

# South Central Library System

## Technology Plan

### 2011-2012

#### I. Background

##### **Mission**

The mission of the South Central Library System (SCLS) is to help member libraries provide the best possible service to the public. To this end, the system has adopted staff and system principles, which are included as Appendix A.

##### **Description of SCLS**

SCLS, one of 17 public library systems in Wisconsin, provides services to 53 libraries in Adams, Columbia, Dane, Green, Portage, Sauk and Wood Counties. These counties include nearly 800,000 people, with the majority residing in Dane County. System population density ranges from sparse rural to dense urban. Municipalities vary greatly in size, from villages with populations well under a thousand, to the city of Madison, representing approximately 28% of the entire population of the system.

The SCLS Staff is comprised of 23 staff members at the Headquarters office and 28 staff members working for the Delivery department. Nine staff members at Headquarters work for the Technology Team. An organizational chart can be found in Appendix B.

##### **Current Technology Environment**

The Technology Team is comprised of 9 staff members:

- Help Desk Technician: responsible for first line response to help desk questions, installing and upgrading PC software
- Computer Systems Integrator: responsible for server support, testing new technologies, network and firewall support, scripting and process automation
- Systems Support Specialist: responsible for helpdesk support, internal websites, supervision of the night and weekend operators, liaison to ILS group
- Network Administrator: responsible for network hardware installation and support, and consulting on new building projects
- Two Computer Technicians: responsible for purchasing and maintaining PC workstations, hardware and software troubleshooting
- Library Technology Project Support Specialist: responsible for the support of several online services including Library Online and access to subscription databases
- Technical Support Specialist: responsible for PC upgrades, wireless troubleshooting
- Technology Projects Manager: responsible for overall project and staff management

The majority of the SCLS technology services are available to all member libraries. However, not all SCLS libraries participate in the shared integrated library system (ILS) and public online catalog. Currently, the Technology Team supports PCs on the SCLS network and a large number of PCs that access the Internet through commercial Internet Service Providers (ISPs), such as Charter or Verizon. This legacy model of SCLS/non-SCLS PC support is in a transitional state, and SCLS is working on a unified SCLS network where all PC support is provided through one network connection.

### **Relationship of Technology Team services to SCLS Strategic Plan**

The SCLS Strategic Plan is based on the belief that, as a community, SCLS can do many things that none of the individual entities could successfully undertake alone. Many technology services described below would not be possible for individual libraries to implement on their own without significant expense and expertise. With system-level management, provision of services becomes cost-effective and efficient for the whole SCLS community. Specific initiatives from the Strategic Plan that are supported by existing and planned technology services include:

- Investigate new developments in information technology and implement those most desired and of greatest worth to the public we serve.
- Determine ways that selected new technologies can be implemented with available resources, or seek out new resources for such implementation.
- Offer goods and services that meet at least some of the needs of each unit of our diverse member population.
- Cooperate with member libraries to offer a wider spectrum of online electronic resources to the public.
- Promote new and existing services to library staff and public through training and widespread communication using varied media formats.

## **II. Description of Services**

### **General system services**

SCLS provides many services to its member libraries, making them more effective and efficient by:

- Helping them share materials so that thousands of dollars expended locally equal millions of dollars in services provided to the general public through the shared system environment;
- Providing them with leadership in the areas of technology and telecommunications;
- Providing them with the training and expertise to cope with new and constantly changing technologies and demands for service.

Specifically, SCLS provides non-technology services in the following areas:

- Contracts for library resources: SCLS pays the Madison Public Library more than \$95,000 annually to purchase extra copies of popular items and items not owned by other member libraries.
- Cooperative management services: SCLS coordinates orders and shipping for everything from library cards and fliers to puppets and computers, saving libraries money. The system manages county library budgets on request and cooperative projects in all areas of service.
- Interlibrary loan: SCLS contracts with Madison Public Library to provide for interlibrary loan services for all SCLS libraries, providing access to items not found within the ILS.
- Delivery service: Delivery is essential to resource sharing, so SCLS delivers materials requested by area residents to their local libraries. The cost to send an item from one library to another in SCLS costs 20 cents, a vastly less expensive solution than the U.S. mail. Delivery staff and member libraries continually work together to increase the effectiveness of the service.
- Professional consultants & continuing education: SCLS consultants field a variety of requests from member librarians for assistance with library-related issues ranging from creating a budget to building design and layout. To educate library staff, SCLS maintains a collection of professional materials for use by member libraries and also organizes continuing education programs on a variety of topics. SCLS also helps libraries develop programs to serve children, young adults, families, and to provide services to users with special needs.

#### **Ongoing services provided by the Technology Team**

- **Operation of a time and print management solution:** SCLS maintains two servers and provides support for the Library Online product from Active Network. Approximately 36 member libraries use this service with four libraries using the Print Management Option.
- **PC support:** Currently, PC Support is divided into support for computers on the SCLS Network and support for PCs on other networks. While these services are provided by different staff members at this time, the services provided are generally the same: assisting libraries with hardware replacement plans, purchasing and staging of new equipment, securing the computers, updating the operating system and other software as necessary, and troubleshooting of hardware and software problems. The computers connected via the Wide Area Network (WAN) are often updated through remote control and automatic updates, while those not on the WAN currently require a manual process.
- **Network support:** Like PC support, network support is divided into support for the SCLS Network and support of the commercial networks. Activities to support the SCLS Network include working with DOA TEACH and other agencies to ensure that member libraries continue to have adequate telecommunications access and capabilities, filing for e-rate service for data lines, maintaining network security by providing an antivirus solution, continually patching the latest security holes, educating library staff about safe internet and email practices, monitoring

the network for bandwidth usage, and maintaining servers.

Support for non-LINK networks varies by library and network, but primarily includes insuring a reliable and stable connection from the ISP.

- **Wireless access support:** All 53 SCLS member libraries and branches have wireless internet available, with 41 of these libraries receiving support from SCLS staff.
- **Email list services:** SCLS creates and maintains email lists for member libraries and SCLS to use for communication among staff and between libraries. SCLS also assists libraries in finding appropriate providers for email list services for patron lists.
- **Website services:** SCLS staff assist member libraries to maintain websites by providing hosting for websites, redesigning library websites, providing training and assistance in maintaining websites, investigating and using new technologies in library websites, assisting libraries in getting and understanding usage statistics for websites, purchasing alternate domain names, and creating online forms for libraries as requested.
- **New building support:** SCLS Technology staff work with libraries that are undertaking remodels or new building projects to ensure that the building meets the technological specifications for the ILS, public computing services, and new technologies such as RFID and automated handling equipment.
- **Reference database support:** Patrons in the SCLS service area have access to a number of online reference databases. Some databases are purchased by SCLS, some are purchased by all SCLS libraries, and some are purchased by sub-groups or individual libraries. In addition, SCLS works with the Wisconsin Public Library Consortium (WPLC) for access to OverDrive. Regardless of the funding source, SCLS provides user authentication services for all databases, along with interface design and technical support and troubleshooting.
- **Online reference support:** SCLS provides email forms for reference questions for member libraries, supports virtual reference services through troubleshooting and coordination, and assists libraries in creating IM reference services. Virtual reference services are provided through a statewide consortium called AskAway.
- **Gadget Packs:** The SCLS Technology Team maintains a collection of gadgets including a wide variety of e-book readers, Apple mobile devices such as iPads and iPods, Flip Cameras, MP3 players, and portable gaming devices. Member libraries can request and check out the equipment for staff training and experimentation rather than purchasing the equipment themselves.

- **Continuing education support:** Because SCLS includes libraries in a seven-county area, distance education options are a necessity. SCLS maintains videoconferencing for continuing education events and for planning meetings, and contracts for service for web conferencing. Technology staff work with the Continuing Education Coordinator to provide online tutorials for priority projects and to teach training sessions, as appropriate. SCLS also provides equipment for training activities, including several wireless labs, which technology staff support.
- **Youth services support:** Technology staff members assist in the Summer Library Program by creating and maintaining a blog for teen book discussions and registration forms for the program.
- **Day-to-day operations support:** There are many technologies used to ensure that internal operations at SCLS are as efficient and cost effective as possible. Technology staff support administration databases, financial and personnel software (currently QuickBooks), office equipment, internal file shares, personal digital devices and office computers and other software.
- **ILS System support:** The Technology Team supports the ILS group and the Integrated Library System by providing server maintenance, helpdesk support, and statistical report creation. When the current ILS system migrates from Dynix Classic to the Koha Open Source ILS system, the Technology Team will be assisting in the transition from one system to another and has worked closely with the ILS team, developing custom reports, integrating new and existing print hardware with the new system, creating custom scripts and maintaining the Talking Tech telephone calling system.
- **New technology services:** As a “trailblazer, an innovator, and a catalyst,” SCLS looks for new technology services to introduce to member libraries as appropriate. These services may be pilot projects to prove the utility of a certain device or service, or it may be training opportunities on new technology for all libraries in the system.
- **Communication about technology:** The Technology Team continually investigates new methods of communicating with member libraries to raise awareness of and improve the technology services we provide. One method is TechBits (<http://scls.typepad.com/techbits/>), a blog that provides information about ongoing projects, tips and tricks, announcements of new services, information about new technologies, and more. Another method is the SCLS Status Wiki (<http://sclsstatus.pbworks.com/>) The Status Wiki provides a continuous update of server uptime and downtime, known network problems, and any issues with the Delivery Service.

### **III. Funding and Budgets**

Technology projects are purchased through contributions from both SCLS and the member libraries. Currently, we are looking at a new cost sharing model, with a plan to be in place by Spring, 2011. More information can be found here: <http://www.scls.info/committees/ac/feestructures2011.doc>

### **IV. Planning Environment**

Planning for technology is a continual process, and requires communication both within the team providing technical support and between the team and its customers. The Technology Team plans for changes and develops projects by gathering input in a variety of ways:

#### **Internal Discussions**

The Technology Team meets formally every Monday morning to review current projects, diagnose any technology-related problems that cannot be solved individually and plan for upcoming services or updates. If a project or issue lends itself to a more detailed discussion, the team schedules additional meetings devoted to that issue.

Now that all the Team members are located geographically in the same building, communication is greatly improved. Informally, the team discusses issues every day, through face-to-face conversations, e-mail, and instant messages.

#### **Conversations with Member Libraries**

The Technology Team meets both formally and informally with Member Libraries throughout the year, gathering information about the library environment and the various technological issues facing the libraries. The formal process involves scheduled consultation visits where Technology Team members visit member libraries and consult, as a group, in order to solve problems. Informally, Technology Team members, especially the Computer Technicians and the Technical Support Specialist, visit the libraries on a regular basis in order to repair PCs. During those visits, they're able to gather information and bring it back to the team.

#### **Technology Committee**

The Technology Committee (TC), a sub-committee of the Administrative Council, is the primary advisory group to SCLS on technology services. Comprised of 12 committee members, representing 12 clusters of libraries, the Technology Committee:

1. Oversees technology projects and schedules.
2. Serves as a forum for discussion and first-level decision-making concerning technology issues and services.
3. Oversees SCLS technology plan and annual projects plan and recommends elements for inclusion in SCLS annual planning efforts.

4. Determines procedures and makes recommendations to Administrative Council for policy changes and technology projects with budget implications.
5. Creates working groups as required subject to the approval of the Administrative Council. Participation on working groups will not be limited to committee members.
6. Makes recommendations concerning annual budget.

The Technology Team also uses the “Staff Strategies and Library Responsibilities” document created in 2009 to help shape priorities and technology expectations. (See Appendix C for more information).

## **V. Priorities for 2011**

### **1. Windows 7 integration and installation**

One of the challenges for the Technology Team is the inevitable end of support for Windows XP, the current operating system installed on every PC supported by SCLS. Windows 7 affects a multitude of back office services, including servers, security software, antivirus software, the remote control applications used by the Technology Team, and many other applications. Throughout 2011, the Technology Team will be implementing the various components of the Windows 7 roll-out:

- a. **Replacement of server hardware at SCLS HQ**
- b. **Upgrade of Server software to Windows Server 2008**
- c. **Integration of new Windows Domain structure into existing Domain**
- d. **Upgrade of select groups of Staff PCs to Windows 7**
- e. **Upgrade of select groups of Patron PCs to Windows 7**

This will be a staggered roll-out, and libraries can expect a hybrid environment of both Windows 7 and Windows XP machines for many months due to licensing issues. Also included in the Windows 7 roll-out will be considerations to the Patron PC Model document approved by the Technology Committee in late 2010.

### **2. BadgerNet Fiber Alternative Plan**

Many of the services planned in 2010 were predicated on the Federal Stimulus Fiber Grant that would have brought high-speed fiber connectivity to nearly all of our member libraries. Now that the grant has been rejected, SCLS needs to explore alternatives for increasing network speeds as well as ways of combining the disparate network systems at each library.

### **3. Support for Fitchburg library Project**

Due to the scope of the new library building for the City of Fitchburg, the Technology Team will have to devote a significant part of time in early 2011 in support of the

library's technology needs including PC purchasing, and network and wireless set-up and implementation.

**4. Development of a more robust wireless solution for member libraries**

Through our work with the Fitchburg library project, we expect to have new tools and techniques that we can use to explore a more robust wireless service for member libraries.

**5. Exploration of various printing issues**

The Technology Team will start examining ways to offer a more enterprise-wide patron printing environment. Some of the future services may include color printing, black and white printing, wireless printing, and a comprehensive print management system. It is possible that this service may be combined with the E-Commerce services proposed by the E-Commerce work group.

**6. Partner program for member library technical staff**

In late 2010, the Technology Committee approved the SCLS Partnership Program document, a service that we plan to offer in 2011. The Technology Team will be working with member libraries to create a plan for offering this service to interested libraries during this year.

**7. E-Commerce**

The Technology team will be working with the newly formed E-Commerce working group to develop a viable strategy and list of services under the moniker of E-Commerce.

**Two Year Strategic Priorities (2011-2012)**

The two year strategic priorities focus on medium term projects and services that necessarily span a 24 month period.

**1. E-Commerce**

In 2012, the SCLS Technology Team, in conjunction with the E-Commerce working group, will be able to start implementing the services defined by the working group. At this time, it is premature to create a discreet time-line but we expect that in the next year, the work by the TC working group will help to form a better understanding of when libraries can expect E-Commerce services.

**2. Unified PC management solution**

By 2012, our expectation is that all SCLS-supported PCs will be unified on one SCLS-supported network. This will allow greater technical support provided by the helpdesk

as well as a unifying environment in each library.

## **VI. Future Services**

Future services are divided into a two year plan, with 2011 focusing on short term projects and initial development, and 2012 focusing on long term projects.

### **2011 Potential Services**

- **Content Management System**  
The SCLS Technology implemented a test Content Management System (CMS) for the SCLS web developer in January, 2011. We expect to continue to help support the exploratory work on the CMS server throughout the year.
- **Windows 7 integration**  
In 2011, we will start the process of rolling out Microsoft Windows 7 Operating System on both staff and patron workstations as detailed above. At that time, we will have found solutions and replacement applications for any product or service that does not currently function under Windows 7.
- **E-Commerce solutions**  
We will continue work with the E-Commerce workgroup on E-Commerce solutions in order to roll out an E-Commerce product to member libraries by 2012.
- **Continued work on Member Library PC Backup Solution**  
We will continue work on the Member Library Backup Solution in order to assess viability of a service by 2012.
- **Other products and services as needed**

### **2012 Potential Services**

- **E-Commerce solutions for Member Libraries**  
By 2012, the Technology Team will have investigated methods of Electronic Commerce, including fine payments via credit card and other integrations with patron financial information and will be able to roll out services proposed by the E-Commerce workgroup.
- **Print and Print Management service**  
These services—in conjunction with the E-Commerce workgroup findings—will focus on a print management solution for member libraries that would not only function on multiple networks, but would incorporate both color and black and white printing, as well as possible wireless printing options.
- **Member library PC data backup**

The Technology Team has started the preliminary investigation in offering possible PC data backup services to libraries.

The scope and potential cost to member libraries will be examined and shared with the Technology Committee. If such a plan is feasible both technically and economically, the service will be offered to member libraries by 2012.

- **Other products and services as needed**

## **VII. Assessment**

Priorities and projects are important to any technology plan but fall flat without a plan for assessment during and after the project is complete. Our goal is to develop a comprehensive assessment method that will help provide technology staff and member libraries a clear view of where projects are at, what's going well, and how we can improve in the future.

### **Assessment Tools**

The Technology Team will utilize several tools to help with the assessment process:

- **Surveys**  
Member libraries were surveyed  
After the next major project—and after the Koha implementation—the SCLS technology team will continue to utilize survey methods to best gauge the scope and interest of our member libraries.
- **Focus Groups**  
Focus groups made up of member library staff members will be utilized when applicable to examine projects or services in their initial stages.
- **Usability Studies**  
If a project involves a user interface, the Technology Team will run usability tests on the interface, using member library staff members and patrons if necessary. The results of the usability studies will help shape the overall look and feel of the interfaces.
- **Project websites**  
The Technology team will attempt to create websites listing the various projects and their timelines, making project information available to member libraries at all times.

### **2011 Assessment Plan**

In 2011, we will review the projects completed in 2010 and use our findings to help shape any new projects or projects that are already started. Timelines for the two year projects will be reviewed and any mid-course corrections will be applied at that time.

**2012 Assessment Plan**

The 2012 assessment plan will be similar to the 2011 plan. Previous years' projects will be reviewed and timelines for the two-year projects will be corrected if necessary. Since technology is a rapidly changing world, modifications to the three year goals may be necessary and mid-course corrections will be applied as appropriate.

# Appendix A: SCLS Staff and System Principles

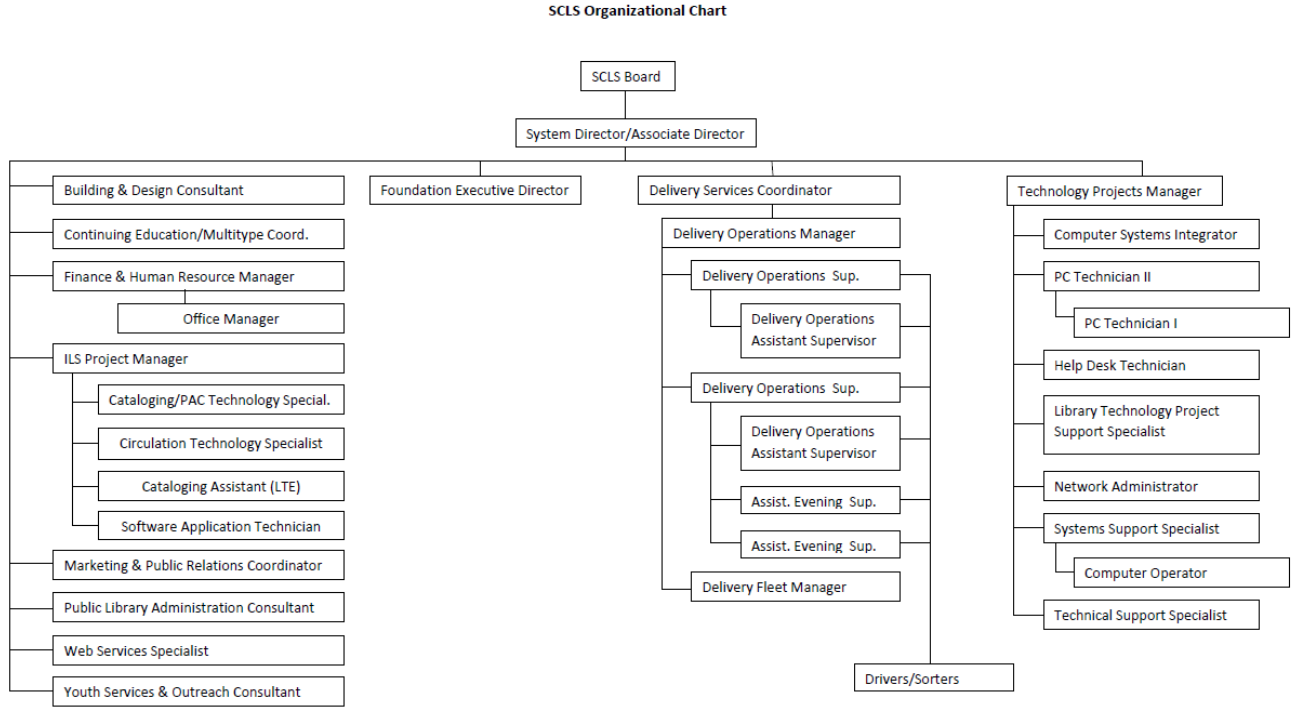
## Staff Principles

1. SCLS staff stay focused on our mission and measure all of our work, plans, programs, activities and behaviors against it.
2. SCLS staff do excellent work and endeavor to exceed member expectations.
3. SCLS staff are responsible for achieving and maintaining good working relationships with every member library and with every coworker. We make it a high priority to treat people well. We are always courteous to members and to each other. When we make mistakes, we acknowledge them, apologize, and move on.
4. SCLS is a community of people who are different from each other in many ways, however, staff work as a team, respecting the contributions and viewpoint of each member. We freely share information and communicate our plans, activities and concerns to the other members of our team and give credit where credit is due.
5. SCLS staff work toward solutions for problems.
6. SCLS staff keep our commitments, meet our deadlines, and take responsibility for getting the training and resources we need to do our work.
7. SCLS staff are sensitive to member's perceptions and strive with each interaction to make them more positive than before.
8. Our work is far too important for us to always be serious. We approach it with a sense of fun and include as many laughs as we possibly can.

## SCLS Basic System Principles

1. Every member library must have a voice in the planning and governance of the South Central Library System (SCLS) and clear opportunities for input into system direction, management, and service priorities. Every member library has an accompanying responsibility to participate in these planning and governance processes.
2. SCLS and member libraries will attempt to clearly communicate library issues to all stakeholders.
3. SCLS is a community of libraries that differ from each other in many ways. SCLS must be designed so as to offer something of value to all its members, to respect diversity, and to engender mutual respect among members and between members and system staff. Because of this diversity, SCLS may have different structural relationships with different counties within the system. To the extent feasible, each county should have the primary responsibility for determining the general nature of that relationship.
4. SCLS exists to make its members stronger. To this end, SCLS will concentrate on providing services to and through its member libraries rather than directly to the public. An exception to this principle may occur when an existing agency cannot deliver a needed service, or when the system can provide the service in a substantially more effective manner.
5. SCLS should be a trailblazer, an innovator, and a catalyst. SCLS should initiate projects and then empower local libraries to continue them. System funds must in no way replace local efforts for established services.
6. SCLS, as a whole, must be greater than the sum of its parts. The services provided to each member library must be of greater value than that member could achieve by simply spending its own share of the funds separately.
7. SCLS must operate within the framework of statutory requirements while striving to meet member needs.

# Appendix B: SCLS Organizational Chart



January 2010

## **Appendix C: Staff Strategies and Library Responsibilities**

### **SCLS Technology Staff Strategies**

How we work with each other and SCLS member libraries significantly impacts our ability to develop and implement technology solutions. It is important to keep in mind some basic service strategies.

#### **Try to understand technology from the library's perspective**

- Communicate about technology in a way both parties are comfortable with and can understand.
- Recognize the value of a project or suggestion from the library's perspective, and trust the expertise and knowledge of library staff.
- Actively involve the libraries as partners.
- Be open to ideas and suggestions from the libraries. Be positive when you consider possibilities.

#### **Empower and encourage the libraries**

- Don't do things for people that they can learn to do themselves, but instead empower them to act on their own behalf.
- Be proactive and encourage libraries to investigate and employ new technologies.
- Be appreciative when libraries do tasks we ask them to do.

#### **Make the best of difficult situations**

- Be receptive and open to feedback and criticism.
- If we can't do something, explain why in easy-to-understand terms.
- Let people also know the mechanisms to change things if they are unsatisfied.
- Keep in mind that we can't make everyone happy all of the time.

#### **Work together as a team**

- No matter your position, you have the power to identify solutions.
- All involved staff should have a voice in the planning and decision-making for a project.
- No body of knowledge can only be in one person's head. It limits input and creativity and poses significant risk.

#### **It's important to "Get Stuff Done"**

- No plan or project is perfect, and perfection should not be our goal.
- Look for simple solutions, and avoid substituting complicated solutions when they aren't warranted.
- It's okay to trim it down to the essential steps, and you should never feel the need to "cover yourself."
- Ask for feedback, but don't let the absence of feedback keep you from acting.
- Cost isn't just about dollars. Time, effort, and support must also be considered.
- You can't do everything, and it's okay to let go of some things.

#### **Don't be afraid to think big**

- Challenge assumptions about how things are now.
- When faced with choices, take the one that provides the best possible service to the greatest number of people.
- Sometimes a small change is the right change. Sometimes making a larger change could make the service even better. Consider both when finding solutions to problems.

## **Technology Responsibilities of Member Libraries**

How the SCLS member libraries work together with each other, with SCLS, and with SCLS technology staff significantly impacts our local and collective ability to develop and implement technology that provides the best possible service to the library patron.

Recognizing that we are stronger collectively than we are individually, it is important for member libraries to keep these tenets in mind.

### **Try to understand technology from SCLS's point of view.**

- Remember that SCLS supports nearly 1,200 computers and that uniformity is the price of lower costs and faster response time.
- Recognize that there are 52 other libraries suggesting projects and asking for local exceptions.
- Be open to ideas and suggestions from the system that would improve service for everyone even if it comes at the cost of some local autonomy.

### **Develop the skills & knowledge to be a partner in technology.**

- Don't ask system staff to do things that you can learn to do yourselves.
- Communicate about technology among your own staff. Let them know of updates, conversations, and problems, and any communication you've had with SCLS staff. When all staff at a location have the same knowledge, it's easier to communicate with SCLS staff, and vice versa.
- Be proactive and investigate and employ new technologies. Share those investigations with SCLS staff.
- Realize that SCLS staff provides service to many library staff with varying levels of technology skill and knowledge. When they ask a long series of questions, it is to find out data to help them diagnose the problem, not to imply a lack of technical expertise.
- When given instructions by SCLS staff, use them. Call staff if you have questions while following the instructions, or if the instructions fail to fix a problem.
- Stay current with information sent out by SCLS.

### **Work together as a team.**

- Libraries need to let the system know when there is a problem – a problem can't be fixed unless it's known.
- When letting the system know about problems also let them know about possible solutions.
- Be part of the planning and decision-making process.
- Follow the rules as much as possible and when you can't, explain why you cannot.
- Don't forget to let SCLS staff know about what is working well.

### **It's important to keep moving forward.**

- No plan or project is perfect. Not deciding is also a decision.
- Having everyone on board as we move forward is important.
- Cost isn't just about dollars. Time, effort, and support must also be considered.
- We may not be able to provide all the services we want without letting go of some other things.

### **Remember to think big**

- It's a large system both in terms of numbers of libraries, PCs on the network, and geography and the needs of each local library may not always be satisfactorily met.
- When faced with choices, we should encourage the system to take the one that provides the best possible service to the greatest number of people.