

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 2014 are as follows:

- 1. Manage implementation of SWAN Strategic Plan, year-2**
 - a. Co-chair ILS Search Committee**
 - b. Create more awareness of SWAN's services within membership**
 - i. Visit SWAN member libraries regularly**
 - ii. Develop overview for new library directors and those who have joined SWAN in the last two years**
- 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)**
 - d. Complete SWAN ILS network transition for shared data center**
- 3. Create or adjust staff positions within SWAN**
 - a. As required with the ILS platform recommendation**
 - b. As needed for succession planning**
- 4. Continue participation on Illinois State Library Committee on the Future of Resource Sharing and the RAILS Consortia Committee through 2014.**

Major Accomplishments of the Review Period

Manage implementation of SWAN Strategic Plan

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:

Co-chair ILS Search Committee

The SWAN ILS Committee was formed in October 2012 and held its first meeting November 8, 2012. It concluded its 15 months of work with a presentation to the SWAN Board in February 2014.

I would describe the process SWAN used as “textbook.” I co-chaired the search with an emphasis on broad participation from library staff at all levels.

- The ILS Committee was made up of volunteers selected from various areas of library service
- Our selection process used 50 library staff at the peak of the search process
- Used the 2013 ALA Conference in Chicago to meet with seven ILS vendors over three days
- Hosted a social event to meet library staff from various consortia that work with these vendors
- Hired an ILS search consultant to create and issue the request for proposals
- Used the ILS Committee and RFP to remove all vendor bias during the scoring rounds
- Hosted six days of vendor software demonstrations, gathering library staff feedback throughout the sessions and incorporating that feedback within the ILS Committee
- Used the competitive selection process to gain a high set of software features and options for the SWAN consortium at a lower cost
- Issued a written recommendation to the SWAN Board and member libraries
- Presented the proposed agreement at the March 2014 Quarterly meeting and achieved unanimous approval

Co-chairing the ILS Committee was a major focus during the first half of this review period. The ILS Committee met every two weeks, and from August through February I held weekly phone calls with our RFP consultant, Rob McGee of RMG Consulting.

Contract Negotiation

The contract negotiation began in February 2014 and concluded with the signing of a five-year agreement at the April SWAN Committee of the Whole.

The ongoing cost for the entire package offered by SirsiDynix is lower than what SWAN currently pays with Innovative Interfaces. The proposed agreement locks SWAN in a zero (0)% increase for the 5-years of the agreement.

222,875	SirsiDynix Annual Maintenance to SWAN (Years 2-5)
	Zero % Maintenance Increases for 5 Years
279,748	Current ILS Annual Maintenance to SWAN with III
69,600	Annual Application Management Service with III
349,348	Total Current Annual Maintenance

**126,473 Annual Savings in SWAN Operations Budget Line #5400
"Equipment Repair & Maintenance Agreements"**

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.”

The ILS search set a foundation for ongoing engagement with member libraries. The use of task force groups with member library personnel during our six days of software demonstrations allowed direct participation in the selection process.

Since April, 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.

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.

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 search and contract negotiation was a combined effort of SWAN Board representatives and the Executive Director. The next phase is a major responsibility of the SWAN Executive Director.

I outlined the migration plan for the SWAN membership at the May COW. 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:** 7 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 will train around 1,800 library personnel. The training plan created builds upon a solid foundation that SWAN has established over the past six years under my leadership.

- The huge success of the 2012 Circ du SWAN training program established a core team of trainers and library sites to host training events.
- Testing and piloting new features with key libraries and personnel who are ideal for needed functionality was built up through established SWAN ILS Task Force Groups and user group meetings.

Transition to the new ILS and search platform requires the understanding and commitment of library staff and resources. For the last six months I have ensured this through presentations and meeting with library staff and management teams. Other SWAN staff members have continued to meet directly with library personnel through the Cataloging User Group, Circulation Manager Zone Meetings, Circulation Advisory, and the Technology User Group.

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 have since 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. When the ILS migration is completed in April 2015, SWAN libraries will 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 will place holds on e-books, checkout titles, and check-in titles within their online accounts
- Integrated search for online resources EBSCO, Gale, and many others

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.

Complete SWAN ILS network transition for shared data center

The challenge of preparing SWAN to become more flexible with its services required that we make extensive changes to the design of our network. The changes to the SWAN network were completed in April 2014. This year long process used a series of incremental steps to allow problems encountered to be isolated and resolved quickly. The IT Manager Steven Schlewitt did a remarkable job taking over a project I had started, and completed the network transition.

Goals achieved through this transition:

- Separated the SWAN network from the RAILS network
- Designed the SWAN network with more flexibility if SWAN were to move its servers to a different data center of its own choosing
- Server data is archived and replicated digitally through off-site storage in the Illinois CMS datacenter in Springfield, Illinois; all tape backup has been eliminated which allows for quicker restoration and resolution of issues should a backup be required

Create or adjust staff positions within SWAN

As SWAN moves into its third 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.

The Office Manager position was filled in February 2013 by Brande Redfield. With Brande's assistance, the open IT Manager position was filled in August 2013. During the 2013-2014 review period two employees retired. A new Bibliographic Services Manager and Special Projects Coordinator were hired.

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 budget and the position description approved by the SWAN Board. This included a grade recommendation from the Management Association. The search for candidates for the position began in February 2014. While a number of candidates were interviewed, it became apparent that the position of Research & Development would have to be re-evaluated. I recommended that the position remain unfilled until the conclusion of the migration in April 2015.

As needed for succession planning

From 2010 through 2013, I performed all SWAN IT Manager duties, due to a combination of RAILS not filling the open position and then the 2012 transfer of RAILS SWAN LLSAP employees over to the new SWAN organization July 1, 2012. The IT Manager Steven Schlewitt was hired August 2013. Steven has assumed all SWAN IT duties. Together, we have assessed the IT needs for SWAN, and concluded that SWAN should increase the IT capacity of its staffing footprint. The IT System Administrator position was approved by the SWAN Board in September 2014 and the position search is underway.

Moving forward I will continue to plan for other possible retirements within the SWAN organization, readying the position descriptions for possible changes and Board action if those changes are significant.

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.

Continue participation on Illinois State Library Committee on the Future of Resource Sharing through 2013

FORSC Subcommittee of the Illinois State Library Advisory Council

The Future of Resource Sharing Committee has not met during this review period.

RAILS Consortia Committee

The RAILS Consortia Committee involves representation from both the SWAN Board and the Executive Director. The charge of the RAILS committee is to investigate the options for a resource sharing “overlay” that would bridge the consortia and cooperatives within RAILS. I am participating in a “working group” subcommittee within this committee. We have completed two RFP processes for consultants during the past year. The working group will continue to meet and present information to the Consortia Committee, which I anticipate will include recommendations for resource sharing software and its configuration.

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 RFP process for ILS procurement.

Educational

None during this period.

Top Goals/Objectives for the Upcoming Review Period

(Please attach a copy of your current year’s goals.)

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

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
- Hosting a talk show

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:

Executive Director Signature: _____ Date: _____

Summary or Additional Comments: