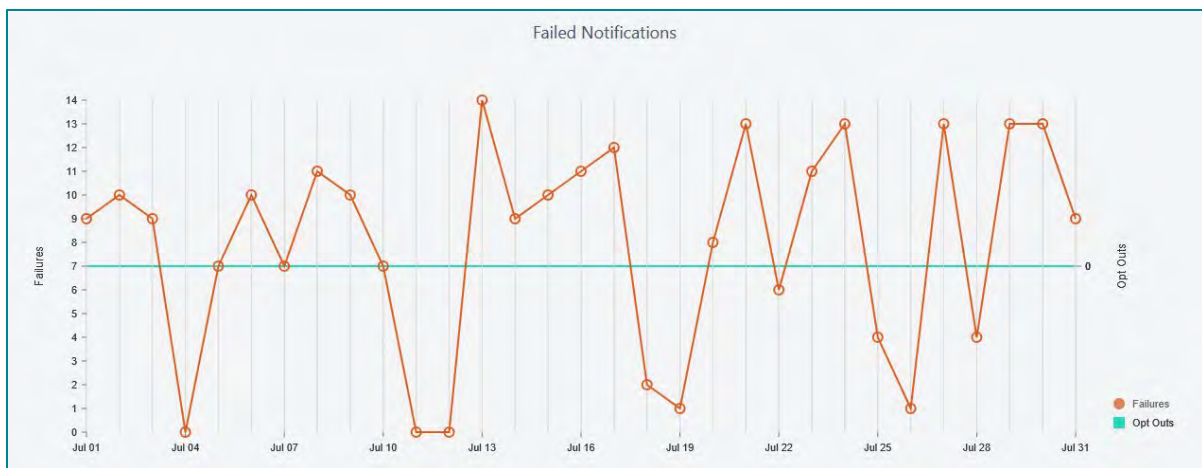
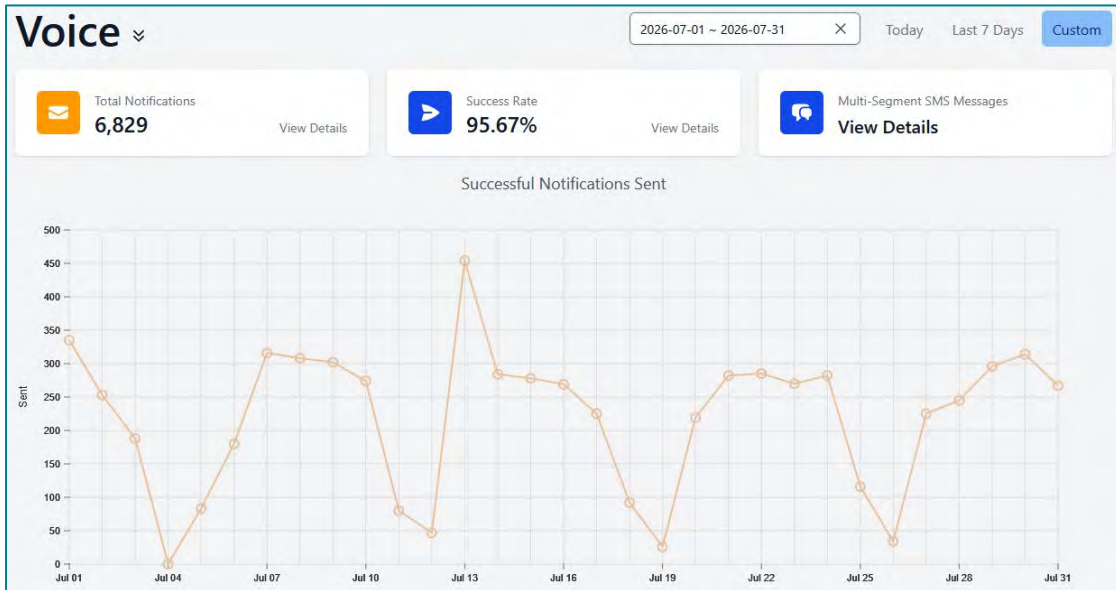


August 2026



Voice Notices

July 2026



August 2026

Voice

2026-08-01 ~ 2026-08-31

Today

Last 7 Days

Custom



Total Notifications
6,514

[View Details](#)



Success Rate
95.58%

[View Details](#)

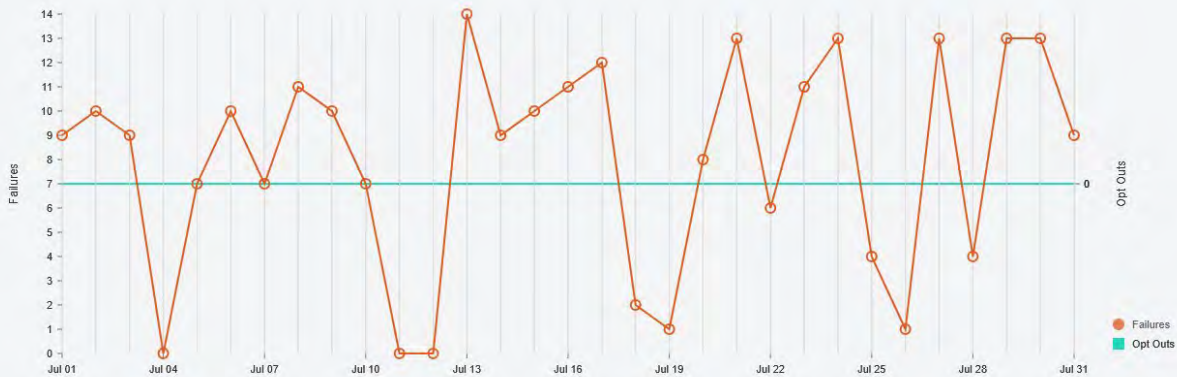


Multi-Segment SMS Messages
View Details

Successful Notifications Sent



Failed Notifications



Print Notices

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

Month/Yr	Bill Notices	Amount
December, 2025	530	\$ 514.10
January, 2026	487	\$ 472.39
February, 2026	407	\$ 394.79
March, 2026	322	\$ 312.34
April, 2026	318	\$ 308.46
May, 2026	344	\$ 333.68
June, 2026	403	\$ 390.91
July, 2026	353	\$ 351.37

August, 2026

351

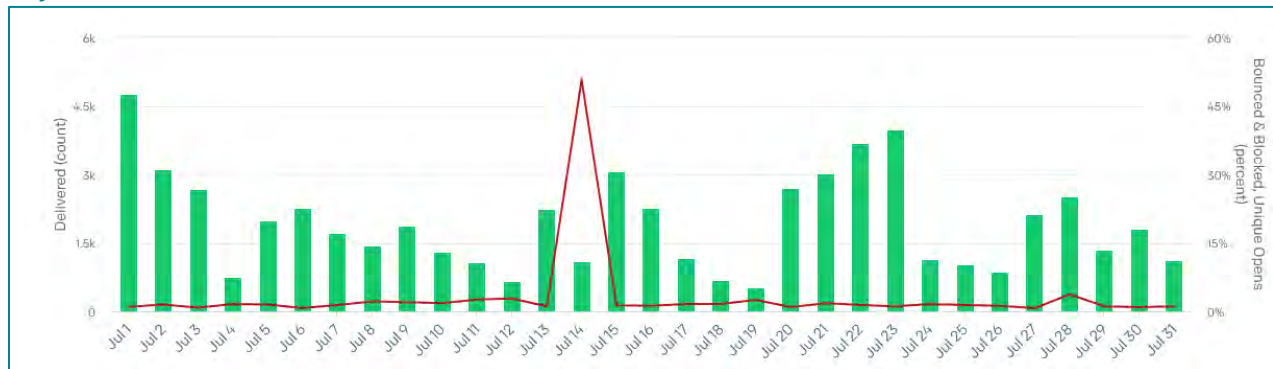
\$ 354.51

SendGrid Statistics

SendGrid processes email originating from Symphony, SWANcom, and other official communications.

Month/Yr	Total Requests	Total Processed	Success Rate (Delivered)	Addresses		Messages			
				Bounced	Marked as Spam	Invalid	Blocks	Bounce Drops	Spam Drops
Jul '25	77,571	73,990	99.1% (73,324)	186	4	38	583	3,306	237
Aug	67,299	62,996	99.5% (62,668)	184	1	1,054	248	3,026	223
Sep	63,875	60,385	99.27% (59,947)	212	3	36	320	3,202	252
Oct	64,281	60,557	99.54% (60,276)	146	4	27	362	3,453	244
Nov	56,617	53,594	93.03% (52,672)	100	1	34	929	2,793	196
Dec	52,521	49,720	99.52% (49,481)	102	0	47	237	2,571	183
Jan '26	54,898	52,190	99.45% (51,906)	154	3	37	224	2,463	208
Feb	49,080	46,996	99.35% (46,651)	231	2	29	218	1,888	167
Mar	55,348	53,854	99.28% (53,465)	199	2	34	253	1,256	204
Apr	63,051	61,256	98.06% (60,070)	200	3	24	1,158	1,595	176
May	73,871	71,439	84.34% (60,254)	227	9	30	11,124	2,210	192
Jun	69,697	67,478	99.06% (66,842)	273	8	35	535	2,015	169
Jul	68,693	61,737	97.23% (60,025)	308	5	5,033	1,667	1,738	185
Aug '26	65,885	52,296	94.46% (52,296)	191	4	8,973	3,092	1,370	182

July 2026



Aug 2026



Appendix: Statistics

Cataloging & Collections

Cataloging statistics highlight the shared bibliographic database of physical materials maintained by our SWAN libraries and SWAN centralized cataloging staff.

OCLC Cataloging Counts

Counts do not include seventeen cataloging libraries. Original cataloging counts are new records created for SWAN and added to the OCLC WorldCat database. Copy cataloging counts are records downloaded from OCLC and added to SWAN's bibliographic database.

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total
Orig 2023	114	123	187	197	164	146	57	38	34	104	111	40	1,315
Copy 2023	2,925	2,213	2,352	1,819	2,630	2,310	1,752	2,215	1,875	2,338	1,968	1,838	26,235
Orig 2024	134	149	127	132	125	80	129	63	99	80	80	73	1,271
Copy 2024	2,072	1,936	1,633	1,967	1,727	1,630	1,658	1,293	1,652	2,030	2,002	2,107	21,707
Orig 2025	116	96	145	131	137	52	32	59	122	64	121	58	1,133
Copy 2025	2376	2147	1832	2029	1720	1504	1790	1765	1674	1862	1551	1543	21,793
Orig 2026	58	68	65	159	217	210	144	159					
Copy 2026	1830	1766	2080	1372	1364	1770	1839	1705					

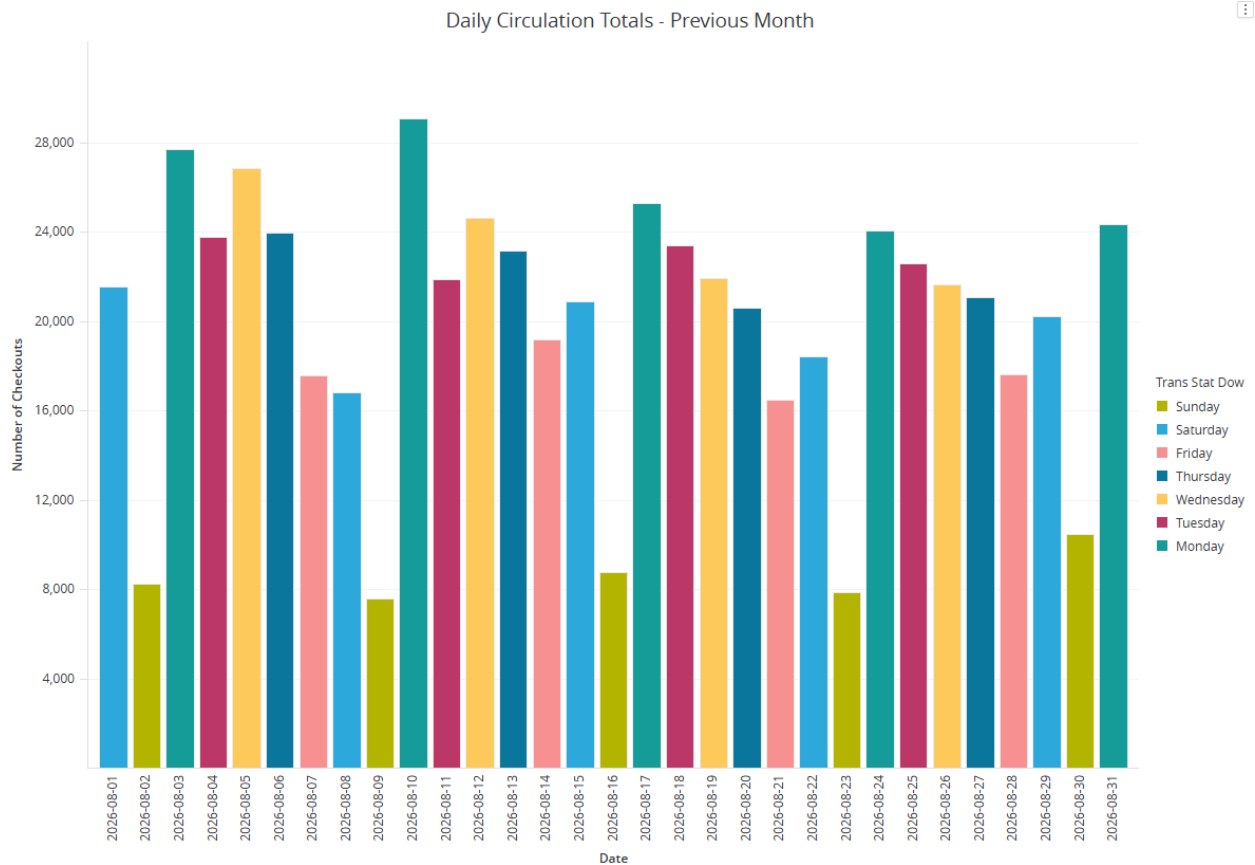
Records Added

In July and August, SWAN libraries added 46,513 and 40,866 new items to the database, and a total of 6,584 and 6,094 new catalog records.

Currently, we have 1,380,552 unique bibliographic records with available items. Of these, 56% were published in or after 2010.

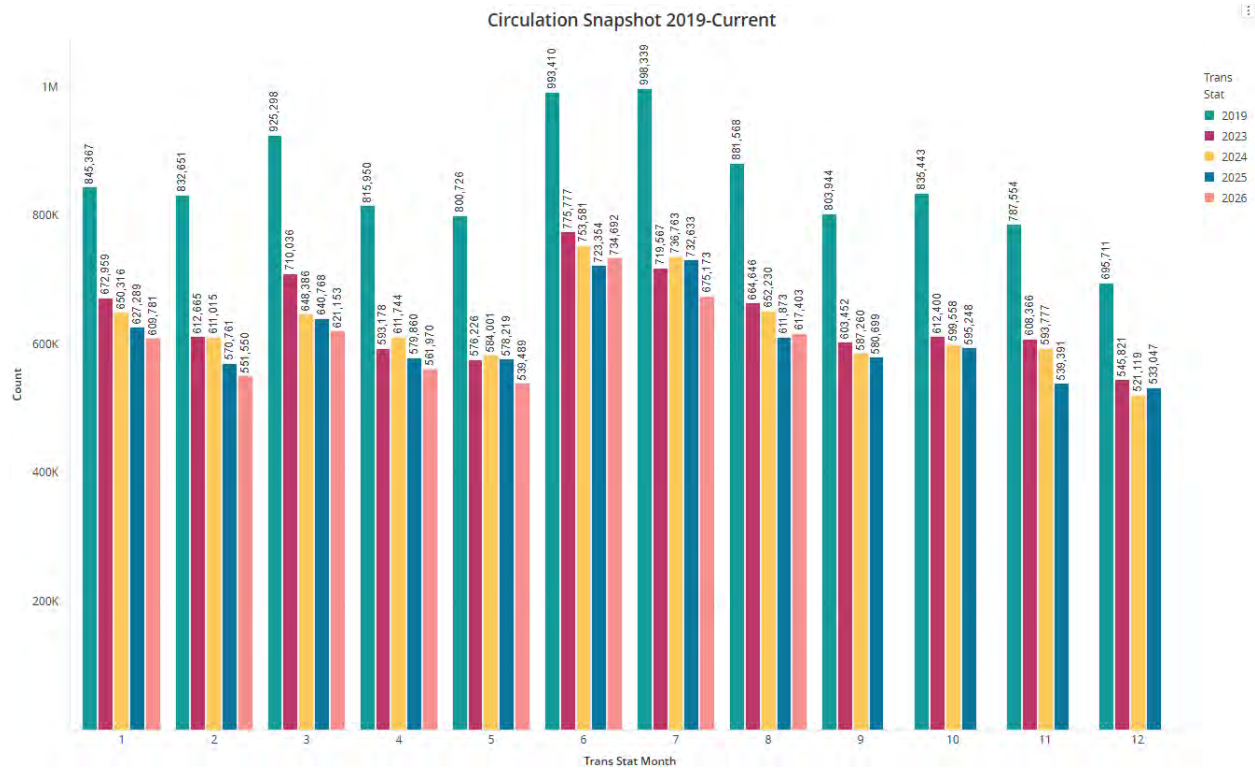
Circulation

In July there were 675,173 total circulations across all SWAN libraries, and in August there were 617,403. Daily totals for August are in the chart below



Monthly total comparison since 2019

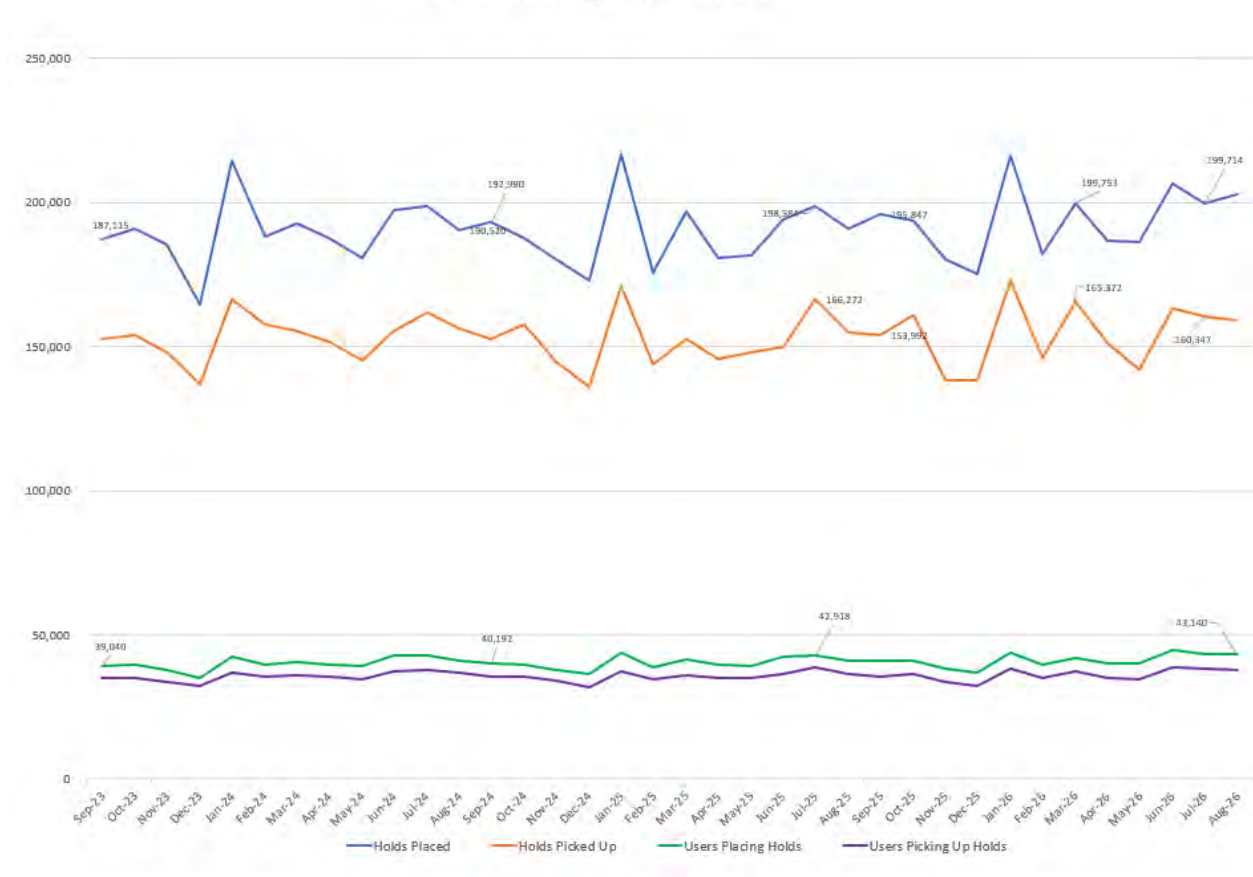
Systemwide physical circulation in July was 92.2% of the total in July 2025, and in August it was 101%. The counts are 68-70% of the pre-pandemic counts from June 2019.



Trends in Holds

In July, 199,714 holds were placed by 43,421 unique patrons, and in August the counts were 202,649 by 43,140 unique patrons for an average of 4.6 items per holding patron. Of these, 319,238 were ultimately circulated, or about 79%. Hold placements/pickup remains steady in recent years, even as physical circulation tapers.

Trends in Holds, Sept. 2023 - Present



Interlibrary Loan & Resource Sharing

In August, Interlibrary loan checkouts between SWAN members totaled 112,343 for 18% of total checkouts.

Reciprocal borrowing between SWAN libraries totaled another 16.9% of total checkouts at 103,293. Non-SWAN reciprocal borrowing made up another 3.5% of checkouts.

OCLC Worldwide Resource Sharing

In July and August, our combined OCLC interlibrary loan statistics show that SWAN was still a net lender by a ratio of 2 items lent for each item borrowed. We lent 5,024 items and 48 copies and borrowed 2,427 items and 34 copies.

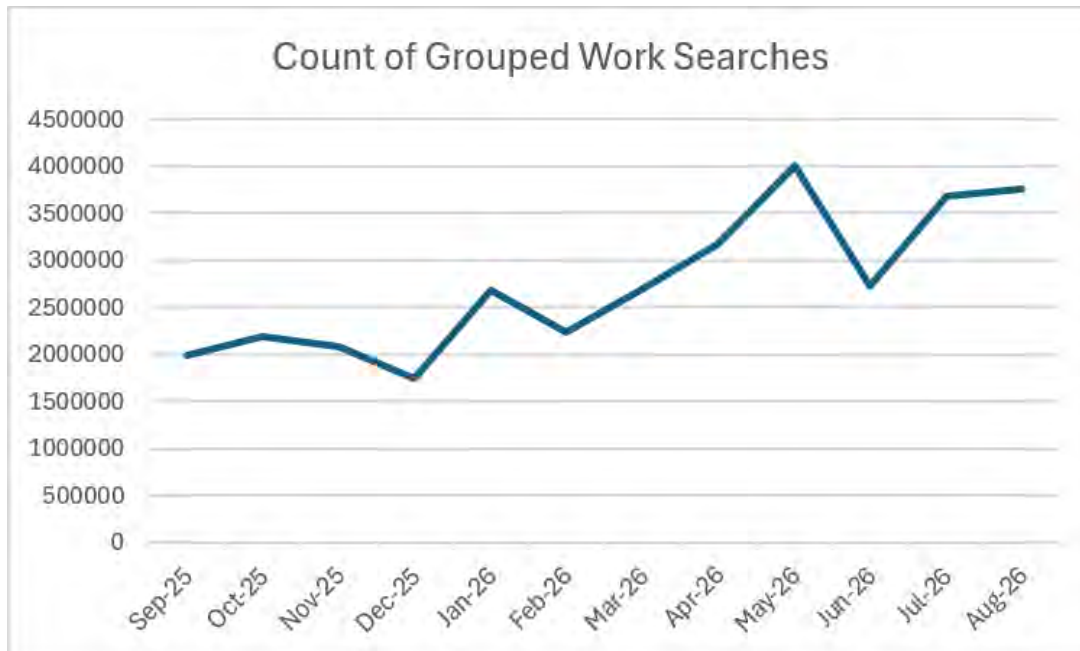
Online Public Catalog – Aspen

Note: We're investigating alternatives to Google Analytics for statistics. This month's statistics only show search term data from Google Analytics. We are continuing to update the [Patron Use Report](#) until the future of our catalog statistics is finalized.

Top 25 Searches in Aspen (July & August 2026)

- | | | |
|----------------------|--------------------------|--------------------|
| 1. calamity club | 10. minecraft | 19. kin |
| 2. yesteryear | 11. school | 20. shampoo effect |
| 3. theo of golden | 12. dungeon crawler carl | 21. who would win |
| 4. odyssey | 13. the correspondent | 22. strangers |
| 5. mad mabel | 14. dolly parton | 23. i survived |
| 6. pokemon | 15. regime change | 24. spiderman |
| 7. whistler | 16. games | 25. summer |
| 8. freida mcfadden | 17. hotspot | |
| 9. project hail mary | 18. romance | |

Grouped work searches in Aspen



SWAN Libraries + App – Aspen LiDA



SWAN
Calendar-Timetable of Deadlines and Board Action Requirements

DATE	MEETING TYPE	ACTION ITEMS
Friday, July 17, 2026	Regular SWAN Board Meeting	Elect Officers: President, VP, Treasurer, Secretary & Complete Signature Card Changes for Bank Accounts. OMA Officers must complete training. Nominate for committees.
Friday, August 14, 2026	Regular SWAN Board Meeting	Meeting often conflicts with SWAN Expo. Decision on recommend to cancel meeting.
Thursday, September 3, 2026	SWAN Quarterly Meeting	Introduce new SWAN Board members
Friday, September 18, 2026	Regular SWAN Board Meeting	Closed session minutes 6 month review Identify SWAN policies to review. Review budget process timetable with SWAN Board.
Friday, October 16, 2026	Regular SWAN Board Meeting	Aaron begins work on budget, brings questions to SWAN Board if needed.
Friday, November 20, 2026	Regular SWAN Board Meeting	Aaron to bring next SWAN budget draft; Board discuss Fees and determines next steps. Board approves meeting dates for upcoming calendar. Make decision on membership platform satisfaction survey.
Thursday, December 3, 2026	SWAN Quarterly Meeting	
Friday, December 18, 2026	Regular SWAN Board Meeting	Review of SWAN Budget Draft
Friday, January 15, 2027	Regular SWAN Board Meeting	Board accepts financial audit. Review and recommend draft of SWAN Budget for Membership presentation. Set COW date for February for membership review.
Tuesday, February 2, 2027	Committee of the Whole meeting (virtual)	Meeting to discuss FY26 budget, fees, and reserves worksheet.
Friday, February 19, 2027	Regular SWAN Board Meeting	Incorporate changes, suggestions to SWAN budget. Create recommendation to membership. SWAN Board Election Process Review.
Thursday, March 4, 2027	SWAN Quarterly Meeting	Roll call vote to approve SWAN budget. Announce Board election process.
Friday, March 19, 2027	Regular SWAN Board Meeting	Strategic planning retreat
Friday, April 16, 2027	Regular SWAN Board Meeting	Review and approve Board Self Evaluation Form; assign date for completion. Compile questions for SirsiDynix.
Friday, May 21, 2027	Regular SWAN Board Meeting	Review Board Self-Evaluation Results.
Thursday, June 3, 2027	SWAN Quarterly Meeting	Board Election Results. Vote on Bylaw amendments (if any).
Friday, June 18, 2027	Regular SWAN Board Meeting	Review/Write Off Allowance for Doubtful Accounts. Director Evaluation - Provide results and discuss (Executive Session). Approve schedule for regular board meetings for next 12 months.

SWAN Board & Membership Meeting Schedule 2026 - 2027

Date	Meeting type	Location
Friday, January 23, 2026	Regular SWAN Board Meeting	Itasca Community Library
Friday, February 20, 2026	Regular SWAN Board Meeting	Itasca Community Library
Friday, March 20, 2026	Regular SWAN Board Meeting	Glen Ellyn Public Library
Friday, April 17, 2026	Regular SWAN Board Meeting	Roselle Public Library
Friday, May 22, 2026	Regular SWAN Board Meeting	Richton Park Public Library
Thursday, June 18, 2026	Regular SWAN Board Meeting	Richton Park Public Library
Friday, July 17, 2026	Regular SWAN Board Meeting	Glen Ellyn Public Library
Friday, August 14, 2026	Regular SWAN Board Meeting	Glen Ellyn Public Library
Friday, September 18, 2026	Regular SWAN Board Meeting	Tinley Park Public Library
Friday, October 16, 2026	Regular SWAN Board Meeting	Tinley Park Public Library
Friday, November 20, 2026	Regular SWAN Board Meeting	West Chicago Public Library
Friday, December 18, 2026	Regular SWAN Board Meeting	West Chicago Public Library
Friday, January 15, 2027	Regular SWAN Board Meeting	Itasca Community Library
Friday, February 19, 2027	Regular SWAN Board Meeting	Itasca Community Library
Friday, March 19, 2027	Regular SWAN Board Meeting	Berwyn Public Library
Friday, April 16, 2027	Regular SWAN Board Meeting	Berwyn Public Library
Friday, May 21, 2027	Regular SWAN Board Meeting	St Charles Public Library District
Friday, June 18, 2027	Regular SWAN Board Meeting	St Charles Public Library District

Date: September 18, 2026
To: SWAN Board
From: Aaron Skog, Executive Director
Re: ILS & Analytics Search Committee



The self-nomination statements were reviewed by the SWAN management team with SWAN staff feedback, and I recommend the following to the 10-member ILS & Analytics Search Committee.

1. Allyson Renell, Director, Carol Stream Public Library
2. Brittany Smith, Technical Services Manager, Saint Charles Public Library District
3. Brooke Sievers, Assistant Director Addison Public Library & Forest Park Public Library
Trustee
4. Hubbell Hinkhouse, Circulation Supervisor, Oak Brook Public Library
5. Melissa Willer, Circulation Services Manager, Downers Grove Public Library
6. Aaron Skog, SWAN Executive Director
7. Cynthia Romanowski, SWAN Bibliographic Services Manager
8. Ian Nosek, SWAN IT & System Support Manager
9. Scott Brandwein, SWAN Assistant Director
10. Tara Wood, SWAN User Experience Manager

The statements from the 24 self-nominations are included in your September 18, 2026, Board meeting packet.

ILS Search Committee self-nomination

Name	Allyson Renell
Library	Carol Stream Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I am the new director at the Carol Stream Public Library and I am very interested in the search. Up until this past July (2026) I worked at the Downers Grove Public Library for 10 years managing the children's department. I have the advantage of seeing the ILS from two different perspectives; that of a mid-size library and of a large library. Additionally both DGS and CSD are cataloging libraries so I can provide some perspective about. My recent children's background also bring perspective about how youth staff are using the ILS when working with kids and families. From that time I also have experience working with SWAN on a large project utilizing workflows to create thousands of student library cards. As a director I also can see the bigger picture while also having recent experience and connections to how every day staff use it. I'd be happy to be involved in any manner in the search.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Library directors

ILS Search Committee self-nomination

Name	Brittany Smith
Library	Saint Charles Public Library District
Please describe the background and relevant experience you will bring to the ILS search.	As the Technical Services Manager at a cataloging library within SWAN, the ILS is integral to my work. I am responsible for being an ILS expert not only to train and support my staff, but also to serve as a resource for colleagues. While I am newer to technical services, I bring more than a decade of experience working in SWAN libraries and extensive experience with both our current and previous ILS. My perspective on the ILS extends well beyond technical services. From 2013–2021, I served on the SWAN Circulation Advisory Committee, and throughout my career I have been one of the primary ILS resources at the libraries where I worked. I have participated in multiple major system changes, including the 2013–2015 ILS migration and the addition of the new 19. These experiences have reinforced for me how important it is for both circulation and technical services staff to understand not only how an ILS functions, but how it is configured and supported within a consortium. My experience working for the Pinnacle Library Cooperative from 2023–2026 further broadened this perspective. As Member Services Librarian, I served as both a system administrator and library trainer, becoming an ILS expert across multiple functional areas. I was responsible for troubleshooting, documenting solutions, and developing training for member libraries. I also gained hands-on experience with Polaris, including system administration, circulation, acquisitions, cataloging, serials, searching and holds, and record sets. I believe my experience across circulation, technical services, administration, and consortium services would bring a valuable and well-rounded perspective to the committee. I understand the ILS from both the library and consortium sides, and I would welcome the opportunity to use that experience to thoughtfully evaluate SWAN's options and help identify the solution that best serves all of our member libraries.

Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Brooke Sievers
Library	Addison Public Library
Please describe the background and relevant experience you will bring to the ILS search.	This is such an exciting opportunity! Thank you for taking the time to read a bit about me. Current responsibilities: I'm the Assistant Director at APL and the departments that report to me are Materials Management (cataloging, acquisition, processing, shelving, collection development), Guest Services (circulation), and IT Services (makerspace, tech help desk, and backend IT support). Working closely with these departments gives me a broad view of the staff and patron experiences using WorkFlows, Aspen, and BLUEcloud. Experience: My background is in bibliographic services. I've held different roles in Tech Services departments from 2006-2021. In 2022, I coordinated an ILS Roadmap Committee to assess the current satisfaction of our ILS, perform an environmental scan to see what our other ILS options were, gather input from staff from any vendor demos, analyze ROI for migrating, and report to the APL Board and Director with a roadmap for the next 5 years. I've led migration teams going from Millennium to Sierra (2012), Encore to Pika (discovery layer, 2019), and Sierra/Pika to SWAN/WorkFlows/Aspen (2023). I have experience drafting and evaluating RFPs for phone systems, AMH equipment, discovery layers, and architecture services. Perspective: I do not use Workflows on a regular basis. I don't have an affinity for any specific ILS. I understand that each one has benefits and disadvantages. My focus is to ensure staff have the best tools to make their work easier and more efficient so we can better serve patrons. I would be looking at this committee work through a big picture lens which may or may not be what you're looking for.

	Thank you for your consideration! APL is committed to being an active and thoughtful participant in any ILS discussions we're included in. Note: I will be on vacation from 9/12-9/27.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Cataloging;Circulation;Library directors

ILS Search Committee self-nomination

Name	Hubbell Hinkhouse
Library	Oak Brook Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I have been head of circulation at Oak Brook PL since 2018. Before that, I worked part-time in circulation at both OBPL and Villa Park PL while getting my MLIS. Librarianship wasn't my first career, however. Before working in libraries, I worked for a small business start-up in the industrial water treatment and personal care product space. I worked regularly with a variety of vendors on a large scale in this role even more so than I do now in libraries. In terms of my library experience, I think my in-depth experience and knowledge of our ILS and how it operates would prove valuable in the search for a potential new ILS. I understand some of our current limitations and have worked to create workarounds. For example, I've identified several deficiencies in the holds process for which I asked SWAN help to create reports. I have a very thorough understanding of virtually all aspects of WorkFlows that touch circulation, holds management, and item search parameters. Another role I have in my library is creating and distributing weeding, collection analysis, and hold demand reports across all departments using BCA. Here I've also identified some areas for improvement and requested custom reports to work around some deficiencies in the standard reports. Overall, I believe I have a good blend of experience to assist in the compilation of the information necessary for an RFP, the analysis of the responses, and working with our selected vendors to meet the needs of the entire consortium. I also recognize that a possible outcome of this search is no ILS change at all, or further negotiations with SirsiDynix to improve their product. The process of an ILS change is very onerous from top to bottom at the library and consortium level. That shouldn't be taken lightly and should be weighed against the potential improvements gained from a change in vendors.
Committee members will be expected to serve as representatives on at least one task force.	Circulation

If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	
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ILS Search Committee self-nomination

Name	Melissa Willer
Library	Downers Grove Public Library
Please describe the background and relevant experience you will bring to the ILS search.	Good morning, I am applying to serve as a member of the SWAN ILS search committee. For the past year and a half I have been the head of Circulation Services at the Downers Grove Public Library, where i have been heavily involved in adopting and implementing new library technology. I have a broad range of experience in libraries over the last thirty years; while the bulk of my time has been in public libraries, I have also worked in academic, special, and school libraries. I have worked in most areas of librarianship, including administration, serials librarianship, library programing, acquisitions, and have also been the manager of Technical Services for a mid-sized public library. During my tenure at Danville Public Schools I was part of the team that transitioned our libraries to our first ILS (Follett) and helped IT select and implement their first inventory management software. I am relatively unbiased towards ILSs, having experience with several in the past thirty years (Alma, Follet, Polaris, Sierra, Symphony) and I believe there are tradeoffs for any system we may adopt, and many reasons to stay the course with our current vendor. I think that the committee must carefully weigh both the benefits and the drawbacks or any system we explore and balance that with the disruption that migrating a ILS of our size and complexity would cause.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation

ILS Search Committee self-nomination

Name	Amy Weiss
Library	Woodridge Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I have worked at the Woodridge Public Library for over 43 years in all departments. I have used all the ILS's going back to CLSI. As the Technical Services Manager, I am not an OCLC library, but I use BLUEcloud Cataloging daily as well as BCA weekly. I also use the Acquisitions and Serials modules. Our library was one of first to work with both of these modules, and I was the lead in setting them up. Having worked in all departments, I know how the smallest piece of data entered effects the whole library in searchability and circulation. I have a very analytical mind that notices the minor details and looks at it from different aspects looking for the good and the bad. I hope that you will consider me for the Committee.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Ana Karun
Library	Woodridge Public Library
Please describe the background and relevant experience you will bring to the ILS search.	Working in circulation at a public library for 10 years has given me a good understanding of how important it is to navigate a library system efficiently. Not only for patrons but mainly for clerks who use the system every day to complete all circulation tasks. All those small details that a platform is designed can have a huge impact on our daily work. We need to eliminate any unnecessary workarounds. We need a platform that makes our job easier. For example, I wish we could have a button that would allow me to place 15 holds for a single book club with one click instead of clicking multiple times for each item. This might sound like a small feature, but when we are dealing with different book clubs, a task that should take 3 minutes can take much longer. This is why I am motivated to listen and explore what else is out there. I would like to be part of a group that will see all these kind of details. It is an opportunity to choose a platform that will simplify/cover our needs.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation

ILS Search Committee self-nomination

Name	Andrew Riis
Library	Eisenhower Public Library District
Please describe the background and relevant experience you will bring to the ILS search.	Hello, my name is Andrew Riis and I am the Assistant Head of Library Services (Circulation) at the Eisenhower Public Library District. I am submitting myself for self-nomination for the ILS Search Committee. I think I would make an excellent candidate for the committee for a variety of reasons. I am immersed in the ILS and I have always been interested in utilizing its fullest extent. I am interested in how it works and how it can be optimized to suit our needs. When we made the switch from Millennium to SirsiDynix years ago, I followed the selection process closely. I was curious about how our processes could be streamlined by changing our ILS. In the recent past, I participated in testing out BlueCloud circulation in our department and reported back to SWAN on our findings. I even gave a brief presentation on SWAN Expo back in 2024 discussing how the process went. I am very interested in exploring new ILSs and seeing if a change can be made that will benefit our library system.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation

ILS Search Committee self-nomination

Name	Athens
Library	Carol Stream Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I have been involved in IT and technologies with libraries for over 20 years. Including intranet development, strategic planning and two website redesigns, being lead on these projects. During my time at Glencoe under the CCS consortium, I was on the committee that explored ILS's at the time to either replace Sirsi Dynex or to keep it; presented findings and demonstrations of said ILS vendors that we investigated as well as developed training material for the selected ILS Polaris by Innovative. Very similar to this project where we as well split into task forces to cover various department and aspects of the vendor selection process. With librarian (Carol Stream, Glen Ellyn as SWAN) and IT management (Glencoe 6 years) experience heavily involved with ILS's, technology infrastructure as well as user experience, I do feel this would be a wealth of help to the team and the project.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation;Library directors;Reports

ILS Search Committee self-nomination

Name	Barbara Fitzgerald
Library	Oak Park Public Library (Main Library)
Please describe the background and relevant experience you will bring to the ILS search.	As Manager of Collection Services at Oak Park Public Library, I oversee Collections, Bibliographic Services, and Materials Handling. This gives me a broad operational perspective and an understanding of how ILS decisions affect the entire lifecycle of library materials, from selection and ordering through cataloging, discovery, circulation, and resource sharing. I work regularly with SirsiDynix Symphony and Aspen Discovery, along with the systems we use for ordering, interlibrary loan, and collection analytics. Much of my role involves reviewing workflows, troubleshooting system and data issues, improving how patrons find materials, and using collection data to guide decisions. I enjoy working collaboratively and learning how other libraries approach their work. I would be glad to bring my experience to the committee while also learning from colleagues across SWAN.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Christine Karns
Library	Bloomington Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I believe I am uniquely qualified to serve in this capacity as SWAN staff and board explore the possibility of moving to a new ILS. I have 20 years of library experience across various library departments giving me a broad understanding of how an ILS impacts library operations and staff. I understand how each area utilizes the ILS in different ways and how that usage needs to lead to impactful and thoughtful decision-making. In addition to my departmental experience, I work with cataloging, acquisitions and circulation on a day-to-day basis and understand the needs of SWAN member libraries in a new ILS as well as the strengths and weaknesses in our current system. Lastly, my experience with technology including lockers, RFID, and self-checks gives me a unique perspective on the needs of libraries that utilize this equipment and its importance when selecting a compatible ILS. This combination of operational, circulation, technical services, public services and technology experience would allow me to evaluate a new ILS from a well-rounded perspective and consider both consortium-wide needs and the day-to-day impact on both library staff and customers.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Circulation;Reports

ILS Search Committee self-nomination

Name	Colleen Seisser
Library	Westmont Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I believe I would be a great candidate for the ILS Search team because of my extensive knowledge of ILS's, experience working with a variety of vendors, and experience reviewing and drafting RFP's. While working as the Collection Services Manager at the Aurora Public Library District, I was instrumental in improving our ILS performance. Starting in 2020 I began to learn the full components of Polaris, the ILS we used. I was self taught up until then, finding webinars and reaching out to Polaris staff for help. In March of 2020, we had just closed to the public because of Covid and I had to fast track my learning to figure out how to do things like change circulation rules, update item types, and customize holds notices. At that time we did not have an ILS manager and it had been years since any major updates had been made to the ILS. I was able to bring Polaris up to date within a year and identify the different workflows that required an ILS administrator. We hired one in 2021! I also have experience with working with vendors, for example I led a team that implemented CollectionHQ at Aurora and within two years all staff were using it to weed their collections across three branches and a bookmobile. Additionally, I worked constantly with our materials vendors and am proud that I was able to set up Ingram as an EDI vendor for Aurora starting back in 2019 and completed it through the end of 2020 (it was stalled during the pandemic closures). In my current role as the Assistant Director at the Westmont Library, I regularly work with vendors and finance workflows daily in areas like IT, maintenance, marketing, and supplies. As the Collection Development Manager at Aurora, I conducted a consortium search in 2020 for the Library. I reached out to all area consortiums (including SWAN!) to conduct email interviews for key information. As needed, I followed up with additional questions for information I was looking for. I received responses from all the consortiums I contacted and I presented my findings, as well as organized the raw data, for our Administration Team. I believe this experience would be a great asset to SWAN as we look to evaluate RFP's for the ILS search.

	Finally, as the Assistant Director at the Westmont Public Library and as a SWAN member, I have made a concerted effort to learn the ins and outs of our ILS (Workflows and Aspen) and the other components like MessageBee, BCA, and PatronPoint. In 2024, I took on the management of our Patron Services and Materials Services departments. While I am not hands on day to day, I do oversee larger projects (for example, when we implemented PatronPoint for Library Card sign ups) and troubleshoot challenges that staff are unable to solve on their own (currently, I am researching improvements for our label printers). I cover the Library's checkout desk at a moment's notice and am well versed in the everyday workings of the circulation functions. I am also experienced with BCA and helping staff find reports that will work for them. Now that I am becoming more hands on with our Materials Services staff, I am evaluating different points of efficiency and where improvements might be made. Most recently, I have gained experience with reviewing and drafting RFP's as WPL has engaged with a team of consultants to conduct a capital assessment. I was involved every step of the way as I shadowed my Director while we worked through hiring the consultants, conducting the assessment, to now carrying out the various projects identified in the report. Additionally, I am drafting a RFP for this fall as we look to hire a new contract for our cleaning services. Finally, I feel that I am an asset to any team because I have strong communication and organization skills. I have been in a leadership position in libraries for almost ten years now. I have a strong record of volunteering for library organizations. Most notably I was a member of the YALSA, a division of ALA, Board of Directors from 2018-2021 and served as their President-Elect, President, and Past President from 2022-2025. I am very familiar with committee work and the different steps along the way for making decisions in a member supported organization. Thank you for your consideration!
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN	Acquisitions;Cataloging;Circulation;Library directors;Reports

may also contact you to serve on these task forces based on your interest.	
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ILS Search Committee self-nomination

Name	Elias S. Pera
Library	Eisenhower Public Library District
Please describe the background and relevant experience you will bring to the ILS search.	I started in Tech. Services processing materials (1 1/2 years) before joining the Reference Dept. (12 years), where I am "on desk" between 4-7 hours every day. During that time, I am constantly using both the Cataloging and Circulation modules of Symphony WorkFlows as I assist patrons, weed and maintain my collections, address minor bib or item record issues as they arise (or pass on those that may be more significant), etc. I feel that a Reference perspective, particularly when concerning the small, everyday tasks, would be helpful to have when considering a new ILS.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation

ILS Search Committee self-nomination

Name	Jenny Cuevas
Library	Addison Public Library
Please describe the background and relevant experience you will bring to the ILS search.	As Head of Materials Management, I oversee cataloging, acquisitions, collection development, shelving, processing, and interlibrary loan services. Data influences processes throughout the library, which impacts patron service including how items display in the catalog, how orders are created, how they connect to invoicing and receiving, and how loan rules, location codes, and item codes impact circulation functions. My focus is understanding which data impacts the patron experience to ensure its accuracy. In my daily work, I analyze reports created in BLUEcloud Analytics (BCA) including filtering and analyzing data to obtain meaningful insights, utilizing Derived Elements to create customized lists and filters, and maximizing these tools to group and organize data based on library specific needs. I'm also experienced in scheduling, managing, and exporting reports to support library specific needs. One recent example involved identifying call numbers that were displaying incorrectly because accented characters were not being recognized in Workflows. Using BCA, I created a report to locate affected items, coordinated updates to records in Workflows, and ensured that spine labels were corrected. This project improved item discoverability and made it easier for both patrons and staff to locate materials. I use Workflows daily for editing and creating bibliographic, item, and on-order records. I also have experience with MARC Edit, OCLC Connexion, Excel scripts, SQL queries, iii Sierra, iii Polaris. I also bring more than 10 years of managerial experience in Circulation, giving me extensive knowledge of patron services, circulation workflows, policies, and the ways ILS functionality directly impacts both staff and patron experiences. During Addison Public Library's migration to SWAN, I played a key role in resolving a data issue involving patron fines. The test data extract provided did not accurately map fines to

	patron records. Using Sierra Direct SQL Access, I wrote custom SQL queries to identify and validate the missing data. As a result, the correct information was provided for the final data load, ensuring fine records were assigned to the appropriate patrons. My experience working with multiple ILS platforms, data migrations, and reporting tools have given me valuable insight into the features and functionality that should be considered when evaluating a new ILS. I understand that no system is perfect and believe successful evaluation requires balancing functionality, usability, efficiency, reporting capabilities, and patron impact. I also enjoy working on committees and have participated in them through RAILS, SWAN, and the Addison Public Library. Most recently, I completed being a member of the iCAMP Planning Committee as a member of the Recruitment Subcommittee. In that role, I matched mentors and mentees, developed feedback forms, and participated in presentations promoting the program and sharing its impact. Having this background and experience makes me a top candidate to serve on the SWAN ILS Search Committee. Jenny Cuevas
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Jenny Yasecko
Library	Oak Lawn Public Library
Please describe the background and relevant experience you will bring to the ILS search.	Throughout my 15 years in public libraries, I have played an active role in evaluating, implementing, and supporting major technology initiatives, including two Integrated Library System (ILS) migrations. As a Library Clerk, I participated in vendor demonstrations, assessed system functionality from a circulation perspective, provided feedback on operational needs, and assisted with staff training during implementation. As Head of Technical Services, I inherited an ILS migration already in progress and became deeply involved in ensuring its success. My responsibilities included participating in daily project reviews, attending weekly implementation meetings, overseeing record cleanup and data preparation, and helping facilitate a smooth transition for both staff and patrons. Following implementation, I supported ongoing staff training and served as a resource for colleagues as they adapted to the new system. In addition to my ILS experience, I have been involved in evaluating and selecting a variety of library technologies and services, including RFID systems, print management solutions, and patron computer software. These experiences have strengthened my ability to objectively assess vendor proposals, compare competing solutions against established criteria, and balance operational, technical, and user needs. I am committed to exploring innovative technologies and improving library procedures, and I believe my experience reviewing bids and measuring vendors against defined metrics would make me a valuable member of the selection team.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task	Acquisitions;Cataloging;Reports

forces based on your interest.	
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ILS Search Committee self-nomination

Name	Joy Anhalt
Library	Tinley Park Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I would like to nominate myself to serve on the SWAN ILS Task Force. I have worked as the Technical Services Manager at the Tinley Park Public Library for 34 years, during which I have gained hands-on experience with multiple integrated library systems, including GEAC, Innovative, and SirsiDynix Workflows. My primary focus has been the cataloging module, and I have extensive knowledge of serials management. I also regularly use BCA to run reports and compile statistics for my library. As SWAN liaison, I have worked across all modules of the system and understand how the different functions interact and impact one another—an interdependence that is critical to keep in mind when evaluating or selecting an ILS. I also served on the last ILS search committee, which gave me valuable insight into the evaluation and selection process. My work in technical services requires close attention to detail, and I believe this, combined with my breadth of experience across multiple systems and my role as liaison, would make me a valuable asset to the committee. A dynamic, well-functioning ILS is crucial to SWAN's continued success and the future of our system, and I would welcome the opportunity to contribute to that effort. Thank you for your consideration.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task	Cataloging;Reports

forces based on your interest.	
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ILS Search Committee self-nomination

Name	Kathy Welko
Library	Addison Public Library
Please describe the background and relevant experience you will bring to the ILS search.	My name is Kathy Welko, and I am the Head of Guest Services at Addison Public Library. I started working in libraries in 2009 in the Circulation Department at Fountaindale Public Library District. At that time, we used SirsiDynix as our ILS. We later transitioned to Polaris, and I was one of the trainers responsible for teaching staff how to use the ILS. I have experience using both the desktop version of Polaris and the web version, Leap. When I started at Addison Public Library, we used Sierra. As Head of Community Engagement, I used Sierra both in the building and remotely by connecting via remote desktop using ConnectWise. After moving into my current role as Head of Guest Services, I became responsible for training staff on Sierra and providing ongoing coaching. I was also part of the migration team when Addison Public Library joined SWAN, and I helped train not only Guest Services staff but also staff across all departments on SirsiDynix WorkFlows. I was also part of the team that researched a new automated materials handling (AMH) system for Addison Public Library. Through that experience, I gained an understanding of the vendor demonstration and evaluation process, as well as how to assess the benefits of different products based on an organization's specific needs. As a member of the SWAN Circulation Working Group and through my participation in SWAN Circulation Networking Group meetings, I have developed a good understanding of the circulation needs of SWAN libraries. I look forward to contributing my experience and perspective to the selection of SWAN's next ILS. Thank you for considering my self-nomination.
Committee members will be expected to serve as representatives on at	Circulation;Reports

least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	
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ILS Search Committee self-nomination

Name	Lizzy Boden
Library	Hinsdale Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I am currently the Assistant Director and Adult Services Manager at the Hinsdale Public Library. My most immediately relevant experience is writing an RFP, forming a committee, and evaluating proposals for our recent new website project. I have learned what makes a good RFP and what pitfalls can happen during the process. I worked very closely with detailed statistics for myself and all my colleagues at Hinsdale. I have helped catalog, change patron data, and train staff on all aspects of WorkFlows, and I believe I have a good sense of what is needed in an ILS. I would be pleased to be part of the Search Committee and I think I could be a good asset.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Reports

ILS Search Committee self-nomination

Name	Marissa Hegel
Library	Hinsdale Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I am currently a Youth Services Librarian at the Hinsdale Public Library and am one of the selectors for our youth collections. Before working in libraries and earning my MLIS, I obtained an MBA and worked with software developers to build a system at a real estate company with a heavy focus on revenue reporting. I have worked with many different systems throughout my careers in business and libraries; thus, I am well-versed in exploring and testing systems as well as learning how they work and what different function capabilities are out there. I have a particular interest in reports and having them be as intuitive and user-friendly as possible to make it easier to utilize data for weeding and selection purposes.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Reports

ILS Search Committee self-nomination

Name	Maura Terrado
Library	Thomas Ford Memorial Library
Please describe the background and relevant experience you will bring to the ILS search.	I am currently the Head of Circulation at the Thomas Ford Library. But I previously worked for 22 years at another SWAN library-as a Youth Services Librarian, Reference Librarian, and served as a supervisor for both the youth and adult departments.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation

ILS Search Committee self-nomination

Name	Melissa Siddiqui
Library	Oak Brook Public Library
Please describe the background and relevant experience you will bring to the ILS search.	Hello! I have worked with SirsiDynix for 16 years, and as cataloger (& acquisitions user) for 11 of those years. While I have not migrated to a new ILS before, I do have experience in the research that goes into migrating public catalogs. I was on the Enterprise Migration Task force back in 2017-2018, as well as piloting Aspen at OBD. I was also responsible for consolidating OBD's item record data when MAGIC joined SWAN.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Rebecca Bartlett
Library	LaGrange Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I have been the Access Services Manager at La Grange Public Library since 2011. I supervise employees in circulation, interlibrary loan and technical services. I chaired the Acquisitions Task Force during the 2013-2014 SWAN ILS Search that ultimately selected SirsiDynix Symphony WorkFlows. Our task force also reviewed RFPs for Equinox Evergreen and VTLS Virtua. My areas of expertise are Acquisitions and Statistics. This year, I created instructions for SWAN Library staff to import cart orders from Amazon into WorkFlows. I presented "Cross-Department Training Using SirsiDynix WorkFlows" at the Customers of SirsiDynix Users Group, Inc. (COSUGI) Conference in April 2026 and co-presented "Pre-Built Reports and How People Use Them" at SWAN Expo in August 2026.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

ILS Search Committee self-nomination

Name	Sky Stopen
Library	Indian Prairie Public Library
Please describe the background and relevant experience you will bring to the ILS search.	I have been a Guest Services Supervisor at Indian Prairie Public Library for the past 4 years. One of the areas I specialize in is OCLC and Interlibrary Loan. I also help with acquiring books for our library's book clubs and local middle and high schools (placing holds, specialized due dates, etc.) On a daily basis I use Workflows for check-ins/checkouts, renewals, placing holds, managing the hold shelf, on-shelf items, billing users, paying fines, and modifying user records. When working with OCLC and out of system items, I also use Workflows for making and deleting temporary item records. As a Supervisor, I have also been tasked with entering the days that the library is closed. On the occasional internet outage, I have used the Offline Mode of Workflows as well. In addition to the everyday use of Workflows, I have also been working very closely with my department head (Cindy Maiello-Gluecklich) for the past year and a half on doing the monthly reports for our board. In that time, I have become familiar with BCA. I think that these things combined give me a thorough understanding of Workflows and the kind of tasks we need our software to be able to accomplish. I am able to consider it through the associate perspective as well as the manager perspective. I am a quick learner and am fairly tech savvy. Once I know how to do something, I enjoy teaching others how to do it as well.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Circulation;Reports

ILS Search Committee self-nomination

Name	Susana Leyva
Library	Downers Grove Public Library
Please describe the background and relevant experience you will bring to the ILS search.	Hello, I am Susana Leyva, I have dedicated 20 years in public library services, specializing in technical services. I come from currently working at a cataloging library, but previous have worked in non-cataloging libraries maintaining a collection between 75k – 240k collection materials. I am co-chair of the Acquisitions & Cataloging Networking group since 2024, and previously participated in the SWAN’s Cataloging Advisory group and SWAN Diversity and Inclusion Group. During the ILS search from Millennium to Symphony SirsiDynix, I participated on a task force for acquisitions. I’ve handled in-depth training in all five modules (Acquisitions, Cataloging, Circulation, Reports, and Serial Control). I have collaborative leadership with 15 year of management experience in staff training and development, adept at managing and coordinating library departments to ensure quality, accuracy, and productivity. If chosen to be part of the committee, I am committing to honest feedback, a leadership lens and to foster a collaborative space alongside with other library leaders.
Committee members will be expected to serve as representatives on at least one task force. If not selected for the ILS Search Committee, SWAN may also contact you to serve on these task forces based on your interest.	Acquisitions;Cataloging;Reports

**AMENDMENT
TO
AGREEMENT**

This amendment between the parties listed in the signature blocks below ("**Amendment**"), when accepted by SWAN Consortium (hereinafter referred to as "**Customer**"), will become part of the SWAN Consortium 5yr Master Agreement dated April 20, 2020, as may have been subsequently amended from time to time (collectively referred to herein as "**Agreement**"), and will evidence our further agreement with respect to the matters set forth below.

All terms used herein and in the Agreement, not defined herein, shall have the same meaning as in the Agreement. If there is any inconsistency between the terms of this Amendment at the Agreement, the terms of this Amendment will govern.

The Initial Term shall be extended for an additional 3 years, from May 1, 2026 through April 30, 2029.

Pricing for products for the additional 3 years of the Initial Term are included in LTA Renewal Quote: 019000100, and Schedule 1 Pricing for Optional Items, and Schedule 13 Add-on Pricing, attached.

All other terms and conditions of the Agreement remain unchanged.

If the foregoing correctly sets forth your understanding of our agreement with respect to the matters treated above, please indicate your acceptance and approval below.

This Amendment may be executed in any number of counterparts, each of which when executed and delivered shall be an original, but all of such counterparts shall constitute one and the same instrument.

This Amendment shall be effective as of the date of the last signature below.

IN WITNESS WHEREOF, the parties have caused this Amendment to be executed by their duly authorized representatives as identified below.

SWAN Consortium

Authorizing Signature	
Name	Aaron Skog
Address	915 Harger Rd, Ste 260 Oak Brook, IL 60523
Title	Executive Director
Date	4/28/2025

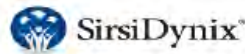
SirsiDynix

Authorizing Signature	
Name	
Address	3300 N. Ashton Blvd. – Ste 500 Lehi, UT 84043
Title	
Date	

File: _____

SirsiDynix Confidential

Page 1 of 1



Renewal Quote: 019000100

SWAN Consortium

Item Number	Item Description	Serial Number	Qty	Coverage Effective Dates From	To	Year 1 2026-2027	Coverage Effective Dates From	To	Year 2 2027-2028	Coverage Effective Dates From	To	Year 3 2028-2029
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
13037	SirsiDynix Single Sign-On Annual Subscription		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10014M	SirsiDynix ILS Core Package License Increase, Maintenance		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst), Maintenance	GlenSide	1	1/May/26	30/Apr/27	4,998.10	1/May/27	30/Apr/28	5,193.03	1/May/28	30/Apr/29	5,395.56
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst), Maintenance	Warrenville	1	1/May/26	30/Apr/27	5,227.53	1/May/27	30/Apr/28	5,431.40	1/May/28	30/Apr/29	5,643.22
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst), Maintenance	Rosele	1	1/May/26	30/Apr/27	3,933.37	1/May/27	30/Apr/28	4,086.77	1/May/28	30/Apr/29	4,246.15
10013M	SirsiDynix Symphony Core		1	1/May/26	30/Apr/27	181,794.62	1/May/27	30/Apr/28	188,884.61	1/May/28	30/Apr/29	196,251.11
10011M	SirsiDynix Symphony ReferenceLIBRARIAN		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10029M	SirsiDynix Symphony SmartPORT Unlimited Users		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10030M	SirsiDynix Symphony Test System		1	1/May/26	30/Apr/27	17,599.77	1/May/27	30/Apr/28	18,296.16	1/May/28	30/Apr/29	18,999.32
10032M	SirsiDynix Symphony Unicode Server Extension Test System		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
13775M	Oracle Embedded License		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
13775M	Oracle Embedded Test License		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10016M	SirsiDynix Symphony Additional Institution Fee (per individual Inst), Maintenance		1	1/May/26	30/Apr/27	4,317.90	1/May/27	30/Apr/28	4,486.30	1/May/28	30/Apr/29	4,661.27
10017M	SirsiDynix Symphony Academic Reserves		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10018M	SirsiDynix Symphony Acquisitions		1	1/May/26	30/Apr/27	5,260.94	1/May/27	30/Apr/28	5,485.96	1/May/28	30/Apr/29	5,699.91
11544M	SirsiDynix Symphony SaaS		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10022M	SirsiDynix Symphony Electronic Data Interchange (EDI), X12		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
12367M	SirsiDynix Symphony Vendor Integration Protocol (VIP)		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10021	SirsiDynix Symphony Collection Exchange		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10023M	SirsiDynix Symphony Materials Booking		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10024M	SirsiDynix Symphony OutReach		1	1/May/26	30/Apr/27	3,845.55	1/May/27	30/Apr/28	3,995.53	1/May/28	30/Apr/29	4,151.36
10028M	SirsiDynix Symphony Serials		1	1/May/26	30/Apr/27	5,279.94	1/May/27	30/Apr/28	5,485.86	1/May/28	30/Apr/29	5,699.81
12359M	SirsiDynix Symphony NCIP Interface Per Certified Vendor		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10020M	SirsiDynix Symphony Debt Collection Agency Interface (per institution)		1	1/May/26	30/Apr/27	3,783.92	1/May/27	30/Apr/28	3,931.49	1/May/28	30/Apr/29	4,084.82
13184	BLUEcloud Analytics, Annual Subscription		1	1/May/26	30/Apr/27	29,586.52	1/May/27	30/Apr/28	30,740.39	1/May/28	30/Apr/29	31,939.27
13376	BLUEcloud Visibility, Annual Subscription		1	1/May/26	30/Apr/27	9,053.85	1/May/27	30/Apr/28	9,406.95	1/May/28	30/Apr/29	9,773.82
13181	Platinum Services - Web Services SDK for Libraries Internal Use - Included with P		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
14198	Platinum Services - Web Services Gateway for 3rd Party Apps - Included with P		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
14446	SirsiDynix Unlimited Non-Discovery Connectors, Annual Subscription		1	1/May/26	30/Apr/27	14,071.02	1/May/27	30/Apr/28	14,619.79	1/May/28	30/Apr/29	15,189.96
14456	SirsiDynix Web Services Unlimited Included Connector for LuserOne, Annual Su		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
13149	BLUEcloud MobileCirc, Annual Subscription		1	1/May/26	30/Apr/27	9,442.28	1/May/27	30/Apr/28	9,810.53	1/May/28	30/Apr/29	10,193.14
13966	SirsiDynix Symphony Data Control, Annual Subscription [Data Control Package]		1	1/May/26	30/Apr/27	1,760.26	1/May/27	30/Apr/28	1,828.93	1/May/28	30/Apr/29	1,900.26
11176	Consulting - API, Annual Additional Regional Workshop Attendee (Requires Cur		1	1/May/26	30/Apr/27	2,640.02	1/May/27	30/Apr/28	2,742.98	1/May/28	30/Apr/29	2,849.96
13111	Data Services - Annual Update Service - Reading Information		1	1/May/26	30/Apr/27	1,760.26	1/May/27	30/Apr/28	1,828.93	1/May/28	30/Apr/29	1,900.26
M-2732	SmartSOURCE Network Access, Annual Subscription		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
10535	Data Services - Authority Annual Subscription - Monthly Update Service		1	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
12442	Platinum Services Package - Premier		1	1/May/26	30/Apr/27	13,200.10	1/May/27	30/Apr/28	13,714.90	1/May/28	30/Apr/29	14,249.78
14002	Dialog 4 Port SVA Card		4	1/May/26	30/Apr/27	0.00	1/May/27	30/Apr/28	0.00	1/May/28	30/Apr/29	0.00
14335	*BLUEcloud Analytics Private Suite Add-on, Annual Subscription		1	1/Jan/26	31/May/27	6,900.00	1/Jan/27	30/Apr/28	6,571.68	1/Jan/28	30/Apr/29	7,445.69

All prices are in U.S. Dollars and are exclusive of taxes unless otherwise noted.

Total \$ 324,475.09

Total \$ 336,532.19

Total \$ 350,277.57

****Due to changes in sales tax laws, we are requesting updated tax exemption certificates from all customers. Tax may be added to your invoice even though you are exempt if we do not receive the exemption

*This quote is based on a 3.9% uplift and is dependent upon the signing of a 3 year Long Term Agreement. SirsiDynix is not obligated to honor the quote if those conditions are not met. SirsiDynix reserves the right to adjust pricing for Third Party/Integrated products/services

Signature
Please Print Name and Title

Date

*Please note: BLUEcloud Analytics Private Suite Add-on, Annual Subscription Year 1 value was paid on INV21971, as a new add-on product to the account. Year 2 is pro-rated into the on-going maintenance period, which will cover 11 months. Year 3 is the full 12 month value.

Schedule 1

Pricing for Optional Items

SaaS Hosted Solution with Discounted Pricing

	2026	2027	2028
Symphony SaaS Subscription	\$454,318	\$472,037	\$490,446
SaaS Migration One-time Services	\$22,500	-	-

Notes:

- (1) Symphony SaaS Subscription replaces all Symphony ILS Items in SWAN's annual maintenance, currently utilized by SWAN only.
- (2) Non-Symphony ILS items will continue at their previous rates.
- (3) Includes 700 SaaS simultaneous staff user seats.
- (4) Annual Circulation Limit of 18,700,000.

License Expansion Costs beyond 18.7 million annual Circulation (non add-on library expansion pricing)

	\$2,026	\$2,027	\$2,028
SirsiDynix ILS Additional 350K Annual Circ	\$5,000	\$5,345	\$5,714
SirsiDynix ILS Additional 600K Annual Circ	\$7,500	\$8,018	\$8,571
SirsiDynix ILS Additional 1,100K Annual Circ	\$12,750	\$13,630	\$14,570
SirsiDynix ILS Additional 1,350K Annual Circ	\$15,000	\$16,035	\$17,141

SCHEDULE 13

Add-On Pricing

- A. Public Library Add-On Pricing
- B. Academic and Special Library Add-On Pricing
- C. School Library Add-On Pricing
- D. Pricing for Exit Services for SWAN Consortium Libraries

SCHEDULE 13A

Public Library Add-On Pricing

Pricing for Add-on Public Libraries with less than 1,350,000 Annual Circulation

					per annual circ				
SirsiDynix Symphony Software*					First Year		Second Year		
SirsiDynix ILS (Dynix, Horizon, Unicorn, Symphony) + Branches							0.025		0.025
Non-SirsiDynix ILS:							0.020		0.020
					Non-SirsiDynix				
					Customer Discount	Standard (bib/item, auth, circ)		Deluxe (Standard + acq, ser)	
						First Year	Second Year	First Year	Second Year
Data Migration									
	Level 1	1-150k	Circs		0% \$	14,500.00		17,500	
	Level 2	151-350k	Circs		10% \$	17,000	NA \$	20,000	NA
	Level 3	351k-500k	Circs		15% \$	20,000	NA \$	22,500	NA
	Level 4	601k-850k	Circs		20% \$	22,500	NA \$	25,000	NA
	Level 5	851k-1100k	Circs		25% \$	25,000	NA \$	27,500	NA
	Level 6	1101K - 1350K	Circs		30% \$	27,500	NA \$	30,000	NA
Additional Discounts							First Year		Second Year
	Year 1	15% off data migration					-15%		NA
Sample Scenarios							First Year		Second Year
	SirsiDynix ILS, 350k Circs, Standard Migration				\$	25,750	\$	8,750	
	Non-SD ILS, 350k Circs, Deluxe Migration				\$	24,000	\$	7,000	
	SirsiDynix ILS, 600k Circs, Deluxe Migration				\$	37,500	\$	15,000	
	Non-SD ILS, 600k Circs, Standard Migration				\$	32,000	\$	12,000	
	SirsiDynix ILS, 850K Circs, Standard Migration				\$	43,750	\$	21,250	
	Non-SD ILS, 850K Circs, Standard Migration				\$	39,500	\$	17,000	
	SirsiDynix ILS, 1100K Circs, Deluxe Migration				\$	55,000	\$	27,500	
	Non-SD ILS, 1100K Circs, Deluxe Migration				\$	49,500	\$	22,000	
	SirsiDynix ILS, 1350K Circs, Deluxe Migration				\$	63,750	\$	33,750	
	Non-SD ILS, 1350K Circs, Deluxe Migration				\$	57,000	\$	27,000	
Notes to Pricing									

1. The above add-on pricing applies to any small library (<1350 circs) that joins during the term of the Agreement (years 1-7)
2. The pricing for a large library or consortium (>1350k circs) wishing to join SWAN, such as Consolidated Computer Services, RSA, MAGIC or LIA would be separately negotiated.
3. If there is no data to migrate, pricing will be based on estimated circulation using the software metrics with a minimum cost of Year 1 \$5000 Year 2 \$1500 per library and Year 1 \$1500 Year 2 \$500 per branch.

À la Carte Pricing for Optional Migration Services for Public Libraries with less than 1,350,000 Annual Circulation

Marc Dataload

Level 1	1-150k	Circs	\$	2,500.00
Level 2	151-350k	Circs	\$	5,500.00
Level 3	351k-600k	Circs	\$	8,500.00
Level 4	601k-850k	Circs	\$	11,000.00
Level 4	851K- 1100K	Circs	\$	13,500.00
Level 6	1101K - 1350K	Circs	\$	16,500.00

Patron Dataload

Level 1	1-150k	Circs	\$	1,500.00
Level 2	151-350k	Circs	\$	2,500.00
Level 3	351k-600k	Circs	\$	3,500.00
Level 4	601k-850k	Circs	\$	4,500.00
Level 5	851K- 1100K	Circs	\$	5,500.00
Level 6	1101K - 1350K	Circs	\$	6,500.00

Transaction Dataload

Level 1	1-150k	Circs	\$	1,500.00
Level 2	151-350k	Circs	\$	2,500.00
Level 3	351k-600k	Circs	\$	3,500.00
Level 4	601k-850k	Circs	\$	4,500.00
Level 5	851K- 1100K	Circs	\$	5,500.00
Level 6	1101K - 1350K	Circs	\$	6,500.00

Aquisitions or Serials

Level 1	1-150k	Circs	\$	1,000.00
Level 2	151-350k	Circs	\$	1,500.00
Level 3	351k-600k	Circs	\$	2,500.00
Level 4	601k-850k	Circs	\$	5,000.00
Level 5	851K- 1100K	Circs	\$	7,500.00
Level 6	1101K - 1350K	Circs	\$	10,000.00

Consulting Options

25 hour Premier Package:

1. Policy Profiling preparation (internal – 1 hour to prepare policychart)
2. Initial Policy Profiling (5 hours)
3. Batch Policyload (internal - 6 hours)
4. Data Test Load Review (1 day – 3 hours)
5. Final System Configuration (2 days – 8 hours)
6. Remote Go-Live assistance (2 hours)

\$ 4,375.00

15 hour Standard package:

1. Policy Profiling preparation (internal – 1 hour to prepare policychart)
2. Initial Policy Profiling (1 day – 4 hours)
3. Create libraries and run the make users and auto.pl reports (internal - 1 hour)
4. Data Test Load Review (1 day – 3 hours)
5. Final System Configuration (1 day – 6 hours)

\$ 2,625.00

SCHEDULE 13B

Academic and Special Library Add-On Pricing

Pricing for Add-on Academic and Special Libraries with less than 1,000,000 Titles

SirsiDynix Symphony Software*					<i>per title</i>	
SirsiDynix Symphony Software*					First Year	Second Year
SirsiDynix ILS (Dynix, Horizon, Unicorn, Symphony) + Campus (per title)					0.050	0.050
Non-SirsiDynix ILS:					0.045	0.045
					Non-SirsiDynix	
					Customer Discount	Standard (bib/item, auth, circ)
						Deluxe (Standard + acq, ser)
Data Migration					First Year	Second Year
Level 1	1-10k	Titles		0%	\$ 14,500.00	NA
Level 2	10-50k	Titles		10%	\$ 17,000.00	NA
Level 3	51k-100k	Titles		15%	\$ 20,000.00	NA
Level 4	101k-250k	Titles		20%	\$ 22,500.00	NA
Level 5	251K- 500K	Titles		25%	\$ 25,000.00	NA
Level 6	501K - 1000K	Titles		30%	\$ 27,500.00	NA
Additional Discounts					First Year	Second Year
Year 1	15% off data migration				-15%	NA
Sample Scenarios					First Year	Second Year
SirsiDynix ILS, 50k Titles, Standard Migration					\$ 19,500	\$ 2,500
Non-SD ILS, 50k Titles, Deluxe Migration					\$ 13,250	\$ 2,250
SirsiDynix ILS, 100k Titles, Deluxe Migration					\$ 27,500	\$ 5,000
Non-SD ILS, 100k Titles, Standard Migration					\$ 24,500	\$ 4,500
SirsiDynix ILS, 250K Titles, Standard Migration					\$ 35,000	\$ 12,500
Non-SD ILS, 250K Titles, Standard Migration					\$ 33,750	\$ 11,250
SirsiDynix ILS, 500K Titles, Deluxe Migration					\$ 52,500	\$ 25,000
Non-SD ILS, 500K Titles Deluxe Migration					\$ 50,000	\$ 22,500
SirsiDynix ILS, 1000K Titles, Deluxe Migration					\$ 80,000	\$ 50,000
Non-SD ILS, 1000K Titles, Deluxe Migration					\$ 75,000	\$ 45,000
Notes to Pricing						

1. If there is no data to migrate, the software cost will be based on estimated titles with a minimum of \$5000 per institution and \$2500 annually.
2. The pricing for a large library (>1000k titles) wishing to join SWAN, such as Consolidated Computer Services, would be separately negotiated.

Marc Dataload

Level 1	1-10k	Titles	\$	2,500.00
Level 2	11k-50k	Titles	\$	5,500.00
Level 3	51k-100k	Tites	\$	8,500.00
Level 4	101k-250k	Titles	\$	11,000.00
Level 5	251K- 500K	Titles	\$	13,500.00
Level 6	501K - 1000K	Titles	\$	16,500.00

Patron Dataload

Level 1	1-10k	Titles	\$	1,500.00
Level 2	11-50k	Titles	\$	2,500.00
Level 3	51k-100k	Tites	\$	3,500.00
Level 4	101k-250k	Titles	\$	4,500.00
Level 5	251K- 500K	Titles	\$	5,500.00
Level 6	501K - 1000K	Titles	\$	6,500.00

Transaction Dataload

Level 1	1-10k	Titles	\$	1,500.00
Level 2	11-50k	Titles	\$	2,500.00
Level 3	51k-100k	Tites	\$	3,500.00
Level 4	101k-250k	Titles	\$	4,500.00
Level 5	251K- 500K	Titles	\$	5,500.00
Level 6	501K - 1000K	Titles	\$	6,500.00

Aquisitions or Serials

Level 1	1-10k	Titles	\$	1,000.00
Level 1	11-50k	Titles	\$	1,500.00
Level 2	51k-100k	Tites	\$	2,500.00
Level 3	101k-250k	Titles	\$	5,000.00
Level 4	251K- 500K	Titles	\$	7,500.00
Level 5	501K - 1000K	Titles	\$	10,000.00

Consulting Options**25 hour Premier Package:**

1. Policy Profiling preparation (internal – 1 hour to prepare policychart)
2. Initial Policy Profiling (5 hours)
3. Batch Policyload (internal - 6 hours)
4. Data Test Load Review (1 day – 3 hours)
5. Final System Configuration (2 days – 8 hours)
6. Remote Go-Live assistance (2 hours)

\$ 4,375.00

15 hour Standard package:

1. Policy Profiling preparation (internal – 1 hour to prepare policychart)
2. Initial Policy Profiling (1 day – 4 hours)
3. Create libraries and run the make users and auto.pl reports (internal - 1 hour)
4. Data Test Load Review (1 day – 3 hours)
5. Final System Configuration (1 day – 6 hours)

\$ 2,625.00

SCHEDULE 13C

School Library Add-On Pricing

Pricing for Add-on School Libraries with less than 100 Schools

SirsiDynix Symphony Software*					per school				
					First Year	Second Year			
SirsiDynix ILS (Dynix, Horizon, Unicorn, Symphony) + Branches						650	650		
Non-SirsiDynix ILS:						450	450		
					Non-SirsiDynix				
					Customer Discount	Standard (bib/item, auth, circ)	Deluxe (Standard + acq, ser)		
Data Migration						First Year	Second Year	First Year	Second Year
	Level 1	1-5 libraries	Schools		0%	3500	NA	\$ 5,000.00	NA
	Level 2	5-20 libraries	Schools		10%	\$ 5,000	NA	\$ 7,500.00	NA
	Level 3	21-40 libraries	Schools		15%	\$ 7,500	NA	\$ 10,000.00	NA
	Level 4	41-60 libraries	Schools		20%	\$ 10,000	NA	\$ 12,500.00	NA
	Level 5	61-80 libraries	Schools		25%	\$ 12,500	NA	\$ 15,000.00	NA
	Level 6	81 - 100 lib.	Schools		30%	\$ 15,000	NA	\$ 17,500.00	NA
Additional Discounts								First Year	Second Year
	Year 1	15% off data migration						-15%	NA
Sample Scenarios								First Year	Second Year
	SirsiDynix ILS, 20 Schools, Standard Migration					\$	18,000	\$	13,000
	Non-SD ILS, 20 Schools, Deluxe Migration					\$	16,500	\$	9,000
	SirsiDynix ILS, 40 Schools, Deluxe Migration					\$	36,000	\$	26,000
	Non-SD ILS, 40 Schools, Standard Migration					\$	25,500	\$	18,000
	SirsiDynix ILS, 60 Schools, Standard Migration					\$	49,000	\$	39,000
	Non-SD ILS, 60 Schools, Standard Migration					\$	37,000	\$	27,000
	SirsiDynix ILS, 80 Schools, Deluxe Migration					\$	67,000	\$	52,000
	Non-SD ILS, 80 Schools, Deluxe Migration					\$	51,000	\$	36,000
	SirsiDynix ILS, 100 Schools, Deluxe Migration					\$	82,500	\$	65,000
	Non-SD ILS, 100 Schools, Deluxe Migration					\$	62,500	\$	45,000
Notes to Pricing									

1. If there is no data to migrate, the software cost will be \$5000 per institution and \$500 annually.
2. The pricing for a large library (>100 schools) wishing to join SWAN would be separately negotiated.

Marc Dataload

Level 1	1-5 libraries	Schools	\$	2,500.00
Level 2	5 - 20 libraries	Schools	\$	5,500.00
Level 3	21-40 libraries	Schools	\$	8,500.00
Level 4	41-60 libraries	Schools	\$	11,000.00
Level 5	61-80 libraries	Schools	\$	13,500.00
Level 6	81 - 100 libraries	Schools	\$	16,500.00

Patron Dataload

Level 1	1-5 libraries	Schools	\$	1,500.00
Level 2	6-20 libraries	Schools	\$	2,500.00
Level 3	21-40 libraries	Schools	\$	3,500.00
Level 4	41-60 libraries	Schools	\$	4,500.00
Level 5	61-80 libraries	Schools	\$	5,500.00
Level 6	81 - 100 libraries	Schools	\$	6,500.00

Transaction Dataload

Level 1	1-5 libraries	Schools	\$	1,500.00
Level 2	6-20 libraries	Schools	\$	2,500.00
Level 2	21-40 libraries	Schools	\$	3,500.00
Level 3	41-60 libraries	Schools	\$	4,500.00
Level 4	61-80 libraries	Schools	\$	5,500.00
Level 5	81 - 100 libraries	Schools	\$	6,500.00

Aquisitions or Serials

Level 1	1-5 libraries	Schools	\$	1,000.00
Level 2	6-20 libraries	Schools	\$	1,500.00
Level 2	21-40 libraries	Schools	\$	2,500.00
Level 3	41-60 libraries	Schools	\$	5,000.00
Level 4	61-80 libraries	Schools	\$	7,500.00
Level 5	81 - 100 libraries	Schools	\$	10,000.00

Consulting Options

25 hour Premier Package:

1.	Policy Profiling preparation (internal – 1 hour to prepare policychart)		
2.	Initial Policy Profiling (5 hours)		
3.	Batch Policyload (internal - 6 hours)		
4.	Data Test Load Review (1 day – 3 hours)		
5.	Final System Configuration (2 days – 8 hours)		
6.	Remote Go-Live assistance (2 hours)	\$	4,375.00

15 hour Standard package:

1.	Policy Profiling preparation (internal – 1 hour to prepare policychart)		
2.	Initial Policy Profiling (1 day – 4 hours)		
3.	Create libraries and run the make users and auto.pl reports (internal - 1 hour)		
4.	Data Test Load Review (1 day – 3 hours)		
5.	Final System Configuration (1 day – 6 hours)		
		\$	2,625.00

SCHEDULE 13D

Pricing for Exit Services for SWAN Consortium Libraries

Remote access/export		
Remote access/export of Bib/Authority Module Data	\$	2,100.00
Remote access/export of Patron/Circulation Module Data	\$	1,400.00
Remote access/export of Acquisition Module Data	\$	2,100.00
Remote access/export of Serial Control Module Data	\$	2,100.00
Services Management	\$	300.00
Data Services - Remote access/additional test export (any module)	\$	1,000.00

Removal services/consulting		
Library Removal with no data	\$	1,200.00
Library Removal with Circulation and Bib Data	\$	2,400.00
Library Removal with Acquisitions and Serial Data	\$	3,600.00
Extraction of Bib Records	\$	300.00
Extraction of User Records	\$	300.00
Removal or Modification of MARC Holding Records	\$	600.00
Rebuilding of Indexes	\$	1,200.00

SWAN Assets and Potential Costs - 6/17/26 (3.9% Uplifts)

Asset Name	Current Year (26-27)	2027 - 2028	2028 - 2029
SirsiDynix Symphony Academic Reserves			
SirsiDynix Symphony Acquisitions			
BLUEcloud Analytics, Annual Subscription			
BLUEcloud Analytics Private Suite Add-on, Annual Subscription			
Consulting - API, Annual Additional Regional Workshop Attendee (Requires Current Package Validation)			
Data Services - Annual Update Service - Reading Information			
Data Services - Authority Annual Subscription - Monthly Update Service			
BLUEcloud MobileCirc, Annual Subscription			
SirsiDynix Symphony Collection Exchange			
SirsiDynix Symphony Additional Institution Fee (per individual inst)			
SirsiDynix Symphony Additional Institution Fee (per individual inst)			
SirsiDynix Symphony Additional Institution Fee (per individual inst)			
SirsiDynix Symphony Additional Institution Fee (per individual inst)			
SirsiDynix Symphony Additional Institution Fee (per individual inst)			
SirsiDynix ILS Core Package License Increase, Maintenance			
SirsiDynix Symphony Additional Institution Fee (per individual inst), Maintenance			
SirsiDynix Symphony Additional Institution Fee (per individual inst), Maintenance			
SirsiDynix Symphony Additional Institution Fee (per individual inst), Maintenance			
SirsiDynix Symphony Core			
Oracle Embedded License			
Oracle Embedded Test License			
SirsiDynix Symphony Additional Institution Fee (per individual inst), Maintenance			
SirsiDynix Symphony Data Control, Annual Subscription [Data Control Package]			
SirsiDynix Symphony Debt Collection Agency Interface (per institution)			
SirsiDynix Symphony Materials Booking			
Dialogic 4 Port SVA Card			
Platinum Services Package - Premier			
SmartSOURCE Network Access, Annual Subscription			
SirsiDynix Single Sign-On Annual Subscription			
SirsiDynix Symphony ReferenceLIBRARIAN			
SirsiDynix Symphony 9xx			
SirsiDynix Symphony Electronic Data Interchange (EDI), X12			
SirsiDynix Symphony Vendor Integration Protocol (VIP)			
SirsiDynix Symphony SmartPORT Unlimited Users			
SirsiDynix Symphony Test System			
SirsiDynix Symphony Unicode Server Extension Test System			
SirsiDynix Symphony OutReach			
SirsiDynix Symphony Serials			
SirsiDynix Symphony NCIP Interface Per Certified Vendor			
BLUEcloud Visibility, Annual Subscription			
Platinum Services - Web Services SDK for Libraries Internal Use - included with Platinum Premier subscription			
Platinum Services - Web Services Gateway for 3rd Party Apps - included with Platinum Premier subscription			
SirsiDynix Unlimited Non-Discovery Connectors, Annual Subscription			
SirsiDynix Web Services Unlimited Included Connector for LuxerOne, Annual Subscription			
	\$424,475.09	\$337,129.62	\$350,277.67
Rebate:	-\$100,000.00		
TOTALS:	\$324,475.09	\$337,129.62	\$350,277.67

SWAN Strategic Plan (2026 – 2030)

Introduction

This is an early draft of the strategic plan under development. The plan is undergoing discussion and revision with Board and Executive Director.

Mission

Defines the problem in society the organization is trying to solve.

We strengthen libraries through equitable access to information, resource sharing, and technology.

Vision

Answers “What is the organization’s solution?”

Every library, regardless of size or resources, has reliable and equitable access to collections, technology, and expertise and can connect in a collaborative culture wherein libraries succeed together.

Values

Values underpin how the organization operates.

Cooperation & Collaboration

Reliability

Dedication

Trust

Equity

Privacy & Security

Strategic Objective 1

SWAN is a leader in resource sharing and equipped to fulfill the contemporary needs of libraries.

Goal 1: Identify statewide resource sharing priorities and practices.

Possible activities

- Conduct a study of SWAN library usage of RAILS Delivery and align priorities
- Provide RAILS SWAN's RFID standardization to ensure RAILS delivery compatibility

Goal 2: Clearly define the organizational scope of SWAN.

Possible activities

- Explicitly define SWAN's role in group purchasing, including criteria for central purchases versus recommendations and opt-in choices
- Establish regular communication with RAILS to align strategic and tactical Objectives and better define boundaries between organizations.

Goal 3: Assess and update SWAN service portfolio to reflect the newly defined organizational scope

Possible activities

- Evaluate service offerings against our scope to ensure that we can maintain competitive standards and that staff support is scaled. Develop a service strategy.

Strategic Objective 2

Improve the library staff experience through a usable, accessible, and adaptable technology platform.

Goal 1: Evaluate and implement changes to ILS and analytics platforms to improve user experience.

Possible activities

- Conduct evaluation and solicit cost proposals for ILS and analytics platform
- Prioritize client ease of access throughout ILS evaluation
- Compare ILS releases over the past three years for each ILS submitted for RFP to identify both quantity, quality/substantiveness, and frequency of enhancements
- Analyze member-facing analytics, obtain feedback, and align statistics to meet member needs

Goal 2: Help libraries extend the SWAN platform through streamlined vendor integration procedures.

Possible activities

- Evaluate and revise our vendor access agreement.
- Improve vendor integration process, including encouraging member communication before onboarding, tracking of member/vendor relationships, streamlining integration etc.
- Vendor database with library networking opportunities

Goal 3: Reach a balance between standardization and local policies

Possible activities

- Publish a map of local vs. consortium-standard policies to communicate the balance
- Review the Library Use Policy and define clear areas where membership may opt out of certain SWAN platform features, such as using an alternative mobile app, and areas where use is mandatory.

Strategic Objective 3

Strengthen collaboration between SWAN and the membership, emphasizing transparency and multiple methods of participation.

Goal 1: Attain a deeper understanding of membership needs to drive decision-making

Possible activities

- Examine membership input and structure; comparison with other library consortia
- Perform top-level evaluation of Working Groups to realign missions to SWAN staff needs -- consider alternative vectors for membership problem-solving such as task forces, project groups, etc. as a replacement for working group structure
- Explore opportunities for asynchronous member input including a re-evaluation of our current SWAN Forums platform

Goal 2: Establish avenues for ongoing feedback and collaboration from the membership

Possible activities

- Create an annual, trackable, platform agnostic membership satisfaction survey to track satisfaction trends over time
- Collaboratively evaluate core platforms over 5 years: ILS, Analytics, MessageBee, OCLC, Aspen, LiDA, LMS, Forums, Online Patron Registration
- Annual feedback on networking and working groups – structure, frequency, activities, etc.

Strategic Objective 4

SWAN support is robust and responsive to member needs.

Goal 1: Deliver procedures to ease transition of new libraries and staff into SWAN

Possible activities

- Evaluate documentation that outlines what needs to occur for libraries to join or depart SWAN
- Establish an onboarding task force to identify onboarding support needs across member libraries, in preparation for a rollout of new staff interfaces- including training content, delivery methods, and train-the-trainer support

Goal 2: Strengthen documentation and outward communication

Possible activities

- Develop and implement a SWAN communications strategy that will identify the communications channels, frequency, audiences, and balance of in-person, remote, synchronous, and asynchronous communications that best serve the membership.
- Clear documentation of third-party requirements and their interaction with ILS or Aspen Discovery for quick reference
- Fully document and share decisions made regarding software adopted for use by the entire SWAN organization

Goal 3: Develop a customer service model to provide exceptional support to member libraries

Possible activities

- Professional development for SWAN employees on products that SWAN supports
- Build training and documentation for third-party systems so local experts can support a given software
- Improve ability to find training and documentation for SWAN and membership through a more robust, centralized Knowledge Base
- Build a formal member support tiering and escalation framework

Strategic Objective 5:

SWAN is a trusted steward of shared technology; libraries have confidence that private data is secure while resources available to staff and the public are open, safe, and accessible.

Goal 1: Review current data practices within the ILS and recommend revisions as they pertain to Strategic Objective 2 Goal 1.

Possible activities

- Evaluate data privacy security practices within consortium - (patron photos, digital signatures, SIP2, VPN)

Goal 2: Follow accessibility standards for all core platforms

Possible activities

- Advance accessibility of the SWAN platform and ensure compliance with WCAG 2.1 and Title II of the Americans with Disabilities Act

Goal 3: Define AI usage within SWAN platforms

Possible activities

- Complete policies for membership and SWAN employees pertaining to the permitted use of Generative AI and attribution.

Date: September 18, 2026
To: SWAN Board
From: Aaron Skog, Executive Director
Re: FY27 Budget Timeline



We are about to start preparation of the fiscal year 2028 budget for the July 1, 2027 – June 30, 2028 period. Below is a timeline of the budget process.

DATE	MEETING TYPE	ACTION ITEMS
September 1 - 30, 2026	Executive Director	Collect county tax data, submit FOIA to Cook County Treasurer for tax data.
Friday, October 18, 2026	Regular SWAN Board Meeting	Aaron begins work on budget, brings questions to SWAN Board if needed.
November [TDB]	Finance Committee	Aaron Skog and Treasurer review Budget; SWAN potential policies are reviewed.
Friday, November 20, 2026	Regular SWAN Board Meeting	Board accepts financial audit. Aaron to bring budget draft; Board discuss Fees and determines next steps.
Thursday, December 3, 2026	Quarterly	Announce budget process.
Friday, December 18, 2026	Regular SWAN Board Meeting	Review of budget draft.
Friday, January 23, 2027	Regular SWAN Board Meeting	Review and recommend draft of SWAN Budget for Membership presentation. Set COW date for February for membership review.
January 2027 [TBD]	SWANcom	Aaron Skog/Board announcement of draft budget to membership. Announce February COW date and possible location of meeting.
February 2, 2027	COW Membership Meeting	Meeting to discuss budget, fees, and reserves worksheet.

DATE	MEETING TYPE	ACTION ITEMS
Friday, February 19, 2027	Regular SWAN Board Meeting	Incorporate changes and suggestions to SWAN budget. Create recommendation to membership.
Thursday, March 4, 2027	Quarterly	Roll call vote to approve SWAN budget.