

# 2008-2011 TECHNOLOGY PLANNING CRITERIA FOR PUBLIC LIBRARIES

## CRITERIA I: PLANNING AND NEEDS ASSESSMENT

- **Organization Leadership and Technology Planning Committee**

The purpose of this section is to identify the decision-making organization of the public library entity. This includes identification of the public library sponsor or technology advocate such as a technology coordinator, or library administrator and how technology decisions are typically made. Another recommended component in technology planning is the engagement of stakeholders through a technology planning committee that is actively engaged in technology planning and implementation strategy.

For public libraries, MDE recommends the following representation on the Technology Planning Committee:

- Administrators
- Public library staff
- Public library customers
- Trustees
- Library Friends
- Elected Officials

### **GUIDING QUESTIONS FOR PUBLIC LIBRARIES:**

- a. Who are the individuals that make technology decisions or serve as the technology “champions” for the public library?
- b. Do you have a Technology Planning Committee? If so, do representatives include the public, public library trustees, public library friends, elected officials, or public library staff? How often does the Committee meet? If your organization does not have a Technology Planning Committee, what other structure is in place for technology planning and implementation?

Carver County Library has a Technology Management Librarian (TML) who serves as the point person for communicating library technology needs to all internal customers. This individual is charged with presenting technology plans to groups that have a voice in technology decision making including:

- Library Director-meets regularly with Library Director to discuss technology issues including priorities and budget issues.
- Library Board – provides updates to Library Board technology initiatives as requested.

- Library Management Team - the internal decision making group for the library. TML is a member of this group, and provides updates at each meeting. Group meets quarterly.
- Carver County Library Information Services Staff (IS) – the library does not have its own network administrator, but rather uses the services provided by Carver County Library servers are located and maintained by IS staff who are also involved in purchasing, installation and maintenance of library hardware and software.
- Carver County Library staff – TML is involved in communicating technology plans to all library staff. This communication is undertaken in many different ways including presentations and updates at staff training days, informal training sessions on specific technology issues, and e-mail communication for Help Desk type issues.(fix this)

Our Technology Planning Team consists of library staff, IS staff, and a library board member. Our group has been in existence since 2004, meeting 1-2 time each year to review progress and make adjustments to the current Technology Plan. Our current team includes:

Library Staff – Director, Assistant Director, Librarian, Circulation Supervisor,  
 Webmaster, Technology Management Librarian  
 Information Services – Department Head, Senior Analyst  
 Member of the Library Board

In addition, this year we have contracted with a library consultant to help us finalize our 2008-2011 Technology Plan and meet with our Technology Planning Team to help us develop a technology vision, set goals and objectives, and develop a road map for meeting these goals.

- **Demographics of Public Library**

Please provide some information relating to the size of the public library service area and identify demographic factors that may influence the direction of the technology plan. This will also help technology plan reviewers have a better sense of your organization and the scope of your plan.

### **GUIDING QUESTIONS FOR PUBLIC LIBRARIES**

- a. What is the service area size of your public library system or regional public library?
- b. Where are you located?
- c. Are there specific challenges in terms of library service delivery that you face because of your location or size?
- d. Have there been significant changes in the demographics of your regional public library customers within the last three years? If so, describe these changes.

- e. Have you planned for the need for accessible technologies for individuals with unique needs?
- f. Are there specific challenges in terms of library service delivery that you face because of any changes in the demographics of your regional public library system or public library customer populations?

Carver County has 11 cities and 11 Townships with five libraries (Chanhassen, Chaska, Norwood Young America, Waconia and Watertown) serving the residents of those cities and townships. Carver County also has a Law Library at the Carver County Government Center and Administrative Offices in Chaska. We are located on the western edge of the Twin Cities metro area.

2006 circulation was 728,965. Customer initiated circulation (online holds and renewals and telephone renewals) was nearly 100,000 in 2006 representing 13.2% of total circulation. The % to total circulation for customer initiated circulation continues to increase, and we do not anticipate a change in this trend in the next few years as we continue to provide customers with tools and access to manage their library information.

Our current population is estimated at 88,000. Carver County projections indicate major growth in the next 10 years. Roadway improvements, infrastructure, and new housing will fuel the growth. The projected population for 2010 is 96,000, with a projected population of 141,000 in 2030. This growth is reflected in our technology plan budget including the possibility of an additional library and the accompanying need for hardware and software in any new or remodeled library.

As with many other libraries, we face challenges in delivering services to county residents. Based on our size, many technology initiatives represent a significant investment for us and have an unfavorable ROI. However, they are services that residents have requested and are services that we would like to provide. We also most of our funding from Carver County, and like other departments, must be able to justify our need for additional funds. And, we must balance technology investments with other library priorities including staff and collection.

We have seen a population growth of people of Hispanic origin, particularly in our Chaska service area. This represents both a challenge and opportunity for us to provide library services to these and other immigrant populations. This would include but is not limited to improvements in collection and access to the collection, and links to Spanish resources (for example, Spanish language newspapers) through our website.

We are not at the level we need to be at in providing services to individuals with unique needs. We will dedicate funding in 2008-2011 to provide library services to meet accessibility needs of all library users. For example, the ability to change screen resolution on public pcs, providing headphones with adjustable sound, having screen magnifiers available if needed.

In the case of both providing library services to immigrant populations and adaptive technology, we will work with our County Demographer to analyze trends and projections so we are able to provide library to all County residents.

- **Needs Assessment**

Conducting a needs assessment involves identifying the technology needs of the organization and its stakeholders. For a start, progress towards needs identified in the previous technology plan should be evaluated. There are many forms of needs assessments. Public libraries should choose a method that meets local needs, whether it is a survey process involving public library customers and staff, or a more formalized process. In this section, please discuss the method of needs assessment used and summarize some of the key results that are influencing your planning decisions.

**GUIDING QUESTIONS FOR PUBLIC LIBRARIES:**

- a. What type of needs assessment did you conduct to develop this technology plan?
- b. What were some of the critical components of your needs assessment?
- c. What were some of the key results of your needs assessment?
- d. Who participated in the needs assessment?
- e. When was the needs assessment conducted?

Carver County Library is currently revising our Strategic Plan. The new Strategic Plan will be completed later this year. As part of this process, we hired Decision Resources to conduct a survey of Carver County residents. 400 randomly selected residents were contacted by telephone in December 2006 and January 2007.

Some of the key findings from the responses concerning technology are listed below

- 26% of respondents had accessed our website
- 66% had a positive response about technology in our libraries
- 74% are at least somewhat like to use self service to check out their own materials
- 40% were either very likely or somewhat likely to use a debit for overdue fines, copy and printing, etc.
- When told that Carver County Library was considering implementing an all-purpose "Smart" card, 40% said they would be very likely or somewhat likely to use the new card.

Specific responses to Internet based services are listed below

- 90% of respondents report access to the Internet either at work or home.
- 31% had accessed our website within the past year.
- 66% say their use of the Internet has not caused any change in their library visits
- 68% have renewed books on line and 69% have reserved books on line.
- 45% receive e-mail notification of books due or on hold
- 33% have used library databases online.

- 29% are either very likely or somewhat likely to use an e-mail service that would provide information on new books, library event and programs.
- 11% are somewhat likely to use a service that would allow them to customize their own Carver County Library web page.
- 24% report awareness of free high-speed wireless access at Chanhassen, Chaska and Waconia.

The survey results have been woven into our Technology Plan.

## **CRITERIA II: VISION, GOALS, OBJECTIVES AND STRATEGIES FOR TECHNOLOGY**

The vision, goals, objectives, and strategies for technology to improve delivery of education programs or public library services are the cornerstone of the technology plan and should be based on the results of the needs assessment. It is recommended that schools and public libraries establish realistic goals that reflect expected resource levels and service objectives for the next four years. This may include new programs or services to be delivered through technology, improvements in existing programs, and new trends in using technology for delivery of education or public library services that are impacting your organization.

The Department of Education sees the following topic areas as the core foundations for use of technology in education and public libraries based on what we know of school and public library practices and federal requirements. Technology plans should address goals, objectives, and strategies in these areas. Schools and public libraries may have additional areas of focus that may be added.

1. Delivery of Services
2. Increase/Improve Technology Access
3. Administration
4. Professional Development

### **GUIDING QUESTIONS FOR PUBLIC LIBRARIES**

- a. Public libraries often have vision and mission statements regarding the general mission of the organization. How does your vision for technology support your overarching vision and mission for staff and customers in your libraries?
- b. What is the vision for technology in your regional public library system or public library?
- c. What are your specific goals, objectives and strategies for technology within the appropriate categories outlined above based on the results of your needs assessment?
- d. Does your regional public library system or public library plan to provide staff or customers with access to courses delivered on-line or through a distance learning technology such as interactive television (ITV)? What groups of staff and customers will be served by these programs?
- e. What gap, need, or problem is addressed by using online or distance learning technology?
- f. Does your regional public library system or public library plan to provide materials in on-line or digital formats? What groups of staff and customers will be provided with access to these resources?

- g. Does your regional public library system or public library administrators use tools for data-driven decision-making? Which ones?
- h. Do you currently use technology to communicate with public library customers? How do you do this?
- i. What are your goals and strategies for ensuring that staff in the public library have access to the training they need to effectively use the technology that will be put in place?
- j. What other strategies are you considering in these areas?

#### Mission Statement

*Carver County Libraries connect people with information resources and services by anticipating and responding to changing community needs.*

#### Vision Statement

*Carver County Libraries inspire intellectual curiosity and facilitate lifelong learning and empower effective decision making through professional expertise, material and electronic resources*

Our technology plans for the next three years will address these statements in several ways

#### Increased access to information resources and services through

- Additional and more reliable access in libraries through additional bandwidth
- Improvements in delivery of electronic resources for all customers
- Adaptive technology tools in libraries
- Website as a portal for library account management and library information
- Website as a tool to reach immigrant populations

#### Responding to changing community needs

- As Carver County continues to grow, we will provide additional access, hardware and software to meet the information needs of residents.

#### Empower effective decision making through professional expertise, materials and electronic resources.

- Provide training for staff so they are able to do their work and be confident in providing technology assistance to library customers
- Based on feedback from Decision Resources survey that over 90% of respondents have access to the Internet either at home or at work, we will continue to improve our library website and online catalog to ensure that the library is available to all County residents anytime they need it.

Our goals and objectives are listed on the next page.

<b>Goal</b>	<b>Adequate Bandwidth</b>
<b>Objective</b>	<b>Provide adequate to provide services requested by library staff and customers</b>
<b>Activities</b>	<i>Analyze bandwidth semi-annually and increase as industry standard saturation points are reached in order to ensure adequate response times for customers and staff. Work with providers to provide services in most cost effective means available.</i>

<b>Goal</b>	<b>Standardize Library Hardware/Software</b>
<b>Objective</b>	<b>Library Network Consistency</b>
<b>Activities</b>	<i>Plan pc replacement based on pc image and replace all on rotating basis. Automate process of updating software on library pcs. Create consistent vehicle for library staff to report technology issues in order to ensure timely response and identify systemic problems. Offer wireless service in all libraries.</i>

<b>Goal</b>	<b>Staffing</b>
<b>Objective</b>	<b>Provide adequate staffing to manage library network, ILS, website, and hardware and software.</b>
<b>Activities</b>	<i>Analyze network and technology twice each year to determine staff time needed for implementation of upgrades to ensure there is adequate staffing levels to perform tasks. Investigate contract services as appropriate.</i>

<b>Goal</b>	<b>Staff Training</b>
<b>Objective</b>	<b>Provide staff with skills needed to perform their job and assist customers</b>
<b>Activities</b>	<i>Continue to encourage staff to attend trainings provided by Carver County on software applications. Continue to encourage staff to attend training provided by outside sources on library related issues Investigate alternative delivery of training and customized training methods - self directed learning, pre and post testing, individualized training on Library 2.0 topics Identify Technology Wizards at each location who can assist customers and train staff on troubleshooting technology issues. Continue/expand Tech Talks</i>

<b>Goal</b>	<b>Create a Technology Planning Committee Team</b>
<b>Objective</b>	<b>Involve more library staff in technology decisions and create synergy similar to other teams</b>
<b>Activities</b>	<i>Group would meet 3-4 times yearly to review progress on Technology Plan and develop new initiatives as needed Group would review requests for new hardware and software and plan implementation/training as needed</i>

<b>Goal</b>	<b>Increase Customer Self Service</b>
<b>Objective</b>	<b>Allow customers who want to manage their own library activities the tools to do so which enable staff to engage in more direct public service activities</b>
<b>Activities</b>	<i>Increase self-checkout to 90% in all libraries Investigate and purchase Innovative products that will allow customers to continue to manage their library accounts and complete library transactions on their own.</i>

<b>Goal</b>	<b>Library Service for all Carver County residents</b>
<b>Objective</b>	<b>Provide library service to all Carver County residents</b>
<b>Activities</b>	<i>Provide adaptive technology in libraries as needs are identified either by staff or consulting with Carver County demographer. Provide library service to immigrant populations as needs are identified either by staff or consulting with Carver County demographer Use website as a tool to provide information about the library to all Carver County residents.</i>

We currently use our website to communicate with customers in many ways. In 2006 we implemented Online Patron Registration and Online Volunteer Application in an effort to remove barriers for customers who want a library card or want to volunteer and are unable to get to one of our libraries. We also have an interactive Events Calendar on our website - staff provides information about upcoming library programming and events including event information, contact information and directions.

We plan to increase communication with customers on our website in two ways –

- We will participate in a Carver County's free electronic subscription service that allows visitors to receive automatic e-mail notifications when selected website information is updated. Subscribers can choose from an expanding variety of topics of interest.
- We have subscribed to Book Letters, an exciting service that enables staff to reach out to customers with high-quality e-newsletters and enhanced web services. Book Letters has information on authors and books and will help our librarians' provide information to customers without having to invest a large amount of time.

## CRITERIA III: POLICIES AND PROCEDURES

The Minnesota Department of Education strongly recommends that at a minimum, public libraries develop technology policies relating to equitable access for public library customers with exceptional needs and data and network security. An Internet Safety/Acceptable Use Policy is required for any organization that wishes to receive federal funding for Internet access through the E-rate program and Library Services and Technology Act Program (LSTA). Please attach these policies to your plan, or summarize the policy contents in your plan, or else indicate in your plan a valid URL where these policies may be accessed.

1. Equitable Access for Students or Library Customers with Exceptional Needs (strongly recommended).
2. Data and Network Security (strongly recommended and required in some cases).
3. Internet Safety and Children's Internet Protection Act Compliance (CIPA).

CIPA requires a public library to have an Internet Safety Policy that protects minors from pornography or content that could harm them. CIPA compliance is required for E-rate and the Library Services and Technology Act (LSTA) programs. Under CIPA, the Internet Safety Policy must also contain a "technology protection measure" that prohibits access to graphic images considered pornographic or harmful to minors.

In addition, social networking sites such as MySpace and FaceBook present challenges to schools and libraries in that they can impact public library customer safety and privacy if not used with discretion. Public libraries need to consider the advantages and disadvantages of allowing access to these types of tools using the public library network and equipment. See the Resources section of this guide for additional information on Internet safety and related policy issues.

In addressing policies and procedures for technology, please include copies of your policies if you wish. Copies of policies and procedures are very helpful to both MDE and to other schools and libraries because they can be used as samples/best practices to assist other schools and libraries in addressing these issues. It is also acceptable to note if the policies are posted on a web site where they are readily accessible and include the URL. **At a minimum, please make sure to show evidence that the Internet Safety Policy and "technology protection measure" based on CIPA guidelines exist by either attaching a copy, providing a URL, or outlining the contents in narrative. Your plan cannot be approved without satisfactory demonstration of compliance with CIPA requirements.**

### GUIDING QUESTIONS FOR PUBLIC LIBRARIES

- a. Do you have policies or procedures in place for the recommended areas of concern? If so, what are some of their key components?

- b. If you do not have these policies in place, do you have plans to develop them? When will they be developed?
- c. How are school staff, parents, students, and public library customers kept updated on these policies?
- d. Have you conducted a security audit of your network? How do you secure your network and safeguard the privacy of data?
- e. Have you done business continuation or disaster recovery planning for your organization?
- f. What type of assistive technology or reasonable accommodations process do you have in place for providing access to students or public library customers with exceptional needs?
- g. If your agency has a web site, has it been checked for Americans with Disabilities Act (ADA) compliance?
- h. Do you have an Internet Safety Policy that contains a “technology protection measure” to protect minors from accessing pornographic images or other activities harmful to minors?” Has this policy been discussed during at least one public hearing?

We currently do not have either an *Equitable Access for Students or Library Users with Exceptional Needs* or *Data and Network Security* policy. We do have a firewall on the library’s network for security as well as Carver County policies to adhere to privacy of data. Both of these issues will be addressed in our technology planning for the next four years.

Carver County Library has an Internet and Acceptable Wireless Use Policy that was last revised in 2005. The policy is listed on our website and can be accessed at <http://www.carverlib.org/yourlibrary/internetpolicy.pdf> This policy is also displayed in multiple locations in the libraries including at each public workstation with Internet access. We have a committee that is currently reviewing our current Internet policies and procedures. We also have an Internet Safety Tips link on our Teen page. <http://www.carverlib.org/teens/internetsafety.php>

Carver County is currently developing a Business Continuation Plan which would include the library, and our servers have been virtualized to aid with disaster recovery.

We make every effort to accommodate all customers who want to use our libraries. We do not however, have adequate assistive technology tools currently in place, and the tools we do have are low-tech. Through the MELSA Assistive Technology Interest Group, we have learned what other library systems are doing and have some good suggestions and recommendations for bring more assistive technology into our libraries. This will be a priority for us in 2008-2011.

Our website has not been checked for ADA compliance.

All library owned computers have a “technology protection measure” on them, and we are in compliance with CIPA. Our vendor is Fast Data Technology and the product is

Fast Tracker. Staff can disable/enable the filter upon request for patrons 17 and over if asked. Customers are not able to disable our filtering software without staff assistance.

**E-Rate for Public Libraries.** Public libraries who wish to be eligible for funding from the federal E-rate program to support Internet access and/or computers and other equipment used to access the Internet, must be in full compliance with the Children's Internet Protection Act by the second year of successful E-rate application.

**LSTA for Public Libraries.** Public libraries who wish to be eligible for funding from the federal LSTA program to support Internet access and/or computers and other equipment used to access the Internet, must be in full compliance with the Children's Internet Protection Act to receive LSTA funds.

## **CRITERIA IV: TECHNOLOGY INFRASTRUCTURE, MANAGEMENT, AND SUPPORT**

This section is designed to stimulate planning for the physical technology infrastructure required for the public library to deliver public library services. This includes elements of hardware, software, telecommunications services, and staff needed to support the technology infrastructure. The key elements of technology infrastructure are outlined below. Your public library may have additional items that need to be included in your technology plan based on local initiatives. Please remember that the public library technology plan needs to be reflective of services that are requested on the Form 470 used in the E-rate application process.

Please use the following question template to incorporate planning information for technology infrastructure, management, and support in the plan. Use of this template will assist MDE in identifying information in your plan that will guide decision-making in terms of technology resources libraries currently have in place. Areas to be addressed in your plan include:

- Telecommunications Capacity.
- Equipment Access for Instruction, Including Assistive Technologies.
- Equipment Access for Delivery of Public Library Services, Including Assistive Technologies.
- Average Age of Equipment.
- Replacement Schedule.
- Network and Data Security.
- Technology Platform.
- Level of Technology Staff Support.

## TECHNOLOGY INFRASTRUCTURE, MANAGEMENT AND SUPPORT QUESTIONS FOR PUBLIC LIBRARIES

Please describe plans for technology implementation based on responses to the following questions. Think about these questions in terms of a planning context. For example, where are you now in terms of telecommunications/Internet connectivity and where do you need or want to be at the end of the planning cycle? The table can be expanded as needed to provide complete information.

QUESTION	RESPONSE
What is your telecommunications/Internet connectivity capacity in your regional public library system or public library for Internet access and video connectivity?	We currently use a Qwest frame relay with T1s to all sites (5) with 4 T1s back to the host time.
Do you have plans to expand this capacity within the next three to four years?	Yes – we annually review our current capacity and make recommendations for upgrades.
If you plan to expand telecommunications capacity, what will be your anticipated capacity by the end of this planning period (July 1, 2011)?	As mentioned above, this is reviewed annually.
What is your capacity to provide Internet-accessible computers to public library customers? What will this capacity be at the end of the planning cycle?	We currently have 90 Internet accessible computers for library customers. We will be expanding this capacity going forward – plan period may include building another library and major additions in 2-3 current libraries. Telecommunications capacity will drive part of this discussion.
What is your capacity to provide Internet-accessible computers for staff? What will this capacity be at the end of the planning cycle?	We currently have 45 Internet accessible computers for staff. This number should also increase by the end of the planning cycle.
What is the average age of computer equipment used for information resource access in your regional public library system or public library?	Average age is 2 years.
What is schedule/timeline for your computer equipment replacement cycle?	Current replacement plan is 3-4 years.
What is your computer platform? PC-based, MacIntosh-based or both?	PC based only
How many technology support	We currently have two staff that provide support for

QUESTION	RESPONSE
staff do you have to manage your technology infrastructure and network?	both Carver County and CCL infrastructure and network.
Is the technology support staff sufficient to the task of effectively managing your technology infrastructure and network? If not, what staff capacity do you think you need?	No. Current Carver County IS department staff numbers are low, and they also support all other County departments. It would be beneficial to have staff dedicated to library support and network. (1.5 FTEs)
Is assistive technology for customers with special needs provided and supported in your public library?	Currently only have low tech options available.
Are technology support staff provided with the necessary training they need, including training associated with assistive technology?	n/a at this time.
How and when are technology support staff provided with training?	
What particular challenges does your regional public library system or public library face in providing sufficient access and technology resources to your customers and staff?	Limited staff time, ability to provide sufficient bandwidth and stay within budget. Our ability to provide access and resources is dependent upon availability of IS Staff

## **CRITERIA V: STAFF DEVELOPMENT AND TRAINING**

The technology plan must include strategies for providing ongoing professional development for public library staff in the use of technology for delivery of public library services and access to information.

### **GUIDING QUESTIONS FOR PUBLIC LIBRARIES:**

- a. What staff development activities are planned to provide training to public library administrators and public library staff in the delivery of public library services?
- b. Are public library staff sufficiently trained to use the technology to deliver library services? How are staff assessed on the effectiveness of training?
- c. Are public library administrators sufficiently trained in the use of technology as an administrative tool? How are administrators assessed on their training?
- d. Are there particular challenges your public libraries are experiencing in providing sufficient professional development activities for staff? If so, what are they?

We are currently using a Self Assessment checklist to survey staff to use as starting point for training plans. We have provided training opportunities in the past, but most of it has been designed and delivered by outside sources. For example, training provided by Pro Source through Carver County on Microsoft applications or training funded by MELSA. We would like to design and develop our own training plans based on the results of the Self Assessments currently taking place. We continue to hear from many staff members that they do not feel adequately trained or knowledgeable about technology available – both for their work needs and to serve the public.

We will continue to use all training opportunities available, but our goal is to focus on training that our staff requests. For example,

- We have asked Carver County to provide a library only Microsoft Publisher training class which has been scheduled to accommodate more library staff.
- We have initiated monthly “Tech Talks” to cover individual topics of interest to library staff. The sessions are 60-90 minutes are presented by different staff members. The topics will be determined by input from staff on topics they want to know more about. Our most recent Talk was an Mp3 players and iPods.

As with many other libraries, we do face challenges in providing adequate training for staff. For example, we do not have a training lab to use for either staff or public training. We are considering purchasing wireless laptops for use in both public and staff training.

Staff training has been identified as one of our goals for this plan period.

## **CRITERIA VI: BUDGET FOR TECHNOLOGY**

This section is designed for the public library to show evidence that a budget is planned and will exist for the course of the technology plan. Evidence of sufficient budget to support technology at the school or library is required by the federal E-rate telecommunication discount program. To the extent possible, identify existing and potential technology funding sources, and create a budget summary of projected expenditures for technology over the next four years. Include estimates for expenditures on items such as hardware, instruments and equipment, software, consulting contracts, telecommunications services, staff, training for technical staff and staff development opportunities for public library staff, supplies, and facilities.

We realize it is difficult to budget long-term for technology when school districts and libraries are subject to variations in funding based on legislative action and other factors. Please estimate as best as you can with the information you have available. Remember to also address the following key components in the budget narrative:

- Evidence of adequate budget to support infrastructure and services that provide the school or library with the capacity to effectively use telecommunications and Internet access services supported through the federal E-rate telecommunications discount program.
- The types of services to be supported through the federal E-rate telecommunications discount program.
- Existing and potential funding sources.
- Particular funding challenges your public library faces in providing adequate technology resources.

**Please use the following template in developing your proposed technology budget for 2008-2011. Uniform Financial Accounting and Reporting Standards (UFARS) Object Codes are provided for your convenience to assist in the process. You may expand table categories if needed. On a separate page, outline any budget details such as funding sources, funding issues, or other factors that will impact your technology budget over the next few years.**

**Please note – our 2008 budget will not be finalized and approved until December 2007. All budget figures are based on assumptions and expense/revenue we anticipate for the years 2008-2011.**

## BUDGET TEMPLATE FOR PUBLIC LIBRARIES

CATEGORY	ITEM(S) DESCRIPTION	FY2008 BUDGET	FY2009 BUDGET	FY2010 BUDGET
Salaries and Wages for Technology Staff	Current Library Staff only for technology and website. Carver County Information Services staff not included.	86,000	92,000	97,000
Fringe Benefits for Technology Staff				
Purchased Technology Services				
Consultant Services		10,000	10,000	10,000
Communications (telephone, Internet access)	Includes ISP, data connectivity, Blackberrys, wireless. Telephones provided by cities.	100,000	105,000	110,000
Computer and System Services				
Technology Staff Development				
Technology Workshops and Conferences	Conferences and Training	7,000	7,000	7,000
Technology Leases and Rentals				
Purchased Technology Services (i.e. maintenance)	Innovative, authentication, print management, catalog enhancement, filtering, anti-virus, self-checks, SPAM, firewall	55,000	60,000	65,000
Supplies and Materials (computer software, etc. both instructional and non-instructional)	Adaptive technology and other software upgrades	10,000	10,000	10,000
Capital Expenditures (technology equipment)	PC replacements, servers, self-checkouts, wireless	100,000	85,000	30,000
Other Expenditures (list)	Innovative products/website and catalog improvements Miscellaneous	25,000	25,000	25,000

2008 – Capital includes Innovative server (if not 2007) and one self-check

2009 – 4 replacement self-checks, 2011 - 3 replacement self checks

Not included – new libraries, Materials Handling, RFID, major remodels, laptop lab

## **CRITERIA VII: IMPLEMENTATION PLAN**

The implementation plan should include basic schedules and timelines, budget commitments, equipment to be purchased, communications strategies associated with the technology plan, action steps for tasks to be completed, periodic evaluation of progress with implementation of the plan, milestones to be reached, staff assignments, and time estimates for tasks. For example, action steps might include selecting computer hardware, software, and telecommunications/Internet services, installing and maintaining equipment, hiring and training staff, providing end-user training, etc. The timeline that should be reflected in the implementation plan is July 1, 2007 – June 30, 2011.

### **GUIDING QUESTIONS FOR PUBLIC LIBRARIES:**

- a. What is the basic implementation plan for the strategies outlined in the technology plan? What action steps does the organization need to follow to achieve the goals of the plan?
- b. What is the timeline for implementation?
- c. Does the technology plan covers the period from July 1, 2007 through June 30, 2011?

Our Technology Plan covers the period from July 1, 2007-through June 30, 2011. Based on our Carver County budgeting, we are currently submitting budget requests for 2008. The requests are due in June 2007; the 2008 budget will be approved in December 2007.

Our implementation plans are listed below

#### **Adequate Bandwidth**

- Analyze bandwidth semi-annually and increase as industry standard saturation points are reached in order to ensure adequate response times for customers and staff.
- Work with providers to provide services in most cost effective means available.

#### **Standardize Library Hardware/Software**

- Plan pc replacement based on pc image and replace all on rotating basis.
- Automate process of updating software on library pcs.
- Create consistent vehicle for library staff to report technology issues in order to ensure timely response and identify systemic problems.
- Offer wireless service in all libraries.

## **Staffing**

- Analyze network and technology twice each year to determine staff time needed for implementation of upgrades to ensure there is adequate staffing levels to perform tasks.
- Investigate contract services as appropriate.

## **Staff Training**

- Continue to encourage staff to attend trainings provided by Carver County on software applications.
- Continue to encourage staff to attend training provided by outside sources on library related issues
- Investigate alternative delivery of training and customized training methods - self directed learning, pre and post testing, individualized training on Library 2.0 topics
- Identify Technology Wizards at each location who can assist customers and train staff on troubleshooting technology issues.
- Continue/expand Tech Talks

## **Create a Technology Planning Committee Team**

- Group would meet 3-4 times yearly to review progress on Technology Plan and develop new initiatives as needed
- Group would review requests for new hardware and software and plan implementation/training as needed

## **Increase Customer Self Service**

- Increase self-checkout to 90% in all libraries
- Investigate and purchase Innovative products that will allow customers to continue to manage their library accounts and complete library transactions on their own.

## **Library Service for all Carver County residents**

- Provide adaptive technology in libraries as needs are identified either by staff or consulting with Carver County demographer.
- Provide library service to immigrant populations as needs are identified either by staff or consulting with Carver County demographer
- Use website as a tool to provide information about library services to all Carver County residents.

## **CRITERIA VIII: EVALUATION PLAN**

Technology plans submitted for eligibility for the federal E-rate telecommunication discount program must incorporate an evaluation strategy for the plan. Evaluation and outcome measurement are an integral part of technology planning and are essential to successful implementation of the technology plan. Progress should be measured at least annually. This section of the technology plan should include the following:

1. Results of Evaluation of Previous Plan (2004-2007). Please provide a minimum one-page summary of the process used for evaluating the previous plan and results of evaluation of previous plan.
2. Evaluation Plan for 2008-2011 Technology Plan.

One way of approaching an evaluation plan is to identify the key components for evaluation based on the following template developed by Gwen Willems, Evaluation Specialist, School Improvement Division, Minnesota Department of Education:

An evaluation of our 2004-2007 Technology Plan is listed on the next page.

Our plan was developed and approved by the Library Board in October 2004. Our Technology Planning Team met each year to review progress and make adjustments to the plan. Objectives met during the plan period include –

#### **2004**

- CIPA Compliance
- Patron authentication on public pcs
- Network printing available at all locations
- Library technology staffing – position of Technology Management Librarian created
- Self checkout available at Chanhassen, Chaska and Waconia.

#### **2005**

- PC replacements
- Replace routers/switches in libraries (2006)
- Upgrade bandwidth
- Evaluate and redesign library website (2006)
- Wireless access for Chanhassen, Chaska and Waconia

#### **2006**

- PC replacements
- Upgrade bandwidth
- Expand customer communication using ILS notification system – auto notices, courtesy notices
- Replace servers (2007)
- Self checkout at Norwood Young America

#### **2007 Plan Activities**

- PC replacements
- Upgrade bandwidth
- Chanhassen Materials Handling
- Self-Checkout at all libraries
- Preparation for potential new library

#### **Activities Not Meet for Plan Period**

- Develop Core Competencies for staff training
- Staff Intranet
- E-reference
- Self-Checkout benchmarks at each library – goal/actual Chanhassen 70/64, Chaska 50/44, Waconia 50/48

#### **Activities Moved to New Planning Cycle**

- Investigate RFID
- Upgrade Innovative server

#### **Ongoing Activities**

- Improve bandwidth
- Research and investigate new technologies
- Review plan with library consultant
- Meet to evaluate progress and revise technology plan if needed

Listed below is the evaluation plan for the 2008-2011 Technology Plan.

### Evaluation Plan

<b>Evaluation Questions</b>	<b>Information Needed</b>	<b>Information Source</b>	<b>Proposed Methods/Analysis</b>	<b>Staffing</b>	<b>Time Line</b>
Are we adequately meeting the bandwidth needs of our staff and customers	Usage reports from vendors	Vendors and IS Staff	Monitor communications lines on regular base and provide usage reports.	Library, IS	Quarterly
Standardize library hardware/software	What software is available on what pcs	Library staff vendors	Hardware/software inventory	Library	Quarterly or as needed
Adequate staff training	Self assessments from staff, staff requests, hardware software upgrade	Staff, vendors, library groups	Pre and post testing, staff feedback	Technology Planning Team	Ongoing
Technology Planning Team	Meeting agendas	Meeting minutes and follow up activities	Regular meetings, assign activities as needed	Technology Planning Team	Meet 3-4 times each year
Increase Patron Self Service	Usage stats	Innovative, web stats	Monthly Report	Library	Monthly
Library Service for all Carver County Residents	County demographics, customer and staff feedback,	Same	Survey	Library and County	Annually

## **GUIDING QUESTIONS FOR LIBRARIES:**

- a. What measures of performance have you incorporated into your plan to determine whether your technology implementation and investments have been effective in achieving your identified technology plan objectives?
- b. How often will you evaluate progress on your technology plan?
- c. What types of data will you collect to measure progress?
- d. Who will do the evaluation?
- e. Who will be responsible for documenting the evaluation process?
- f. What are the results of the evaluation of your 2004-2007 technology plan?

Now that we have our Technology Planning Team in place, our goal is for that group to meet more frequently. In the past we have met annually, for this plan period we have set a goal for the group to meet quarterly and involve more staff to be involved with technology decisions for the library. Meeting more frequently will help us to more adequately measure progress on our goals and make adjustments as necessary.