CHECKLIST FOR A LIBRARY TECHNOLOGY PLAN

A good technology plan:

- is based on broad participation and ownership by the library, its board, patrons, and others in the community consuming the library’s technology services
- is consistent with the perspective of the long-range plan already established by the library
- has long-term goals (up to three years) and realistic short-term goals (six months to one year)
- includes assessment of the current status of library staff knowledge, skills and abilities
- includes assessment of current facilities, hardware, and software
- includes not only assessment of hardware and software, but also assesses items such as connectivity, materials, policies, and procedures
- has the support of the board, the administration, and any funding bodies
- recognizes the full spectrum of user needs and expectations and allows for differences
- has a staff development/training plan to build levels of expertise
- recognizes changes in staffing patterns and budget allocations necessary to implement new technologies
- considers what it will take to maintain the equipment and other technology products
- recognizes a life cycle for hardware and software and anticipates updates and replacement
- has an explicit and well-defined evaluation component
- provides for periodic review of needs and plans, while allowing for revisions
Technology Plan Workbook Guide

Technology plans can be as comprehensive or as simple as your library requires for its internal work and meeting the needs of the community. Library technology plans emerge from your community assessment, service responses, and long-range plan, including mission and goals. At a minimum, in order to be certified for E-rate eligibility purposes, a technology plan must:

1. **Establish clear goals and a realistic strategy for using telecommunications and information technology to improve library services.** To formulate the technology plan goals, examine each goal in your long-range plan and determine if telecommunications and information technology can be used to meet the goal. Describe how telecommunications or technology will be used, the service that will be provided, and the strategies that will be used to provide the services.

   - What are we trying to do for our client community with our electronic resources?
   - What services do we wish to offer that require technology?
   - How are we going to provide these services?

2. **Have a professional development strategy to ensure that staff knows how to use these new technologies to improve library services.** Develop your professional development strategy based on your goals and strategies (#1) and new technologies, services, hardware, software (#3).

   - How, when, and on what topics will we train staff in new technologies and in providing new services using technology?
   - What are the specific resources and strategies that you plan to implement to ensure that your staff is ready to use and maintain the telecommunications and information technologies?
   - Who will be in charge of coordinating the professional development activities?
   - What professional development opportunities and resources exist for your technical staff?
   - Do you have the resources in house to train these staff members or do they need to go to outside courses, or a combination of the two?
   - What financial and time resources exist to keep the staff up to date in learning about new technologies?
   - What professional development opportunities are available from outside sources (such as service providers, courses at institutions of higher education, conferences, courses delivered via distance learning or over the Internet; courses sponsored by your state education or library agency)?
3. Include an assessment of the telecommunications services, hardware, software, and other services needed to improve library services.

- What do we have now and how are we using it?
- What do we need to acquire to provide the services described in #1?

4. Provide for a sufficient budget to acquire and support the non-discount elements of the plan: the hardware, software, professional development, and other services that will be needed to implement the strategy.

- How is the library prepared to supply any funding not covered by discounts from the E-rate program?
- How will we pay for these products and services and the maintenance of them?

5. Include an evaluation process that enables the library to monitor progress toward the specified goals and make mid-course corrections in response to new developments as they arise.

- How frequently will you update the plan?
- Who is responsible for updating the plan?
- How will you determine if the technology plan was successful in meeting the goals of your institutional plans, i.e. your school improvement plan or your library service plan (e.g., interview/survey staff, patrons, other stakeholders; measuring progress made towards the benchmarks you set out in your goals; observations)?
  - What goals and objectives of the technology plan were you able to meet? To what extent?
  - Were there any unexpected outcomes or benefits to having the technology in place?
  - What goals and objectives of the technology plan did you not meet? Why? Are there ways to overcome these barriers?
- Are there other needs that have emerged since you last wrote/revised your plan? If so, what are they?
- Are there any goals and objectives that are no longer relevant to your situation and should be deleted from the plan?

After this section, you will find a SAMPLE Technology Plan which will guide you in filling out your library’s technology plan. A TEMPLATE FOR THE TECHNOLOGY PLAN CAN BE FOUND AT THE END OF THIS GUIDE. You may choose to write in short, descriptive phrases OR in paragraph form if that helps you to better convey portions of your plan.
Additional technology plan assistance may be found at the USAC’s website: 
HTTP://WWW.UNIVERSALSERVICE.ORG/SL/APPLICANTS/STEP02/

USAC (Universal Service Administrative Company) administers the Universal 
Service Fund. The Schools and Libraries Program of the Universal Service 
Fund makes discounts available to eligible schools and libraries for 
telecommunication services, Internet access, and internal connections.
NM Town Public Library
Sample Technology Plan
July 1, 2013 - June 30, 2016

Part 1: Technology Mission/Goals and Strategies of the Library:

A. This library’s Sample technology mission:

NM Town Public Library is a community center serving a diverse population as a resource for leisure, knowledge and learning. Library programs and services are provided equitably in an atmosphere that is friendly, responsive, comfortable, and accessible. The NM Town Public Library champions every person’s right to information and resources.

B. Sample Goals for purchases and acquisitions that will improve library services are:

- To promote the mission of the library through the strategic use of information technology.
- To provide free public access to the electronic information resources.
- To utilize technology to increase efficiency and convenience of library functions.
- To educate the community in the use of information technology.

In FY 2013-2014, the library will acquire:

1. Server
2. Networking software
3. Two desktop computers
4. One laptop
5. Two laser printers

Which will provide this service:

1. Change from paper-based circ system to automated system.
2. Change from paper-based circ system to automated system.
3. Change from paper-based circ system to automated system.
4. For public use in-house and check-out availability
5. Additional printing capacity for staff and public etc.
In FY 2014-2015, the library will acquire:

1. Two Dell Optiplex Desktop computers
2. Scanner
3. Fax machine at reference desk
4. etc.

Which will provide this service:

1. For replacement of aging computers
2. Better quality library publications and for public use
3. Improved service of off site customers and for public use
4. etc.

In FY 2015-2016, the library will acquire:

1. Server
2. Updated online catalog module software
3. 1-800 phone line
4. Large format copier
etc.

Which will provide this service:

1. Upgrade replacement for aging online catalog machine
2. Increased public access to library holdings
3. Increase service to rural customers
4. Better service for customer/staff copying large materials etc.

Part 2: Assessment of Current Status

Current Computer Equipment/Services

1. Four desktop computers
2. Two laser printers
3. One Pentium 100 MHz etc.

Is Used for This Service:

1. Public access to Internet, catalog, databases, software applications
2. One in staff area for processing, one for public
3. In staff area for processing etc.
Part 3: **SAMPLE Professional Development Plan**

Staff will be trained to use new technologies in these ways:

All staff will be provided in-service training in technology. State library training and other regional training will be utilized when available. Professional trainers will be hired for in-house training on specific software applications twice a year.

Part 4: **Sample Budget**

The library will support its technology goals and acquire its equipment and services through these specific means and budget sources:

Operating budget from the city will be used for most purchases. Some software will be purchased from state aid funds. E-rate will be utilized for wiring, telephones, and Internet access services.

Part 5: **Sample Evaluation**

Progress toward goals will be reviewed on this schedule (dates):

This plan will be reviewed and revised if needed at the spring library board meeting each year.

**By these people:**

The librarian, the library board, and two additional community members will be invited to participate in the evaluation.

This plan will be informally reviewed by staff in an ongoing manner and suggestions for improvement will be brought to staff meetings.
For:

_______________________________________
(Put Name of Your Library Here)

Submitted by:

_______________________________________
(Please include job title)

Date Submitted: _________________

(Use additional spaces and pages throughout as needed. Use short phrases or full paragraphs, depending on your preferences.)

Part 1: Technology Mission/Goals and Strategies of the Library:

A. This library’s technology mission:

B. Goals for purchases and acquisitions that will improve library services are:
In FY 2010-2011, the library will acquire: Which will provide this service:

1. 
2. 
3. 
4. 
5. etc. 

In FY 2011-2012, the library will acquire: Which will provide this service:

1. 
2. 
3. 
4. etc. 

In FY 2012-2013, the library will acquire: Which will provide this service:
Part 2: Assessment of Current Status

Current Computer Equipment/Services

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<thead>
<tr>
<th>Current Computer Equipment/Services</th>
<th>Is Used for This Service:</th>
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Part 3: Professional Development Plan

Staff will be trained to use new technologies in these ways:

Part 4: Budget

The library will support its technology goals and acquire its equipment and services through these specific means and budget sources:

Part 5: Evaluation

Progress toward goals will be reviewed on this schedule (dates):

By these people: