

## Technology Planning

It's time to revise, update, or rewrite your Technology Plan. Most of you will probably only need to make a few changes in your existing plan.

### Elements of a Technology Plan

The FCC has stipulated that requests for discounts must be based on an approved technology plan. To ensure that schools and libraries are prepared to effectively use the requested services, applicants must certify that their requests are based on approved technology plans that include provisions for integrating telecommunication services and Internet access into their educational program or library services. Most schools and libraries have already developed such plans and may only need to modify these existing plans slightly to conform to program criteria for technology plans.

To qualify as an approved technology plan for a discount and to meet the requirements of the FCC's Fifth Report and Order (FCC 04-190, released August 13, 2004), the plan must contain the following five elements:

- ❑ The plan must establish clear **goals** and a realistic **strategy** for using telecommunications and information technology to improve education or library services;
- ❑ The plan must have a **professional development strategy** to ensure that staff know how to use these new technologies to improve education or library services;
- ❑ The plan must include an **assessment** of the telecommunication services, hardware, software, and other services that will be needed to improve education or library services;
- ❑ The plan must provide a sufficient **budget** to acquire and support the non-discounted elements of the plan: the hardware, software, professional development and other services that will be needed to implement the strategy; and
- ❑ The plan must include an **evaluation process** that enables the school or library to monitor progress toward the specified goals and make mid-course corrections in response to new developments and opportunities and they arise.

You must begin writing or revising your plan before you file a Form 470. **Document** the date you begin your plan. For example, "Tech Plan draft begun Oct. 1, 2009." Budget numbers may be a proposed budget. The plan does not have to be approved until the start of the new funding year (July 1, 2010).

Some examples of technology plans are found on our website

<http://www.georgialibraries.org/erate>

When your plan is completed and approved by your board (if required), send a copy in Word (.doc) to either Tim Daniels ([tdaniels@georgialibraries.org](mailto:tdaniels@georgialibraries.org)) or Richard Brock ([rbrock@georgialibraries.org](mailto:rbrock@georgialibraries.org)). An approval letter will be sent to you.

## Tech Plan Example

### **Mission**

It is the mission of the Forsyth County Public Library "to provide access to materials, information, and programs delivered by a courteous and informed staff to all members of the Forsyth County community." This mission statement was approved by the Library Board of Trustees on February 14, 2000.

Technology-related goals in support of this mission include:

- I. Provide remote and on-site access to information resources and library programs and services utilizing available state-of-the-art technology to meet the educational, informational, recreational, and cultural needs of Forsyth County residents in a timely, user-friendly, and cost-effective manner.**
- II. Provide technology-related training and development opportunities for staff and for patrons, where appropriate and sustainable.**
- III. Provide technical support and technology needed to achieve public services goals in all departments and to increase efficiency of library operations.**
- IV. Maintain network, server, and workstation security and protect data integrity.**
- V. Maintain an up-to-date and reliable technology infrastructure, workstations, equipment, and software.**
- VI. Protect children accessing or viewing the Internet via the library's Internet connection.**
- VII. Research and pursue specific special projects in support of Goals I-VI Goals and Objectives**

**GOAL I: Provide remote and on-site access to information resources and library programs and services utilizing available state-of-the-art technology to meet the educational, informational, recreational, and cultural needs of Forsyth County residents in a timely, user-friendly, and cost-effective manner.**

#### **Objectives:**

1. Purchase or subscribe to materials in both book and non-book formats, and make them accessible both inside and outside of the library with the assistance of technology when possible.
2. Provide, monitor, maintain, and upgrade as needed a public website or websites to communicate information to the public and facilitate remote and in-library access to online resources and services.
3. Provide, monitor, maintain, and upgrade as needed an Integrated Library System and make use of add-on products and modules to provide patrons with access to information about library holdings, the ability to place holds on and check out library materials, the ability to view full text materials where available, and so forth.
4. Utilize an ISDN or faster telecommunications line(s) to cost effectively connect all branches in order to increase patrons' and staff's ability to communicate with each other via telephone using our own equipment so that we will have to pay for only one connection to service extensions at a branch rather than leasing separate phone lines for every extension at each branch as the library system grows.
5. Allow patrons to call in reference or research questions via the telephone.
6. Provide callers with library operation hours, days of services and basic information through use of an automated answering system.
7. Provide and maintain a 24 hour Automated Telephone Renewal and Notification system to notify patrons of things such as available hold requests and overdue items and allow patrons to call in to renew library materials, check the status of hold requests, and similar public services functions. Provide a Spanish-language option for system prompts.
8. Maintain and upgrade telephone services, systems, and equipment as the library grows and as the budget permits. This includes addition and maintenance of communication devices such as cellular phones, cordless phones, pagers, and/or similar devices where appropriate to provide an effective communications infrastructure in support of library services and programs and access to information resources.
9. Utilize a broadband/high speed Internet connection (preferably 3Mbps or better quality) to provide each branch with Internet connectivity for the purposes of accessing online Library- subscribed and GALILEO

databases and other online resources and allowing remote users to access the library catalog, web site, and online library databases and other online resources 24 hours a day. Increase bandwidth as needed to keep pace with technology and usage.

10. Where possible, use branch to central location fiber optic links, separate T1 links, and/or Quality of Service settings or equivalent to move WAN voice/data traffic quickly between branches. This increases the speed with which library patrons and staff can access the library catalog and other key network resources regardless of their physical location. If this is not possible, utilize firewall to firewall VPN or similarly secured WAN connection over the Internet/GPLS network, preferably at 3Mbps minimum for WAN data traffic only or 4.6Mbps minimum for WAN data and voice traffic. Increase bandwidth as needed to keep pace with technology and usage.

11. Provide public access computers for patrons' in-library use, with at least one public access computer at each branch having screen magnification software and a pointing device designed for the elderly or physically handicapped.

12. Purchase furniture designed to accommodate computer equipment and peripherals.

13. Install wireless LAN technology on a separate "demilitarized" network security zone in all branches to protect network resources while meeting demands to provide patrons and staff with wireless access in areas of the library that are not easily reached by conventional CAT5e or comparable wiring.

### **Evaluation and Assessment of Items Needed:**

All objectives under this goal were being met as of September 2008. However, several projects for improvements and maintenance of effort in this Goal Area are currently in progress or planned to occur over the next 3 years.

A major Website Development Project to re-design and upgrade the public website was completed during the last Technology Plan cycle. With the launch of the new public website, FCPL introduced the concept of Public Website Content Management Workflows, Content Areas, Content Managers, and Content Posters whereby a staff member from the department most likely to generate website content of specific topics is designated the Content Manager for that Content Area of the website and has the authority to select what content gets posted in that Content Area and the responsibility for maintaining the currency and accuracy of content posted in their Content Area. A spreadsheet called the Public Website Content Management Responsibility Matrix was created to formally map out the roles, responsibilities, workflows, and contacts responsible for the content to be posted and maintained on various sections of the website. In this way, every FCPL staff member who may have an idea about content to be posted to the website can easily determine the appropriate contact with whom to share their idea. Database-driven features were integrated into the website design and Content Management Tools were created to empower Content Managers and Content Posters to directly post, edit, and delete content in their Content Areas without IT intervention. Because this new Content Management approach shares out website responsibilities and streamlines the Content Management process, the Library expects that the number of staff suggestions for new website-related services, features, and content will continue to grow, more Content Management Tools and features will be created and integrated into the existing framework, and the public website will be continuously enhanced as a part of normal website operations.

A phone system upgrade and expansion took place late in 2006 through early 2007 as part of the Headquarters Addition and Cumming Library Renovation building projects. Further expansion is scheduled to occur in conjunction with the building of the next two branch libraries at Hampton Park and Post Road. Planning for this expansion is currently underway. Funds needed for the technology infrastructure to support the telephone system expansion to include the Hampton Park Library are included in the Hampton Park Construction budget, and a similar funding request has been submitted as part of the Post Road Construction budget request. Current phone system settings have been documented and two possible approaches to the expansion project are being planned (an ideal and a contingency plan, dependent upon actual funding). As with Hampton Park and Post Road, when planning to build future branch libraries, funds must be included in the building project budgets for design consultation and purchases of equipment and services required to continue to support the voice and data network infrastructure.

Currently, the library branches have wireless access for both patrons and staff, including wireless printing. The

rest of the FCPL network is protected from wireless traffic through use of a wireless controller functioning as a firewall, VLANs, and four separate firewall zones to separate various servers from each other, the Internet, and the rest of the network. The construction budget and building plans for the Hampton Park Library provide for the infrastructure required to support comparable secure access at Hampton.

The Library evaluates non-book collections each year in conjunction with the budgeting cycle and makes decisions regarding the phasing out of “aging” formats and/or the introduction of new ones. When appropriate, additional funds are allocated to assist in the start-up of a collection in a new format. Other times, it is possible to reallocate funding from one format to another during a period of time for phasing out an old format and phasing in a new one. Collection formats that have begun being phased out over recent years include audio cassettes, floppy diskettes, and VHS videos. Examples of formats being phased in include DVD’s and CD’s. Since FY2006, the Library has also introduced digital audio books and downloadable music to the media mix. The introduction of new media and formats and the phasing out of retiring media and formats is an ongoing process, requiring re-evaluation with each budget year. The Library strives to remain responsive to patron needs and desires on this front.

The migration of the Automated Telephone Renewal and Notification System to a new product, Tele Messaging III (TM3), went live on November 3, 2008. This new product allow for patrons to use the Automated Telephone Renewal and Notification System to reserve a public PC for a specific time in advance of their visit to the Library. The upgrade also supports an additional future option for patrons to receive notices via text messages to their cell phone or similar device. These changes will help to keep library services in line with changing patron expectations.