SWAN 2025 Projects

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

Disaster Recovery Plan – January 2025

Scott Brandwein, Assistant Director

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

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

HaloITSM Launch – Ongoing through April 2025

Scott Brandwein, Assistant Director

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

Novelist Select Sunsetting – Ongoing through March 2025

Aaron Skog, Scott Brandwein, Tara Wood

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

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

Cybersecurity Assessment and Hand-off – January-February 2025

Ian Nosek, IT & Systems Support Manager

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

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

Environmental Scan Task Force – Ongoing through February 2025

Aaron Skog, Executive Director

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

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

Website Redesign – Ongoing through March 2025

Tara Wood, User Experience Manager

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

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

Training Strategy – Ongoing through March 2025

Scott Brandwein, Tara Wood

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

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

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

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

LiDA Self-check Pilot & Launch – Delayed

Tara Wood, User Experience Manager

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

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

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

Single Sign-on Phase 1 – Ongoing through March 2025

Ian Nosek, IT & Systems Support Manager

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

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

Aspen Series Development with Grove – January-March 2025

Scott Brandwein, Tara Wood

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

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

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

Entra & InTune Policies – January-April 2025

Ian Nosek, IT & System Support Manager

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

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

ICOLC Planning – January-May 2025

Aaron Skog, Executive Director

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

Bibliographic Deduplication – Ongoing through May 2025

Cynthia Romanowski, Bibliographic Services Manager

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

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

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

Evaluation of 590 Decommissioning in Aspen – January-June 2025

Cynthia Romanowski, Bibliographic Services Manager

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

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

EBSCO Database Renewal – January-July 2025

Tara Wood, User Experience Manager

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

Aspen Governance Task Force – Ongoing through June 2025

Aaron Skog, Executive Director

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

Online Patron Registration – January-July 2025

Tara Wood, User Experience Manager

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

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

SWAN Expo Planning – January-August 2025

Aaron Skog, Executive Director

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

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

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

AspenCon Planning – January-October 2025

Tara Wood, User Experience Manager

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

Palace Project & Hoopla Flex Research – February-September 2025

Tara Wood, User Experience Manager

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

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

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

Learning Track Development – February-December 2025

Tara Wood, User Experience Manager

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

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

Library of Things in Aspen – March-July 2025

Tara Wood, User Experience Manager

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

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

MessageBee Training Update – April-May 2025

Scott Brandwein, Assistant Director

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

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

Infographic on Value of SWAN Membership – April-June 2025

Aaron Skog, Executive Director

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

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

Staff Development Retreat – April-September 2025

Scott Brandwein, Assistant Director

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

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

School Partnerships: Phase 2 – April-June 2025

Scott Brandwein, Assistant Director

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

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

Backstage Library Works Crossover – May-June 2025

Cynthia Romanowski, Bibliographic Services Manager

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

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

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

Performance Reviews – May-June 2025

Scott Brandwein, Assistant Director

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

HaloITSM: Phase 2 – July-August 2025

Scott Brandwein, Assistant Director

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

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

Strategic Planning – June-December 2025

Aaron Skog, Executive Director

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

Laptop Refresh – June-December 2025

Ian Nosek, IT & System Support Manager

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

SharePoint File Management Overhaul – September-December 2025

Scott Brandwein, Assistant Director

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

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