

WISCONSIN VALLEY LIBRARY SERVICE

TECHNOLOGY PLAN

Meeting the Wisconsin Department of Public Instruction Requirements



2010 - 2012

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EXECUTIVE SUMMARY

Wisconsin Valley Library Service is maintaining a technology plan to support the system plan, the ILS strategic plan, and other technology initiatives. This plan is in a format that identifies and addresses the technology elements required by the Wisconsin Department of Instruction and specifically, e-Rate, when applying for technology funding.

A technology plan is required for any library systems or libraries that wish to be eligible for federal e-Rate telecommunications discounts, Library Services and Technology Act (LSTA) funding, and other potential grant opportunities. This technology plan is intended to cover all WVLS member libraries, and fulfills the requirements for various funding opportunities, namely e-Rate discounts.

Section B, Technology Vision, Goals, Objectives, and Strategies, is a summary of the technology planning process WVLS has undertaken. It lists goals and provides general strategies and tasks required to meet them. Supporting information used in developing Section B, can be found throughout the other sections.

Major objectives for the system include updating internal infrastructure and technology tools as well as building a platform on which the system can help libraries expand services, reduce costs, and leverage limited resources to their fullest potential. Projects supporting these objectives include the development and implementation of a virtualized environment for core services, cataloging and updating existing equipment and software licensing, and strengthening a four point communication strategy to be able to adapt readily to the ever changing needs of member libraries and the communities they serve.

Currently our economy is experiencing difficulties at all levels, local, state, and federal. In response to this, WVLS has an increased focus on assisting member libraries deliver services designed to help communities create and or fill jobs. This focus is in directly line with state and federal goals to reduce unemployment.

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SECTION A - PLANNING AND NEEDS ASSESSMENT

In any organization, the implementation and management of technology resources is a continually evolving process. New innovation often leads to completely different usage models, sometimes ebbing into an environment almost unnoticed, sometimes driving change before people are ready. The very way we assess new services is fluid and dynamic, with social pressures, economic factors, and manners of maintaining relevancy continuously changing. Determining when to adopt new trends, and when to maintain an existing system is no simple task.

Technology Leadership

Joshua Klingbeil - Information Technology Director

Technology Team

The Technology Team gathers weekly to track technology projects. They bring to the table issues presented by various member library staff and coordinate resolutions to those issues. The team also keeps each other informed about recent trends and new concepts in technology. They manage IT, administer the ILS, provide training on all types of technology, and provide direct support to ILS users and to technology users in general. Members of the technology team regularly attend V-Cat Council meetings, WVLS Board meetings, and relevant library related meetings throughout the system, the state, and the nation.

Members include:

Marla Sepnafski – Director

Ann Mroczenski – V-Cat and IT Support

Ann catalogues audiovisual materials and generates ILS reports.

Juanita Thomas – V-Cat Database Administrator

Juanita catalogues non-audiovisual materials and supports the ILS databases.

Inese Christman – V-Cat Administrator

Inese serves as the V-Cat Administrator overseeing all aspects of the ILS project.

Joshua Klingbeil – IT Director

As IT Director, Joshua manages all aspects technology services and infrastructure within WVLS.

Wisconsin Valley Library Service

The Wisconsin Valley Library Service (WVLS) is one of seventeen library systems in the state of Wisconsin. It manages interlibrary loan and offers administrative service to seven counties in the central region of the state: Clark, Forest, Langlade, Lincoln, Marathon, Oneida, and Taylor.

Mission Statement

~ The purpose of the Wisconsin Valley Library Service is to provide, through cooperative efforts, improved library services to individual residents of the system area. The WVLS Board recognizes its responsibilities under Wisconsin Law and encourages planning and development of programs with other types of libraries in the system area to assure effective use of all area library resources. This specifically includes provision of legal access to public library services for all residents of the system area. It also includes improvement of library services through development of interlibrary loan and reference referrals, in-service training programs and professional advisory services, increased cooperation between all types of libraries in the system, maximum use of library resources of the area, and access to the total library resources of the state. ~

Current Technology Needs Summary

The creation of this technology plan is one of the first steps on the path of a revitalized WVLS technology effort. It is initially intended to satisfy the requirements of state and federal organizations, in order for WVLS and its member libraries to qualify for certain programs and funding. Its long term intent though, is to be a comprehensive roadmap, providing direction and vision to help keep WVLS on track with technological development and progress. This document is one of the critical "needs" of our system.

The more concrete technology needs are similar to most information oriented organizations: WAN and Internet bandwidth to support the ever increasing communications needs - capable networking equipment to support that bandwidth - servers, PCs, productivity software, communications software to provide digital communication and remote support functionality and reduce the high cost of personal travel – training to better understand and utilize the tools we need.

The pursuit of technology specific funding will help to guarantee financial commitment to technology development. Creation of a professional development plan that specifically lays out technology proficiency goals and methods to achieve them will help to build a more stable IT support system, and more self capable library staff in the areas of basic computer and network maintenance. Research of system wide computer and network repair services will help to establish a baseline for funding one or more WVLS employed service technicians.

Currently, one of our strongest needs is to ensure that federal, state, and local representatives understand the importance of libraries and their role of making technology available to the public. To ensure that they understand the impact libraries have and will continue to have in ever greater capacities, on their local workforce, employment rates, and ultimately economies. Gathering existing evidence and commissioning new research to this effect will be important to maintaining or possibly expanding library technology funding.

SECTION B - TECHNOLOGY VISION, GOALS, OBJECTIVES, AND STRATEGIES

WVLS Technology Vision

Residents served by Wisconsin Valley Library Service and its member libraries will have access to the information and technology tools required to positively impact their communities. Without losing sight of the many other recreational experience and general education services libraries offer a specific focus will be placed on utilizing resources to facilitate job creation, career training, and career placement opportunities.

Goals, Objectives, and Strategies

The following technology goals and strategies support the WVLS System Plan which can be found on the WVLS website at <http://www.wvls.org>.

Update WVLS Technology infrastructure, services, and ideology

Objective 1 – Improve communication with member libraries

A. Provide opportunities for direct interaction and dialogue

One of the most common requests by member library directors and technology staff was to have opportunities to interact directly with WVLS staff and with each other. These discussions can lead to a high level of information exchange and allow participants to more easily converge on a common understanding of the topic(s) of focus. WVLS will host several of these sessions per year following other system-wide meetings, create a Technology Summit specifically for technology related information exchange, and create educational opportunities.

B. Leverage Email Lists and Web Forums

These tools allow WVLS and member library staff to maximize the exposure of their messages at a very low cost. Email and list serves are familiar channels for mass broadcasting, while the forums provide a platform for organized, constructive information exchange to interested parties.

C. One on one phone conversations

Consulting with each member library's director and/or technology staff on an individual basis will allow the WVLS technology team to exchange detailed information at a more personalized level. These discussions will ensure that WVLS doesn't lose the perspective of individual libraries while focusing on a broader service offering.

D. Web conferencing

Web conferencing allows several people to connect in real-time from remote locations. Past experiences with the use of this technology have been sketchy, but interest expressed by various member libraries and the potential benefits warrant additional research and experimentation on developing its use.

E. Field Visits

Objective 2 – Improve IT infrastructure and management

- A. Analyze internal operations and usage requirements**
- B. Inventory existing resources**
- C. Create comprehensive asset lifecycle management strategy**
- D. Collect current licensing information and usage**
- E. Create licensing management strategy**
- F. Develop virtualization strategy**

Objective 3 – Bolster IT departmental resiliency

- A. Document standard procedures for all aspects of IT management**
- B. Eliminate the dependency of IT functionality on any single staff role**
- C. Update and/or create technology staff role guidelines and skill requirements to help fill vacant roles when the need arises.**

Provide opportunities for member libraries to better leverage existing resources

Objective 1 – Centralize Core and Common Services

A. Computer Security Services

Services like antivirus and system state software are used by libraries throughout the system. Providing central management of these services will reduce the duplication of efforts involved by each library individually. Increased license quantities purchased and managed by the single central entity will often lead to reduced pricing overall, meaning the participating libraries will save both time and money.

B. Computer system lifecycle planning, acquisition, and maintenance

C. Computer technical support services

One or more computer technician roles will be researched to determine longevity and feasibility. If created, these roles will provide technical support and computer maintenance services to libraries at a highly competitive rate.

D. Seek out additional ways to combine efforts, increase efficiencies, and positively impact budgets

Objective 2 – Focus on virtualization

A. Extend existing virtualized server environment

Some ILS services such as the Horizon SQL Database and HIP Portal are operating on virtual servers. This platform can be extended to include other services including additional ILS

components not yet virtualized. It can also be extended to host servers and/or services unique to the various libraries.

B. Research virtualization options and develop pilot projects

There are many ways for the commonly used computers and software to be virtualized. With award of the ARRA grant for fiber and increased to all of our libraries, an externally hosted 'cloud' environment looks more feasible. This method would allow for provisioning and allocation of resources as needed, with little upfront cost, minimal systems management overhead, and almost no additional hardware to buy and maintain.

C. Create opportunities for member libraries to extend our technology out into their communities to mitigate degradation during these harsh economic times, and to foster growth in some areas.

Objective 3 – Improve ILS capabilities (see Appendix A - WVLS V-Cat Strategic Plan)

A. Research modules and add-ons to existing Horizon ILS

B. Research alternative ILS offerings as new products are released, and established products are enhanced

C. Optimize procedures and work flow within the capabilities of our current system

D. Establish policies and standards to help streamline database maintenance.

Objective 4 – Create and update structured technology policies and guidelines

A. Review existing policies and procedures for ILS.

WVLS will ensure that a basic framework is clearly established for ILS management and support provided by WVLS. This framework will give the V-Cat Council a clear direction and a context within which it can work to improve the way the ILS is used.

B. Establish IT support services policies and guidelines

A policy will be developed for tracking support cases, to help WVLS understand how its services are utilized, and where to focus resources. This information will help us develop further guidelines and policy on fair and acceptable use of WVLS technology resources.

C. Establish IT services and resources usage policies

Existing policy will be assessed and updated to meet current needs. WVLS will encourage libraries to deliver resources beyond their walls and out to the community.

SECTION C - PROFESSIONAL DEVELOPMENT

2010 is a reinvention and development year for the WVLS technology staff. Certain areas of training will be targeted during the next three years which will focus on basic centralized services and infrastructure management. Monitoring and maintaining critical network equipment, accessing virtualized server and client environments, remote desktop support tools, centralized security product management, and modern operating system and computer hardware maintenance skills are all areas that will be encouraged for professional skills development. Opportunities will be explored and even created for WVLS staff and will also be made available to member libraries' staff.

Categories of learning opportunities for 2010 technology skills development

- Online or in room classes
- Conferences and seminars
- WVLS sponsored and other events for earning CEUs

List of skills training categories for certain basic technology areas:

- PC Components Repair\Replacement
- Abstract Troubleshooting (process of elimination)
- Windows XP\Vista\7 Administration Proficiency
- Basic Active Directory Management Proficiency
- Productivity tools proficiencies: MS Office, Open Office, Email clients, web technologies

SECTION D - TECHNOLOGY BUDGET

In previous years, WVLS did not maintain an IT budget category. During 2010, the IT Director and the Financial Assistant will track expenditures for IT related services and purchases. Some of these expenses will come from the same accounts they had in previous years during 2010, but will be accounted for and moved into an IT budget for 2011 and beyond.

The cost recovery model that WVLS IT has implemented is a tool to help ensure the sustainability of services and support. Beginning with certain services offered during 2010, a variable surcharge is being added in order to help offset the costs of implementing and managing those services. The initial services, like antivirus, are offered in a competitive fashion and usage of those services is the choice of each individual library. By leveraging agreements with certain vendors, volume licensing capabilities, and a strong knowledge of the IT services market, WVLS is able to offer these services to libraries with a surcharge, and still provide them with a less expensive solution than they could get on their own.

Funds available for IT expenses during 2010, including the initial budget, grants, and monies from historically used accounts for IT services will be approximately \$60,000 to \$70,000 based on information available at the time of writing. This range will be regularly reassessed as more information is available, and an accurate picture of overall IT expenses will be developed as the year progresses. Budget previews and summaries will be added to this document and maintained over time to keep it current.

SECTION E - MILESTONES AND PROGRESS EVALUATION

To progress as a technology leader, WVLS will continually review and assess the IT services it offers, its physical infrastructure, and its durability. Building and maintaining a resilient, sustainable technology program will be a key focus. The creation of the V-Cat Administrator and Information Technology Director roles was a huge step toward that direction. With the goal of maximized services to libraries and support of those services being a dynamic target, setting clear milestones and evaluation markers will be very important to the effort of measuring progress.

The major categories in which we will be establishing goals are:

- Long term computer maintenance and security plans
- Internal documentation archival
- Personnel training and proficiency assessment
- Internal infrastructure status monitoring
- Use of virtualization technologies
- Major ILS goals (see WVLS VCat strategy – Appendix A)
- Budget development and tracking

Progress will be evaluated by WVLS technology staff through peer analysis, assessing member library feedback, and calculating percentage of target goals completed during the year. A strategy to measure progress will be developed, and added to this document, as we come to better understand our capabilities and are able to build a realistic timeline on which to place our milestones.

**Wisconsin Valley Library Service
V-Cat Strategic Plan 2010-2011**

Goal: WVLS will provide residents access to library materials through the maintenance and support of the automation system.

Strategies:

1. Pursue opportunities to enhance and improve the SirsiDynix Horizon product for patrons and staff.
 - Maintain the current SirsiDynix Horizon product while monitoring software and hardware developments from SirsiDynix.
 - Continue to investigate alternative library automation systems.
 - Develop cataloging, circulation, and collection management policy standards while working as a group to simplify and provide consistency of these policies for our patrons.
 - Explore products such as: ie. SirsiDynix Enterprise or AquaBrowser interface, Drupal interface to catalog.
 - Pursue current non-V-Cat libraries to join.
2. Invest in resources necessary to provide training on all aspects of Horizon (including other ILS resources) and catalog maintenance.
 - Develop a "sandbox" (with products such as: Koha, Evergreen, etc.) to create an opportunity for libraries to test products.
 - Develop training materials on the SirsiDynix system, focusing on the areas of circulation, searching, statistical reports, collection management, and cataloging.
 - Provide in-person and online training and support.
3. Seek clear and effective communication strategies for deployment of V-Cat information and alternatives to the current system products.
 - Make appropriate site visits and offer individual consulting services to member libraries.
 - Research and provide books, articles, statistics, or reports to member libraries.

For the most recent version of the V-Cat Strategic Plan please visit our website: www.wvls.org

Wisconsin Valley Library Service V-Cat Migration Committee Strategic Plan 2010-2012

Charge of the committee: The purpose of the committee is to make a recommendation to the V-Cat Council for the next generation of automation system for V-Cat. That includes identifying possible vendors of automation systems, getting complete and thorough cost information, inviting vendors in for demonstrations, and making the final recommendation.

2010

- Improve database structure and enhance searching efficiencies with conversion from Sybase to MS SQL
- Purchase and setup server for Horizon database and HIP
- Purchase and implement backup solutions for Horizon
- Upgrade to Horizon 7.5 and HIP3.2 to resolve bugs and prepare for future improvements to Horizon for the time being
- Explore Enterprise, AquaBrowser, OCLC Local, etc. as an enhancement to the V-Cat online catalog
- Develop and promote a "sandbox" to conduct research on various open source products available. All WVLS libraries would be able to explore these products
- Propose a contract with a third party vendor to clean up and organize database in preparation for migration
- Observe and evaluate progress of SCLS/Koha-LibLime, WFLS/Evergreen, and other libraries open source projects
- Identify priorities in database clean-up and policy standardization
- Begin to standardize policies and any relevant details to simplify migration efforts
- Encourage libraries to develop a funding mechanism to support the migration effort

2011

- Dependent on the results of other libraries' open source projects and development of other ILS systems, evaluate the option of partnering with them for the ILS
- Review possibilities of partnering with other types of libraries for an ILS
- Evaluate ILS vendors and participate in site visits, etc. to update our research
- Continue with planning and preparing for migration
- Evaluate future SirsiDynix upgrades
- Continue to standardize policies and details to simplify migration efforts
- Approach non-V-Cat libraries with the option of joining
- Continue with development of funding to support the migration effort

2012

- Start the migration process

For the most recent version of the V-Cat Migration Committee Strategic Plan please visit our website: www.wvls.org