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# **LIBRARY TECHNOLOGY PLANNING: TODAY AND TOMORROW**

# AGENDA

- Getting Started
- Defining Options
- Making a Plan
- Successful Implementation
- Ongoing Success



# GETTING STARTED

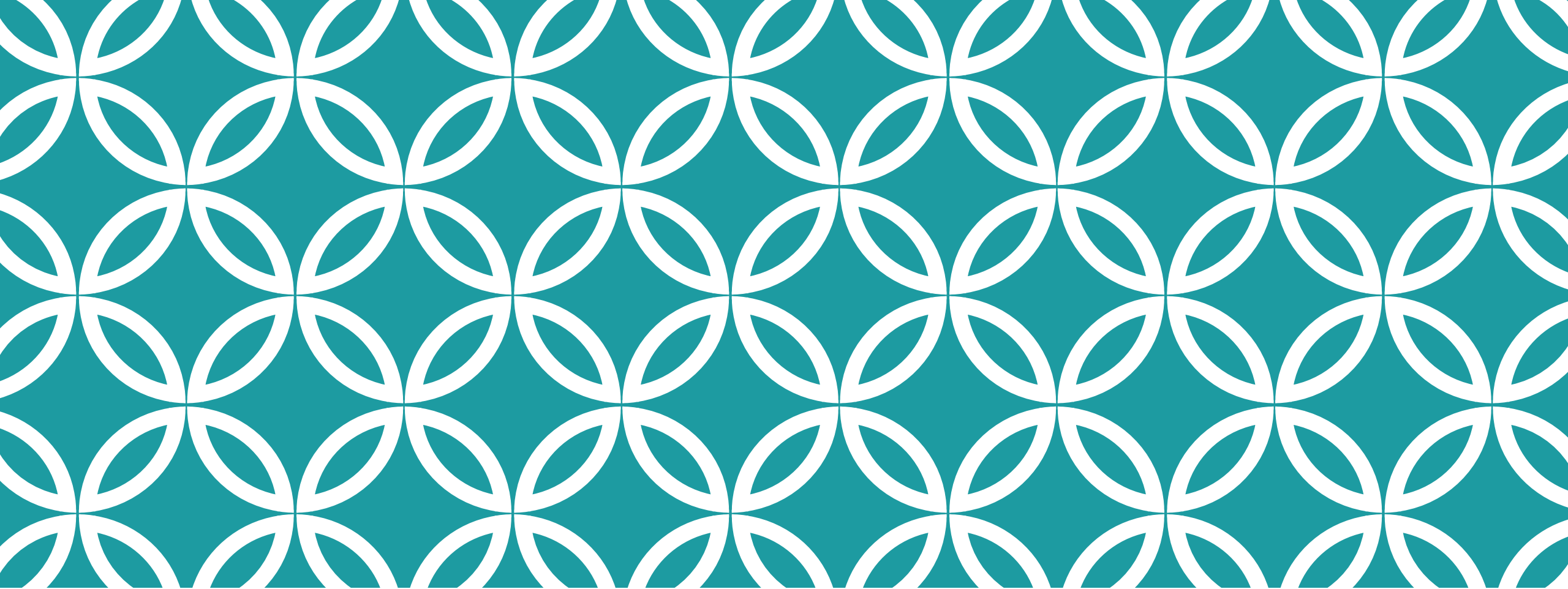
# WHY DOES YOUR LIBRARY NEED A TECHNOLOGY PLAN?

- We haven't had a technology plan up to now, and things seem fine. Why change?
- There's not enough money to add new equipment, so why should we even bother with planning for technology?
- Let's just continue to deal with technical issues as they arise.
- It's easier to "go with the flow" and buy new technology when we have some extra funds.
- The city's (or county's or school district's) IT department handles technology for our library, so we don't need to worry about it.

# ASPECTS OF A TECHNOLOGY PLAN

- Technology assessment
- Community input and the definitions of options
- Goals and outcomes
- Planning (timeline)
- Budgeting
- Criteria for evaluation
- Planning for the future





# **STARTING POINT: TECHNOLOGY ASSESSMENT**

# WHY DO YOU NEED A TECHNOLOGY ASSESSMENT?

- Replacing technology that is not the highest priority or skipping technology that is in dire need of replacement.
- Buying technology that the library may already have.
- Missing the big picture
- Failing to create buy-in for new technologies.



# WHAT TECHNOLOGY TO INCLUDE?

- Internet Access
- Routers and Firewall(s)
- Hardware (staff and public)
- Software (staff and public)

# EVALUATE CURRENT USAGE

- What statistics do you have?
- What statistics/data do you NEED?
  - Surveys
  - Setting up data collection
- What is the availability of the item? Does this affect its usage?

# WHY COULD TECHNOLOGY BE UNDERUTILIZED? WHY DID USERS/STAFF REQUEST WHAT YOU ALREADY HAVE?

- Does it meet the need of users?
- Lack of promotion
- Lack of visibility
- Lack of proximity
- Limited access
- Is the technology maxed out?







# DEFINING OPTIONS

# START TO IDENTIFY CRITICAL ISSUES

- Software upgrades/Version control with software
- Security
- Compatibility of devices
- Obsolescence or hardware that is approaching the end of its useful life



# GATHERING INPUT FROM COMMUNITY, STAKEHOLDERS, AND STAFF

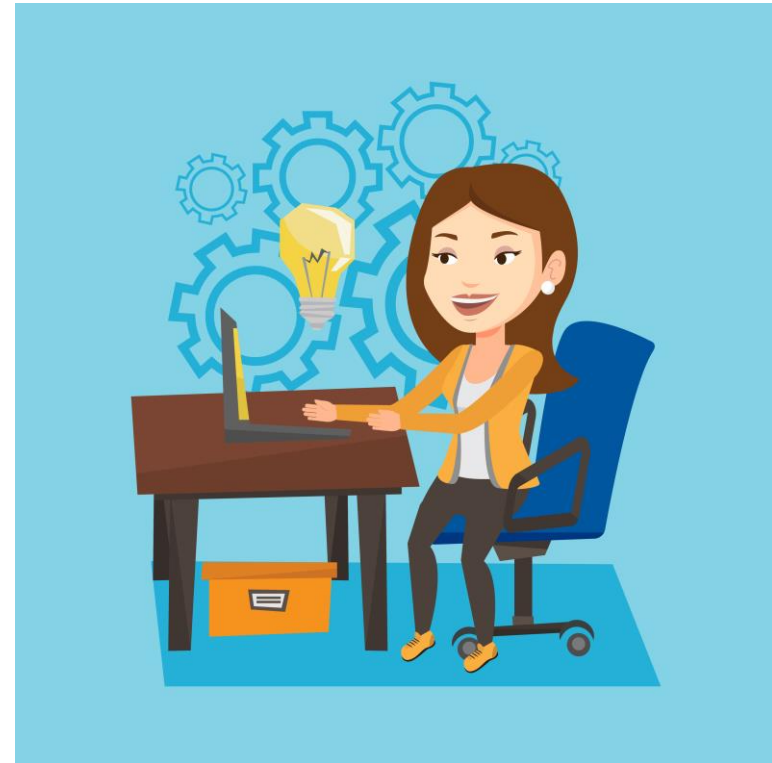


**“UNDERSTANDING LOCAL DEMOGRAPHICS WILL HELP FOCUS  
YOUR TECHNOLOGY PLAN SO THAT IT CATERS TO YOUR  
SPECIFIC COMMUNITY.”**



# CONNECTING YOUR PLAN TO YOUR COMMUNITY

- Who are your users? Who is your community now? How is it changing?
- How is your community changing, and what demographic trends are expected over the next few years?
- Is your community aging? Are families with young children moving in?
- How is your area changing?



# DETERMINING STAFF NEEDS



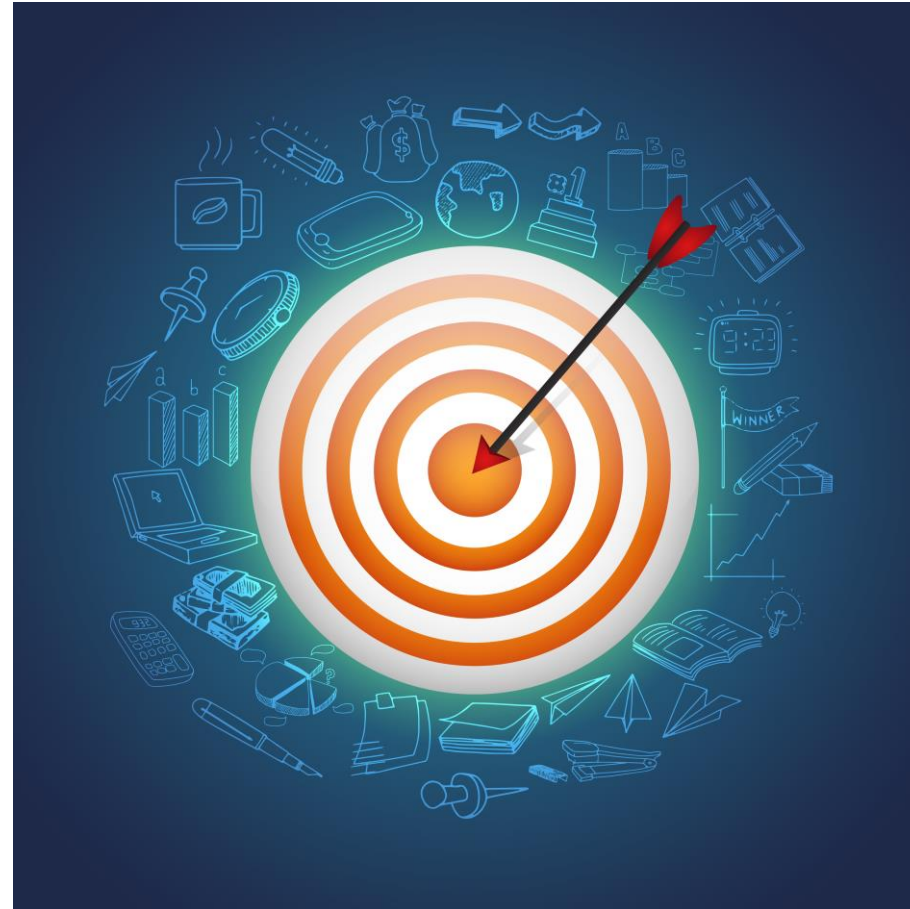
- How do staff needs vary from your users?
- What software does staff need/want?
- How do the needs differ by staff/location in the library?
- How do you plan to gather and understand their needs?



# DETERMINING GOALS

# GOALS AND OUTCOMES

- Goals: 'defines the destination.'
- Outcomes: 'the specific and measurable steps to achieve the goal.'



# SAMPLE

## Goals and Objectives

### Goal One: Expand Access

Make our unique collections, experts, and services available when, where, and how users need them.

Shortly after being sworn in as the 14th Librarian of Congress, Dr. Carla Hayden noted that, "The biggest opportunity for the Library is to make its wonderful treasures available to people...make people aware that it is part of their national heritage and that everyone can find something in the Library that relates to them, their classroom curriculum, or where they want to go in life."

This statement aptly describes our aspirations of being not only the world's largest, but also the world's most-used library. In addition to our expert staff and collections, we have many tools at hand to realize this aspiration. Technology provides an opportunity to democratize the Library's collections and services like never before. Strategic partnerships and collaborations can multiply our user base. And where people cannot come to Washington, D.C., we can bring some of the magic of experiencing the Library to them.

Given the diverse needs and geographic dispersion of our users, we will continue to improve our existing offerings while seeking new and innovative ways for people to interact with the Library.

#### **Objective 1 Increase Discoverability**

We will make our collections, experts, and services more readily discoverable and available for users, whether visiting Washington, D.C., or accessing the Library remotely.

#### **Objective 2 Use Connectors To Extend Reach**

We will work with partners to promote our collections, experts, and services to their networks.

#### **Objective 3 Expand Physical Presence**

We will proactively bring elements of the Library to the American people and enable broader use of our collections, experts, and services.

Source: <https://www.loc.gov/strategic-plan/goals-and-objectives/>

# HOW DOES THE SPECIFIC TECHNOLOGY MEET YOUR GOALS?

Example:

Standardize and boost user support for technologies within the library.

Outcomes:

- Increase Patron Computer Usage by 20%
- Increase Database Usage by 15%
- Standardize versions of software within the library

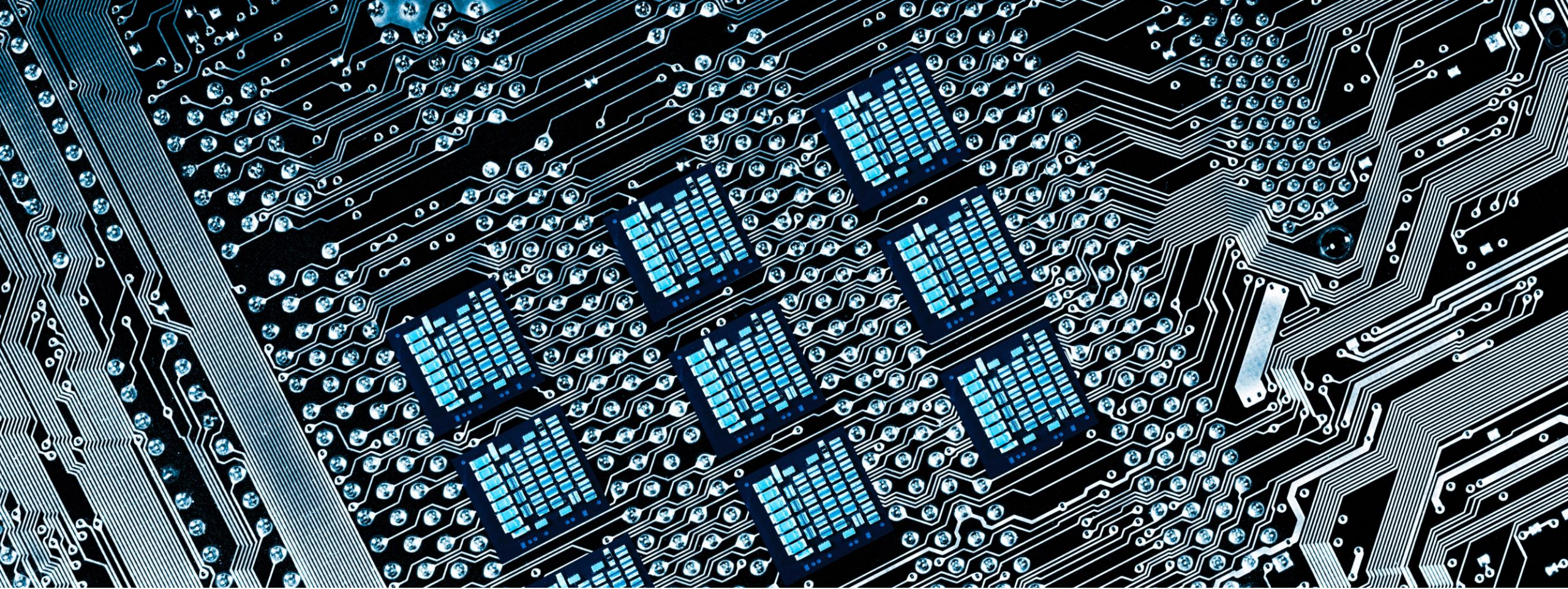






# **EVALUATING TECHNOLOGY**





**WHAT GAPS DID YOU SEE THAT NEED TO BE  
PRIORITIZED?**





**DO YOU SEE SIGNIFICANT TRENDS WITH YOUR  
STATISTICS?**

# ANALYZING LARGER TRENDS AND HOW THEY FIT **YOUR LIBRARY'S** NEEDS

Mixed Reality

Cybersecurity

Makerspaces

Mobile

STEAM

Innovative technologies

Smart Assistants

Robotics

Resources for:

Small business/entrepreneurial tools

Workforce Development

Homework Help

Basic Digital Literacy

What other trends do you see? For this year? Within five years?

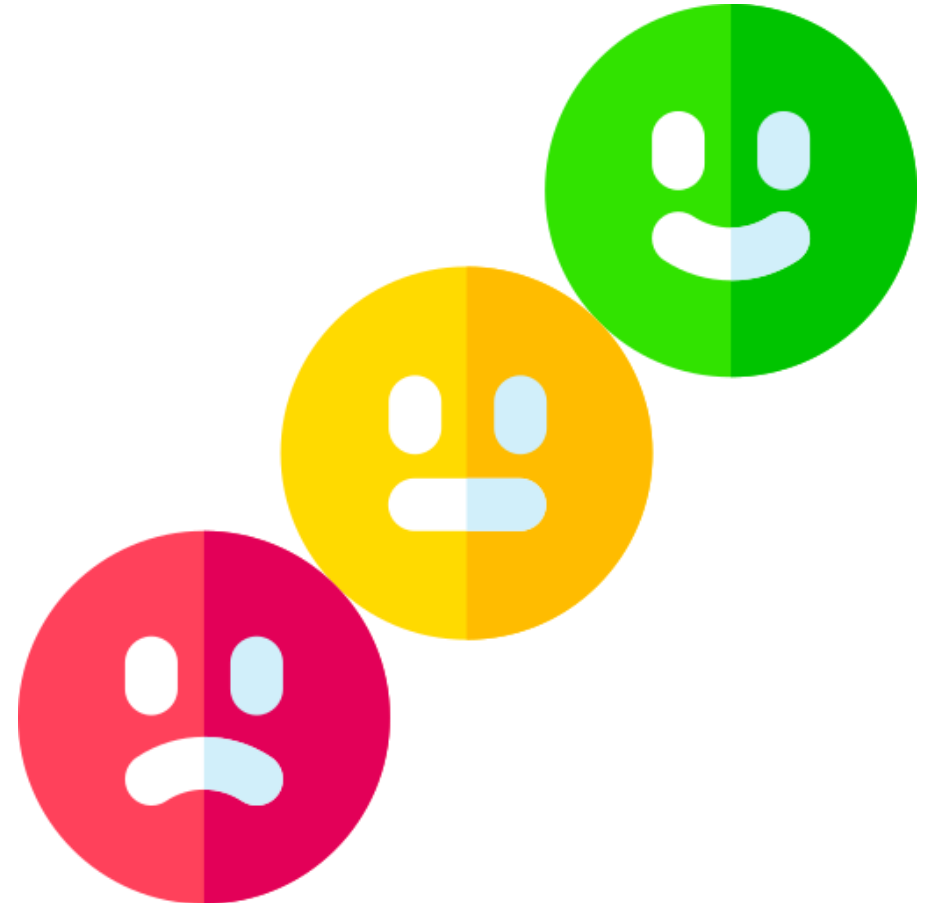
# ASSISTIVE TECHNOLOGY

- Are you meeting the needs of seniors, disabled users?
- What specialized hardware, software do you need?



# EVALUATING TECHNOLOGY

- Usability
- Performance
- Price
- Quality of technology itself
- Warranty
- Support
- Quality of the final product





# **BUDGETING**



# HOW DOES PURCHASING WORK AT YOUR LIBRARY?

- What are the overall procedures and deadlines?
- Do you need to bid?
- Is there a contracted company?
- Do purchases go through a different department?



# IDENTIFYING EXPENSES: ONE TIME/ONGOING

- SaaS
- Hardware
- Staff
- Maintenance (internal or outsourced)
- Connectivity Bandwidth



The key to success is to ensure the technology has the infrastructure to thrive.



# ASSOCIATED COSTS TO CONSIDER

- Furniture
- Building Modifications
  - Construction
  - Technology Infrastructure
  - New Electrical Needs
- Launching Costs



# FINDING FUNDING

- Local Government
- Library
- Larger Institution

## Outside the box

- Grants
- Community & Strategic Partnerships
- Crowdsourcing (Pros and Cons)

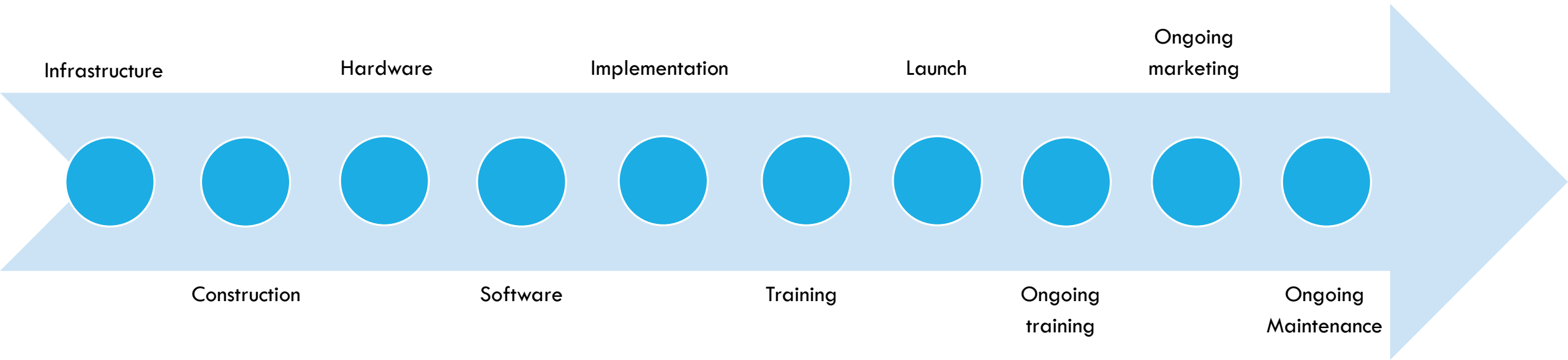






# **MAKING A PLAN**

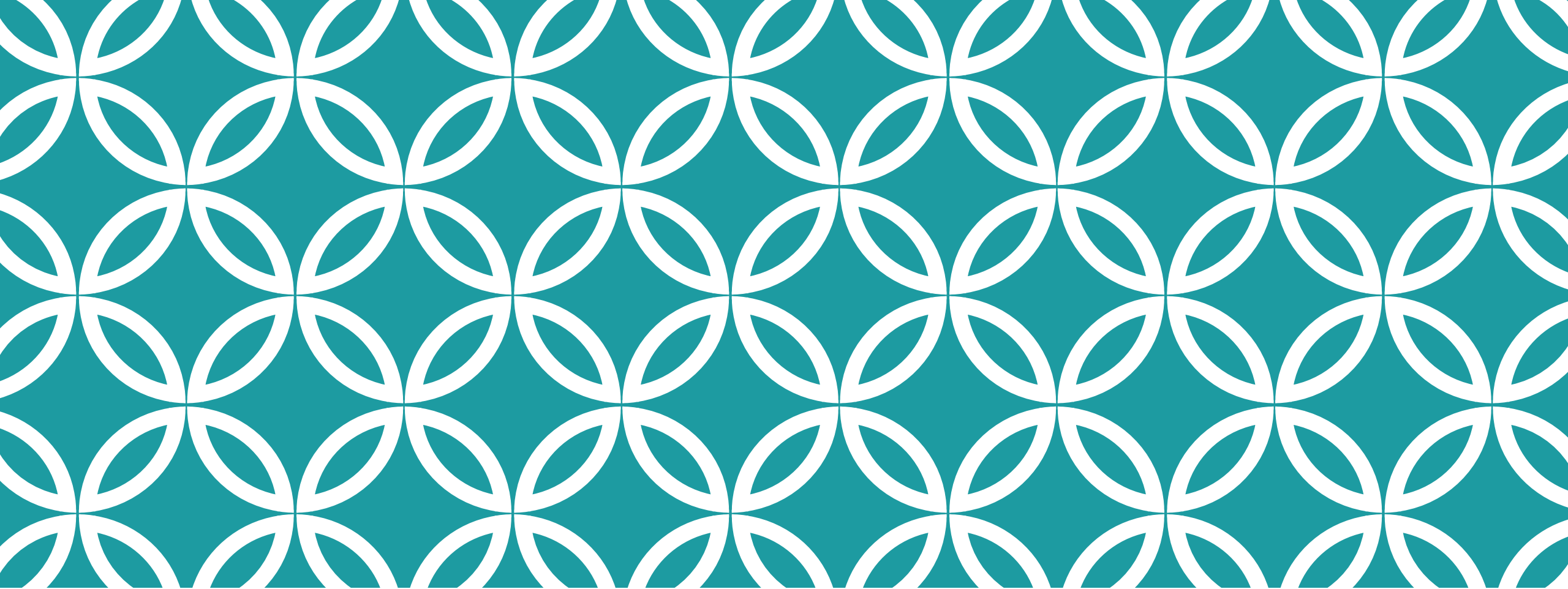
# LOGISTICS TO INCLUDE



# LOCATING TECHNOLOGY IN THE LIBRARY

- Who is your target audience?
- What noise level is expected?
- What foot traffic will the new technology generate?
- Will the technology lend itself to collaborative work?
- Do you want to highlight the technology?
- How will people find it?





**SUCCESSFUL IMPLEMENTATION**

# ASSIGNING TASKS

- Each item on the timeline needs to be broken into specific tasks
- Who is responsible for each component task?
- Provide deadlines for each step, so the plan can move forward
- Create 'checks' to ensure the project is on schedule
- Large implementations
  - Project Management Software
  - Calendaring Software



# COMMUNICATION IS KEY

“When staff, users or stakeholders are left on their own to figure out what is going on, the result can be a lack of buy-in, general confusion, and—even worse—the circulation of misleading information. A new development, such as when the children’s department will get new computers, should not be a mystery to anyone. Avoid situations where staff can only shrug their shoulders in response to questions from library users. Transparency is important beginning with the earliest steps in developing a technology plan; it’s even more vital during the implementation phase.”

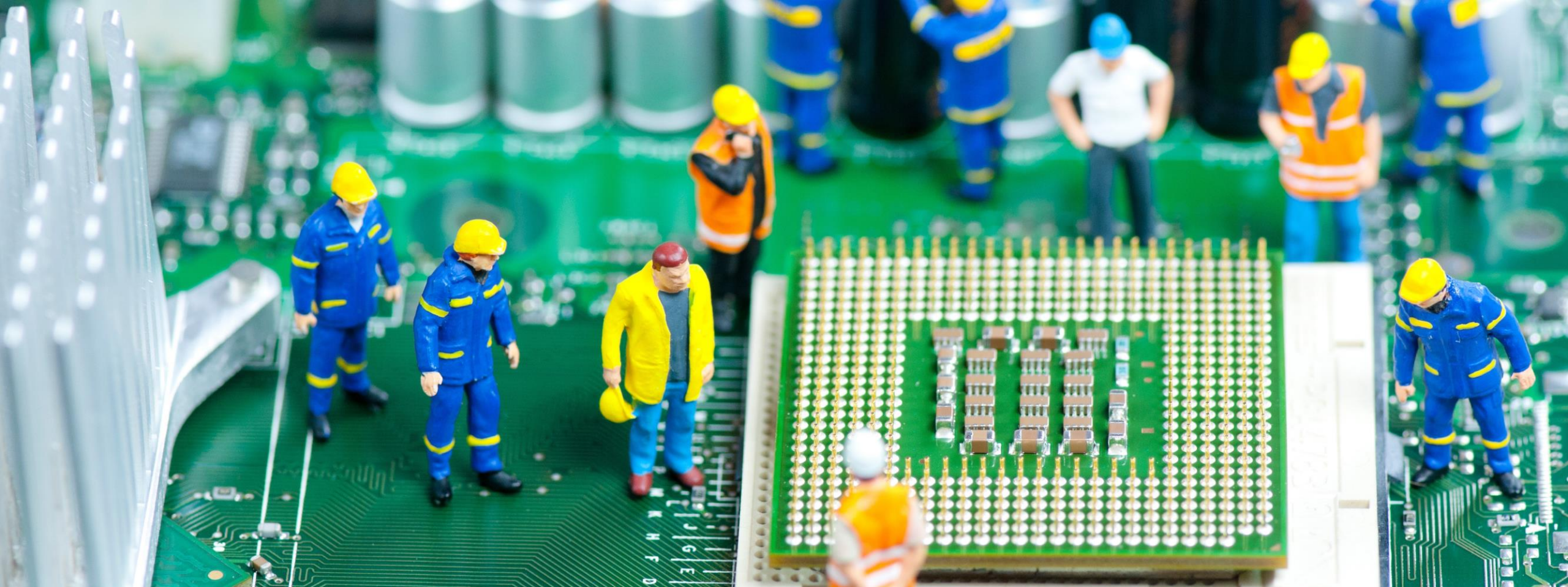


**BUILDING SUCCESS INTO THE PLAN: MAINTENANCE,  
MARKETING & TRAINING**

# TRAINING

- Without ongoing training, technology is often underutilized
- Decide who needs to be trained and at what level
- Explore: hands-on, online, and self-paced
- Creating accountability with staff
- Training should be ongoing





# MAINTENANCE

# CREATE A MAINTENANCE CHECKLIST

- Daily
- Weekly
- Monthly
- Quarterly
- As-needed

\*\* Assign Responsibility for each item.

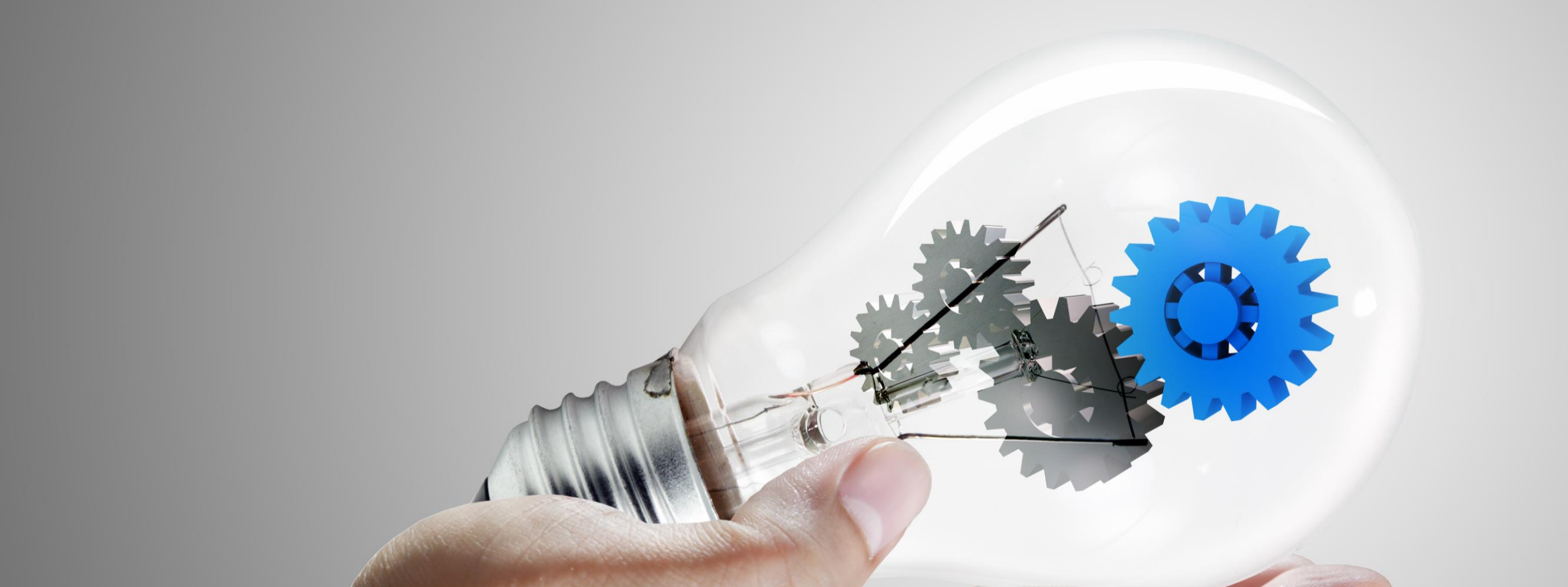






# MARKET SERVICES





# WRENCHES IN YOUR PLANS



# ONGOING EVALUATION

# GATHERING STATISTICS

- Set-up before or during installation
- What analytics do you need from each technology?
- How can this information be collected?
- Collect Regularly

# CONTINUALLY EVALUATE: AM I MEETING MY GOALS

- User Feedback
- Usage Statistics
- Anecdotal Evidence
- Training Numbers



# SEEING ISSUES? WHAT IS THE REASON?

- Training
- Maintenance
- Charging
- Audience
- Location
- Marketing



# PLANNING FOR THE FUTURE

- Use your technology assessment as a living document
- Document recommendations for next time
- Add who worked on the plan
- Add a timeline for the next plan







Contact me with  
questions!



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Roman & Littlefield

30% off discount code: **RLFANDF30**

