

# SWAN Services

CHANGES TO STAFF & MEMBERSHIP SUPPORT

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FOR SWAN BOARD

From Aaron Skog, Executive Director of SWAN Services

## Introduction

SWAN services will undergo an immediate change to its staffing composition and services arrangement in March 2019.

The SWAN Board has asked for a review of the SWAN organization on how member needs and projects are prioritized, managed, and shared. All SWAN staff support the membership; service to members is pervasive in all work we do.

The Board has requested a review of departmental structure with increased emphasis in areas identified through the strategic planning process:

- commitment to the patron (and staff) experience
- increased consultation, training, and documentation
- cross-functional collaboration (both within SWAN organization and throughout the membership groups)
- streamlined processes
- commitment to data integrity and automated processes
- ease of data reporting and access to actionable data
- responsive/pro-active support
- increased research and development

Following their fiduciary responsibilities, the Board has requested SWAN Management to evaluate positions as they become available, ensuring strategic priorities are addressed in staffing decisions. The SWAN salary and benefits budget for FY20 is funded at the FY19 level.

These priorities require creative solutions and a reallocation of staff to define more effective working relationships both within SWAN and with our members. The success of this plan depends greatly on the ability of SWAN staff to collaborate, work in an agile environment (assignments may shift based on projects), mentor and nurture colleagues, and work toward the common goals of our consortium.

The following transition plan will be fully implemented by July 1, 2019. Job descriptions and performance goals will be reviewed and documented before the end of FY19.

## Vision

SWAN will be arranged into four service units:

1. Administration
2. Bibliographic Services
3. Information Technology and Support Services (IT)
4. User Experience

## SWAN Administration

Your team will be made up of...

- Aaron Skog, Executive Director
  - Dawne Tortorella, Assistant Director
  - Ginny Blake, Office Manager
  - Helen Walsh Pinder, Consultant - Resource Sharing
  - Grant Halter, Data Analyst (part-time)

The addition of Grant Halter as Data Analyst will provide consortium-wide data analysis support to SWAN Administration, highlighting trends and markers for efficiency and service. This position will not be directly involved with membership support, but will help transform library data into a more standardized process across the membership.

Helen Pinder as the Resource Sharing Consultant will work closely within SWAN Administration to support processes and procedures to reconcile ILL and RB activity. Helen, Grant, and Dawne will collaborate on analyzing SWAN resource sharing.

Aaron will oversee the implementation of the organization's 5-year strategic plan through the SWAN tactical plan. The tactical plan will be reviewed quarterly.

SWAN governance and quarterly meetings will be led by SWAN Administration. The Assistant Director will continue to play a support role in SWAN Advisory and User Groups, which are led by specific service units.

## SWAN Bibliographic Services

Your team will be made up of...

- Scott Brandwein, Bibliographic Services Manager
  - Samantha Dietel, Bibliographic Services Consultant
  - Diane Nickolaou, Bibliographic Services Support Specialist
  - Claudia Nickson, Bibliographic Services Consultant
  - Angela Puckett, Bibliographic Services Support Specialist
  - Susan Stupar, Bibliographic Services Support Specialist
  - Mary Alice Buckley, Bibliographic Services Support Clerk (part-time)

The Bibliographic Services team will continue to focus on high quality original cataloging, copy cataloging and authority control on the SWAN database to ensure library materials in all formats are discoverable and accessible to customers via online catalog. The SWAN Bibliographic Services Manager and Bibliographic Services Member Consultants will be involved with planning, organizing and implementing projects related to development, oversight, and enhancement of the bibliographic data and processes, including acquisitions, cataloging, and serials.

Membership support of library Symphony Acquisitions, EDI, automated bibliographic 9XX record loading, and Symphony Serials will be supported through a coordinated effort between Bibliographic Services and IT Services.

Cataloging Advisory, Acquisitions and Serials User groups will be led by Bibliographic Services.

## **SWAN Information Technology & Systems Support**

Your team will be made up of...

- Steven Schlewitt
  - Rudy Host, Systems Engineer
  - David Pacin, Systems Administrator
  - Ian Nosek, Systems Administrator
  - Michael Szarmach, Systems Administrator
  - Victoria Totton, Consultant - Systems & Support

The department will undergo a title change to Information Technology & Systems Support. The primary responsibilities include:

- Oversight of the Library Services Platform including scheduled processes, system availability, upgrade scheduling, account creation/management, and configuration.
- Oversight of maintenance, configuration, security, and support of the server and network infrastructure.
- Liaison between client support and internal library services expertise within SWAN.
- Increased development of library platform solutions and tools.

The IT & Systems Support team will oversee the user data within the ILS, coordinating NCOA and record purge updates, periodic user and circulation record changes, and 3<sup>rd</sup> party services interaction with the Library Services Platform.

Technology and RFID user groups will be led by IT & Systems Support.

## **SWAN User Experience**

Your team will be made up of...

- Tara Wood, User Experience Manager
  - Lauren Levaggi, User Experience Specialist
  - Robin Hofstetter, Consultant - Electronic Resources
  - Crystal Vela, Consultant – User Experience

This team is responsible for facilitating user experience design and implementing/managing experience features on behalf of SWAN. Tara will lead a team consisting of web administration and internal support roles, as well as member advisory and work groups, to form an effective user experience model for the

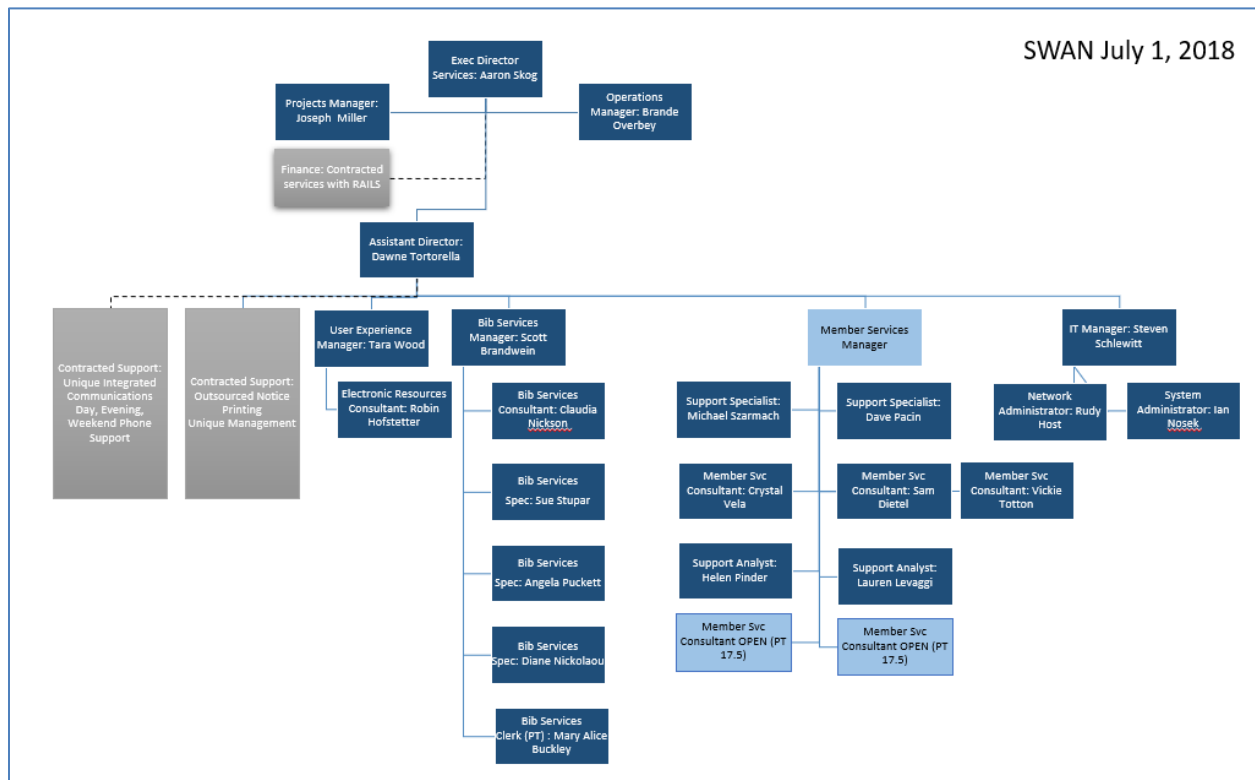
organization. The goal is to support and assist end-users-- patrons and staff-- in use of SWAN services. This includes interface design, training, outreach, and curriculum development, including web and video-based instruction and support.

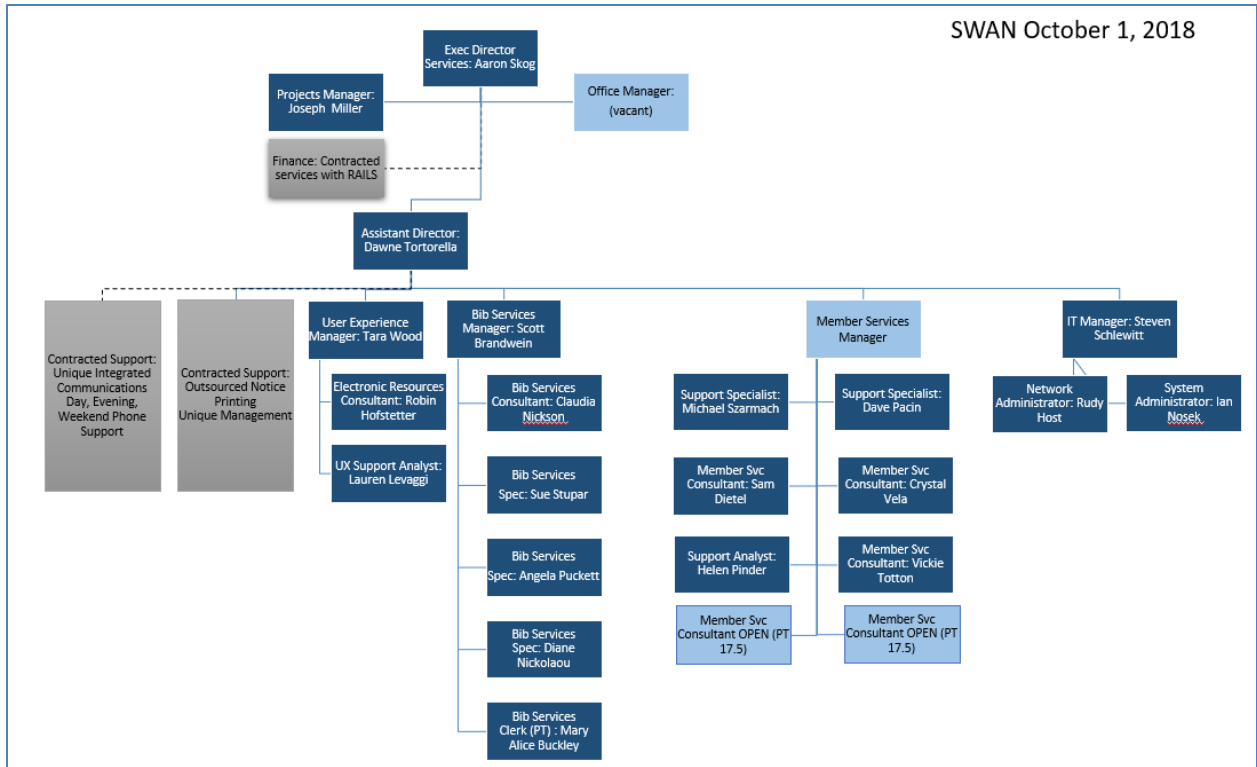
Circulation, Outreach, and Discovery & User Experience advisory groups will be led by User Experience.

## SWAN Organization Chart

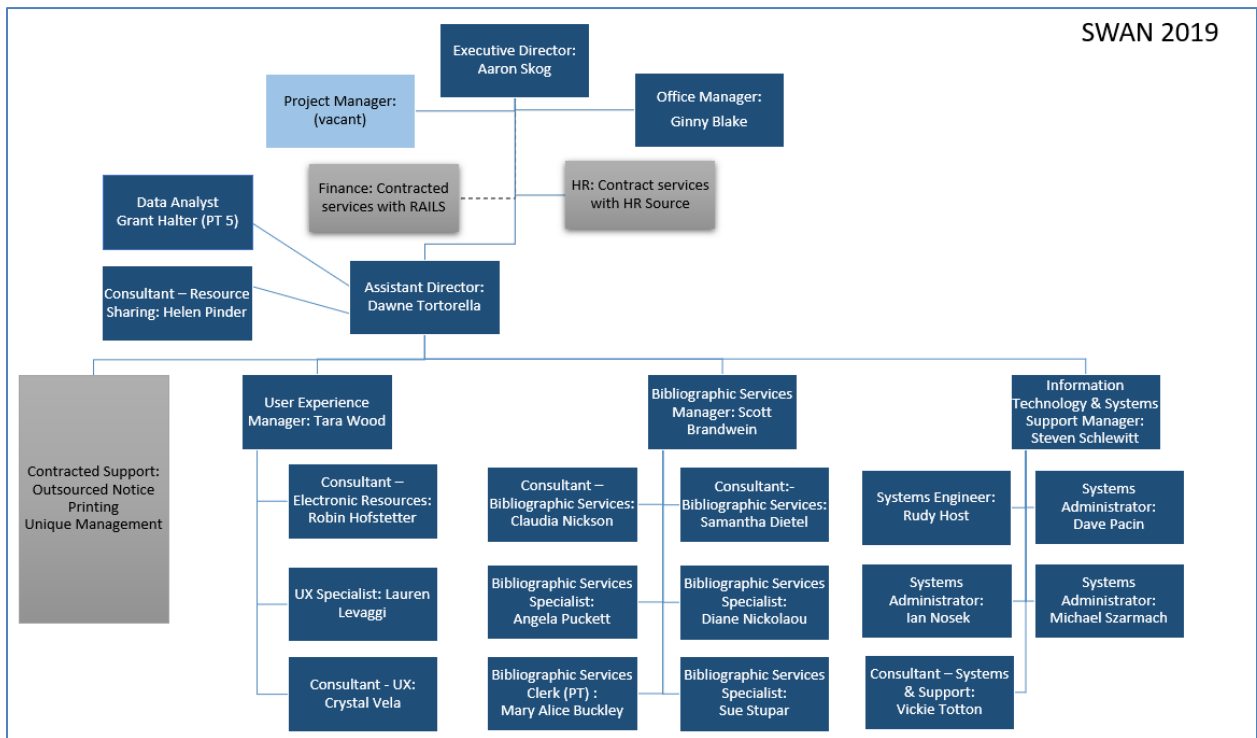
The organization has taken steps towards the staffing plan goal.

Below is the chart mid-last year.





Our organization as of March 2019 will be structured in the following arrangement, fully implemented for FY20.



# Key Areas of Responsibility

User Experience	Bibliographic Services	Information Technology, Infrastructure & Support	Shared
<ul style="list-style-type: none"> <li>• Patron experience/interaction</li> <li>• OPAC</li> <li>• eRC</li> <li>• EDS/Article Search</li> <li>• Mobile</li> <li>• Staff efficiencies and interface with applications (Staff Experience)</li> <li>• Symphony Workflows</li> <li>• BLUEcloud Circ</li> <li>• OCLC WorldShare</li> <li>• Holds Management (user facing)</li> <li>• Web Sites &amp; Content Management</li> <li>• Usability Research</li> </ul>	<ul style="list-style-type: none"> <li>• Cataloging Standards</li> <li>• International</li> <li>• State-wide</li> <li>• SWAN</li> <li>• Management of shared catalog</li> <li>• Holds Management (data/config)</li> <li>• Policy Management (e.g. Location, Item Types, Holding Codes)</li> <li>• Serials</li> <li>• Acquisitions</li> <li>• Vendor accounts</li> <li>• Authority Control</li> <li>• OCLC Holdings &amp; Scoping</li> <li>• PCC Certification</li> <li>• Bibframe Research</li> </ul>	<ul style="list-style-type: none"> <li>• Technology Infrastructure</li> <li>• SWAN Membership</li> <li>• SWAN Organization</li> <li>• Networking and VPN management</li> <li>• 3<sup>rd</sup> party vendor integration</li> <li>• Vendor negotiations</li> <li>• Security</li> <li>• Account management</li> <li>• Reports &amp; Scheduling</li> <li>• Policy configurations</li> <li>• Support – 1<sup>st</sup> line of support</li> <li>• Api management &amp; development</li> <li>• Web Services</li> <li>• Participation in Open Source Community</li> </ul>	<ul style="list-style-type: none"> <li>• Projects (including Migrations)</li> <li>• Facilitation of Users Groups, including cross representation</li> <li>• Announcements and news to membership</li> <li>• Training &amp; Documentation</li> <li>• Member engagement/site visits</li> <li>• Member support</li> <li>• Reporting and analysis of data to support decision making</li> <li>• Professional Development</li> <li>• Targeted R&amp;D</li> </ul> <p>Assistant Director</p> <ul style="list-style-type: none"> <li>• Quarterly Billing</li> <li>• Data Analysis</li> <li>• Resource Sharing</li> </ul>

## Background Information on the Position Changes

### Goals of the FY20 Budget

The personnel budget was not increased, therefore unfilled positions will remain as such. No staff benefits were changed within the FY20 budget. We expect to complete the annual review and merit process in the same timeframe of June/July 2019. The strategic alignment of staff and positions will enable continued merit increases based on performance.

### Position Descriptions

All positions in SWAN were examined and either revised or newly created in some instances. These descriptions are being independently evaluation by HR Source. The determination of FLSA exempt or non-exempt will be made independently by HR Source. The positions will be benchmarked and graded within SWAN’s existing pay grade bands. HR Source expects the work to be completed sometime in the May-June timeframe. While some positions may be graded differently than current positions staff hold, we do not anticipate any reduction in pay grade for individuals moving into revised positions.

### Project Management

SWAN will undertake project management through the management team. Steven Schlewitt is completing project management certification sponsored by SWAN. The Project Manager position will remain unfilled.

## **Cross Functional Teams**

SWAN will continue to assign cross-functional project teams for major projects, as well as continue and enhance our internal working teams. These teams include: Acquisitions (including SirsiDynix Strategic Partner), Analytics, API, and management working teams. A Consultants team will be added to facilitate cross-departmental problem-solving and surfacing of priorities. Teams will have monthly formal meeting times and will track topics/work within Asana.

## **Research & Development**

To meet the needs of the organization and our SWAN membership, increased research, learning, and development efforts are required. Design research, metadata, data analytics and visualization, and application development - including open source represent areas we will be pursuing. This research and development activity will inform projects and directions outlined in the SWAN Strategic Plan.

## **Performance Goals**

The performance evaluation of all staff will undergo some changes starting July 1, 2019. We have updated the Cultural Competencies shared by all positions. Each position has a set of Key Responsibilities which has been aligned with position descriptions. The personal development plan rating guide has undergone some revision. Each evaluation includes a new section "Additional Feedback from Department Managers" where other department managers will provide written feedback on any projects staff have been involved with across the organization during the past review period.

All staff will be reviewing with their previous/new manager the Personal Development Plan/Performance Evaluation template. An individualized document has been created for each employee which highlights goals for the period July 1, 2018-June 30, 2019. Managers and employees have until April 30, 2019 to finalize the FY19 Personal Development Plan used for evaluation in June, 2019.

## **Transition to New Reporting Structure**

New teams will be formed the week of March 11<sup>th</sup>. Managers are working to get all staff together to discuss transition and launch new initiatives. Timesheets due on Friday, March 15<sup>th</sup> should be submitted to the same person you submitted the prior timesheet. Effective, Monday, March 18<sup>th</sup>, all requests for time off and timesheet approval needs to be coordinated with your manager as reflected in the final organization chart listed above. We will continue to work on shared projects crossing departmental reporting structures and work together to assure a smooth transition.