

SWAN Services Executive Director Self-Evaluation

Director: Aaron Skog

Hire Date: October 2008

Review Period:

1 month

3 month

6 month

Annual

The SWAN Executive Director Goals for 2015 were the following:

- 1. Manage implementation of SWAN Strategic Plan, year-3**
 - a. Create more awareness of SWAN's services within membership**
 - i. Visit SWAN member libraries regularly**
 - ii. Engage new library directors as they join the SWAN consortium**
 - b. Build new services and features for SWAN libraries**
 - i. Plan and implement post-migration services and features**
 - ii. Engage SWAN libraries in a study of centralized consortia services (Strategic Plan Goal #5), with a focus on cost-benefit analysis of member needs**
- 2. Lead SWAN planning for ILS migration**
 - a. Develop process for ILS configuration and data migration**
 - b. Engage member libraries in ILS training**
 - c. Build a robust infrastructure for integrated access to electronic content, resources, and providers (Strategic Plan goal #3)**
- 3. Create or adjust staff positions within SWAN**
 - a. As required with the ILS platform recommendation**
 - b. As needed for succession planning**
- 4. Add new libraries to SWAN consortium**
 - a. Plan for 2016 implementation of anticipated libraries Lansing and Franklin Park**
 - b. Build promotional material of services available**

Major Accomplishments of the Review Period

Manage implementation of SWAN Strategic Plan, Year-3

The 2013-2015 Strategic Plan was presented to the SWAN membership at the 2013 September Quarterly meeting. Goals set by the SWAN Board for my position as Executive Director for the past year included:

Create more awareness of SWAN's services within membership

The 3-year SWAN strategic plan contains a major strategic initiative to “Create Engagement with SWAN: to make all SWAN members fully engaged participants.”

Since October, I have presented to libraries about what services are available within SWAN, particularly when the new ILS opens up new ways of providing services.

Under my leadership, SWAN added events which are streamed live to libraries. SWAN created a YouTube channel for instructional videos, using Camtasia screen recorder software to add professional appearance to the presentation. The [YouTube channel](#) has public and private video feeds, which allows instruction to library patrons or library staff depending on need. Libraries express interest in SWAN providing more remote, self-guided options, which we now provide with ease.

In March of this year, I presented a new position to the SWAN Board for the SWAN Library Relations Manager. This position will ensure that SWAN will have active promotion of its services and solution within its libraries.

Visit SWAN member libraries regularly

Throughout the September 1, 2013 to October 31, 2014 review period, I visited 14 SWAN libraries, and held membership meetings at three libraries. I visited 5 more after that period up to the April 14, 2015 migration go-live, for a total of 19 libraries.

Develop overview for new library directors and those which have joined SWAN in the last two years

This goal was completed with the creation of a SWAN orientation program. The first of what will be ongoing orientation events was held after the September 4, 2014 Quarterly Meeting. The orientation provided:

- History of SWAN
- Overview of SWAN services
- Introduction and overview of the SWAN directors area of the website

The event was attended by directors and managers from 14 SWAN libraries.

Moving forward I will track changes in library leadership within the consortium, and arrange introductory visits on behalf of SWAN, utilizing a standing Ambassador Committee to assist with the peer-to-peer networking.

Lead SWAN planning for ILS migration

Develop process for ILS configuration and data migration

The ILS migration was completed on-time as planned. This was a 10 month project

Throughout those 10 months, I outlined the migration plan to the SWAN membership, delivering updates on the various teams and key decisions made as we progressed. The plan included the creation of the following teams and delegating responsibility to individual SWAN employees:

- **Migration Team:** nine key SWAN personnel including Brande Redfield, Dave Pacin, Karen Bar, Kate Boyle, Rebecca Malinowski, Renee Clanton, Samantha Dietel, Steven Schlewitt, led by Aaron
- **Training Team:** 8 library staff & SWAN staff, led by Kate Boyle
- **User Experience Team:** 3 library personnel & SWAN staff, led by Rebecca Malinowski, responsible for the catalog search and display, integration with online resources, and will provide feedback on staff training
- **PR Team:** 6 library personnel & SWAN staff, led by Brande Redfield
- **Financial Services Team:** responsible for the e-commerce and financial services options for library patrons, led by Aaron Skog, which will include SWAN Board representation, RAILS Finance, and SWAN staff

I approached the four SirsiDynix consortia within Illinois for consultation and feedback on the configuration of Symphony and Enterprise. This allowed SWAN teams to work directly with experts in appropriate areas to make the best decisions possible.

Engage member libraries in ILS training

SWAN trained around 1,900 library personnel. Transition to the new ILS and search platform required the understanding and commitment of library staff and resources. SWAN arranged training at many locations for the convenience of library employees.

I have made use of the migration to build relationships. The Ambassador Program identified that SWAN must pay closer attention to the needs of our college and special libraries within our dominant public library group. We involved the two special libraries (Morton Arboretum and Brookfield Zoo) and two colleges (Prairie State College and South Suburban College) early within the migration process, which has created higher engagement and appreciation for SWAN than has existed in the past.

Build a robust infrastructure for integrated access to electronic content, resources, and providers (Strategic Plan goal #3)

The ILS selection process incorporated this major goal from the SWAN strategic plan. SWAN libraries now have the following:

- A variety of e-book providers integrated into the library catalog
- Automatic synchronization of e-book collections (no more record batch loads)

- Patrons able place holds on e-books, checkout titles, and check-in titles within their online accounts

Work continues to integrate searching of articles and online databases within the catalog. As a result of our partnership with SirsiDynix, SWAN will have a solid foundation to integrate additional 3rd party services and resources moving forward beyond the April 2015 go-live.

Create or adjust staff positions within SWAN

As SWAN moves into its fourth year of having its own employees, some adjustments have been made to improve its services. I made sure to gather feedback from managers on open positions to determine the skills required and salary ranges.

As required with the ILS platform recommendation

The SWAN Strategic Plan recommended a “Research & Development” position be created. This position was budgeted for in the FY14 and FY15 budget and the position description approved by the SWAN Board. I recommended that the position remain unfilled until the conclusion of the migration in April 2015.

Based on the success of the migration PR Team and the SWAN Ambassador program, Brande and I developed the “SWAN Library Relations Manager.” This position was presented and approved by the SWAN Board at its March 2015 meeting.

I will also begin to discuss with the SWAN managers some of the needed changes within their departments, which stem from changing the 15 year use of Millennium ILS software.

As needed for succession planning

The past year was an important turning point for SWAN. The reorganization of SWAN services starting in 2010 eliminated five positions, combined two departments to create Member Services, and created the IT Manager position. Of the twenty-one staff originally employed by SWAN in 2008, twelve of the seventeen positions are new employees to the organization. SWAN is much more customer focused, empowered for rapid decision making, skilled at project management, much more adept at library technology, and most importantly open to new ideas.

What job skills or abilities have you developed or enhanced since your last performance review? What educational/developmental classes, events, workshops, etc. have you attended?

Within Review Period

New Skills

I have managed and completed a successful consortium migration.

Educational

None during this period.

Top Goals/Objectives for the Upcoming Review Period

(See page 1 of this document for prior goals)

For July 2015- June 2016, I propose the following goals.

1. Oversee Strategic Plan for SWAN: coordinate process with SWAN Board, staff, and membership. Outline personal vision for where SWAN should be in three years.
2. Serve on SWAN Futures Task Force and create a recommendation with the Task Force on the following goals, which are with other Illinois consortium to find:
 - a. Increased resource sharing
 - b. Improved services to patrons
 - c. Greater economies of scale
 - d. Greater strategic and operational effectiveness in the provision of library services
3. Create more awareness of SWAN's services within membership
 - a. Visit SWAN member libraries regularly
 - b. Engage new library directors as they join the SWAN consortium
4. Build new services and features for SWAN libraries
 - a. Plan and implement post-migration services and features
 - b. Engage SWAN libraries in a study of centralized consortia services (previous Strategic Plan Goal #5), with a focus on cost-benefit analysis of member needs
5. Lead SWAN adoption of SirsiDynix solutions outlined in 5-year agreement (2014-2019)
 - a. Build a robust infrastructure for integrated access to electronic content, resources, and providers
 - b. Engage member libraries in adoption of new software solutions
 - c. Create structure for SWAN library staff to participate in SirsiDynix Strategic Partner Program, which will allow SWAN to directly affect the design of ILS software

6. Create or adjust staff positions within SWAN
 - a. As required with the ILS operations
 - b. As needed for succession planning
7. Add new libraries to SWAN consortium
 - a. Plan for 2016 implementation of anticipated libraries Lansing and Franklin Park
 - b. Build promotional material of services available

Areas of Job Performance Strength:

- Engaging a broader audience
- Hiring staff for a “new” organization which began anew in 2012
- Writing and presenting technical concepts to a wide audience

Areas of Job Performance Needing Attention:

- SWAN Research & Development Position
- Ensuring work-life balance and utilizing all vacation time

What can SWAN Board do to help you perform your job duties effectively?

- Continue to support organization staff position changes as needed
- Prepare strategic plan year-3 conclusion and subsequent plan
- Engage in the RAILS Consortia Futures subcommittee and resource sharing efforts as a result of the RAILS Consortia Committee

Board President Signature: _____ Date: _____

Summary or Additional Comments:

June 2015 Review

Executive Director Signature: _____ Date: _____

Summary or Additional Comments: