

Strategic Plan for Library Automation Systems

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Scope

This document describes strategic plans for library automation over the next three years. Relationships to University strategic planning efforts are examined. Though technologies, needs, and goals will change with time, this plan identifies methods to routinely assess strategic goals of library automation and implement timely responses to changing needs.

Relationship to University and Library Strategic Plans

The strategic plan for library automation systems focuses on delivering electronic content and documents via the campus network. It will improve access to library resources and services both virtually and temporally. Ongoing development of Project Access will provide access to enhanced digital content and materials worldwide. Development of the Haley Information Center will continue to provide access to these materials using computers within the library building. Development of the campus network outside the library building will enable access to digital library resources and services 24 hours a day.

From *Expanded Statement of Institutional Purpose Rev: 3/19/97: Page 3.*

3. Develop and support a plan to **acquire and appropriately utilize information resources technology in the delivery of both academic and support services. Provide widespread access to technology among students and faculty.** Encourage the innovative use of technology in teaching and scholarship.

From *PLU 2000, Part III, The PLU 2000 Action Plan: Authorized Initiatives*

- I. Strengthening the Learning Community
 5. Shape staff and faculty development programs to:
 - c. **Raise the level and quality of support services.**

V. Supporting the Enterprise

4. **Develop a plan to acquire and appropriately use technology in the delivery of both academic and support services.**

The Technology Initiative (Appendix 1) identifies goals and sets priorities for:

- ✓ Access to academic resources including books, databases, and electronic publications;
- ✓ Opportunities for distance learning and study abroad;
- ✓ Ongoing mechanism for evaluating and responding to changes in technology.

External Factors Committee (Appendix 2)

[SC will provide when finalized]

Library Vision Committee (Appendix 3)

[PO will provide when finalized]

Project Access (Appendix 4)

[JB will provide when finalized]

Haley Information Center (Appendix 5)

[SC will provide when finalized]

Vision Statement

Library automation systems will provide selected bibliographic and digital access to information in a variety of formats including print, magnetic, film, optical, and digital forms. PLU students, faculty and staff will have convenient, 24 hour access to online digital library resources and services. They will be enabled with tools and competencies to access, retrieve, evaluate, and use information. Recognizing that library staff are key to delivering services, we will enable and empower staff with computers, communications, and competencies, enabling them to provide

quality services and accomplish library goals. We will provide timely and responsive technical support services to develop, maintain, and support patron services and library operations.

Guiding Principles & Values

To support the vision, we draw on the following guiding principles and values:

- ◆ We are accountable to PLU students, faculty, and staff and seek their input and guidance for evaluation, planning, and continuous improvement.
- ◆ Patron service and education are the primary goals of library automated systems. Customer satisfaction (of both patrons and library staff) is our key measure of success.
- ◆ We strive to maintain and improve access to information in a variety of formats through ownership of materials, online access, interlibrary loan request from other sources, and delivery in print or online.
- ◆ We develop resources, services, and information distribution strategies with careful consideration of maintaining and improving equitable access to these resources and services, especially with respect to the Americans with Disabilities Act (ADA).
- ◆ We support and promote intellectual protection and freedom in the spirit of:
 - the Copyright law of the United States (<http://lcweb.loc.gov/copyright/>)
 - the Digital Millennium Copyright Act (<http://www.arl.org/info/frn/copy/dmca.html>)
 - the American Library Association's (ALA) Bill of Rights (<http://www.ala.org/work/freedom/interp.html>)
 - American Library Association's Intellectual Freedom guidelines, especially the *Policy on Confidentiality of Library Records* (http://www.ala.org/alaorg/oif/pol_conf.html)
 - American Library Association's *Access to Electronic Information, Services, and Networks* (<http://www.ala.org/alaorg/oif/electacc.html>)
 - American Association of University Professors *Academic Freedom and Electronic Communications* statement (<http://www.aaup.org/statelec.htm>)
- ◆ We encourage, promote, and participate in resource sharing projects and enhanced delivery mechanisms among libraries and institutions.
- ◆ We promote partnerships among Information Resources units, other university units, and library consortia. Our goal is to add value to these partnerships and to contribute to the success of our partners.
- ◆ We recognize and support the importance of professional development for staff in using information technology and tools to provide patron services.
- ◆ Patron/staff comfort and ergonomic design will be considered in designing workspaces and purchasing equipment, furniture, and peripherals.
- ◆ Library databases, information, and knowledgebases are important strategic resources and will be protected by appropriate backups and security. We attempt to adhere to library and university data standards to maintain data portability among systems.

Mission Statement

The mission of library automation systems is:

- to provide a cohesive package of library services to library patrons in the library building and online, by coordinating computers, communications, content, and staff competencies.
- to maintain and improve access to worldwide library resources and services via library automated systems.
- to provide digital tools for library patrons to access, retrieve, evaluate, and use information resources.
- to support library operations in the acquisition, organization, and dissemination of information resources.
- to secure and protect library information technology, knowledgebases, and databases.
- to provide technical support services for planning, implementing, and maintaining library information technology resources.

Strategic Issues and Plans

Status Key: ○ = not started, ◐ = partial, ● = done, ★ = ongoing

Developing the Infrastructure for Information Technology

To progress with implementation of further information resources technologies and services, basic infrastructure issues such as electrical power, networking, space, and furniture need to be upgraded.

To accomplish this we will:

- ★ Develop servers for distributing information resources, printing documents, requesting and delivering services, and providing system support.
- ★ Build a network to support patron services, staff workstations, patron access via laptop within the library, and classroom access to library resources. (*Staff areas complete; patron areas in progress*)
- ◐ Plan and install ergonomically designed furniture for patron and staff workstations. (*QUEST workstations completed ~1995; other areas in progress*)
- Upgrade electrical power system to accommodate additional workstations and equipment. (*Completed Spring 1999*)

Addressing Equipment & Software Functionality and Obsolescence

An equipment replacement cycle needs to be set up and supported with a replacement budget for library systems hardware, software, and peripherals.

To accomplish this we will:

- ★ Regularly reassess needs when developing initiatives, goals and objectives, and budgets.
- ★ Develop computer and equipment replacement cycles, budgeting for yearly replacements over the cycle.
- ★ Upgrade workstation hardware by adding RAM, hard disk space, etc. as appropriate.
- ★ Upgrade workstation software as needed, considering a balance among functionality, costs, and training issues.
- ★ Provide staff training in new hardware and software modules.
- ★ Continue upgrading operating system, database, and library system software.
- ◐ Migrate to a client/server architecture while upgrading hardware that has reached the end of its life cycle.
- ◐ Replace staff terminals and barcode readers with networked workstations and laser scanners. (*In progress with targeted completion Summer 2000*)
- ◐ Upgrade printing services to include black and white as well as color options. (*Copy machine analysis in progress*)
- ◐ Provide workstations, software, and peripherals to access network and library resources and meet needs described in the Americans with Disabilities Act (ADA).
- Replace patron terminals with networked workstations. (*Completed Fall, 1999*)

Migrating to Graphic User Interface and Client/Server Architecture

The present generation of library automated systems use a client/server architecture. Such systems require workstations for both patron and staff functions.

To accomplish this we will:

- ★ Provide staff and patron training in new hardware and software modules.
- ◐ Increase Haley Information Center workstations for accessing, retrieving, and manipulating information resources.
- ◐ Migrate to client/server system for library automated system.
- ◐ Migrate staff modules such as cataloging and circulation to client/server architecture. (*Complete for PC Reliance, December 1999*)
- Replace PC backup system with client/server model. (*Complete for PC Reliance, December 1999*)
- Migrate as many CD-ROM databases and full-text resources as possible to support web-based access. (*Completed Fall 1999*)

- Implement Z39.50 access to bibliographic database. *(Completed Summer 1999)*
- Install WebPAC server for web-based access to QUEST. *(Completed Summer 1999)*

Improving Access to Local and Worldwide Services and Resources

Installation of a staff and patron network and increased deployment of technology throughout the campus will provide opportunities for improving access to information services and resources. Enhance and expand online resources and services to include bibliographic, full-text, and multimedia content. Explore and implement document delivery options.

To accomplish this we will:

- ★ Expand and develop asynchronous forms-based services such as book order requests.
- ★ Investigate and implement appropriate courier, mail, and electronic document delivery and printing mechanisms.
- ★ Enhance and develop electronic reserves to deliver full text reserve materials via the network.
- ★ Make multimedia archival and media resources available via the network.
- ★ Develop and maintain library staff web site to disseminate library information, policies, and documentation.
- Investigate Z39.50 access to other Z39.50-compliant libraries.
- Implement FirstSearch Direct request and NAPCU reciprocal requests to improve access and reduce turnaround time for requesting materials.
- Implement CLIO to improve statistics management of Interlibrary Loan functions.
- Become OCLC member and identify appropriate patron and staff uses. *(Completed, September 1999)*

Enhancing Library Systems Support

Providing round-the-clock system support is critical to providing library and information resources. Coordinate securing support from internal and/or external providers to maintain equipment, software, applications, and training.

To accomplish this we will:

- ★ Coordinate securing support from internal and/or external providers to maintain equipment, software, applications, and training.
- ★ Cross-train additional staff in workstation and system support to cover increased workstations and systems.
- ★ Provide continuous training for systems staff in new technologies.
- ★ Provide appropriate system support, documentation, training, and reference materials to staff.
- Identify and implement a mechanism for tracking and quantifying system and workstation support requests.
- Develop and make searchable a knowledgebase of system support information.

Appendices [not yet included]

- Appendix 1. The Technology Initiative Goals
- Appendix 2. External Factors Committee Goals
- Appendix 3. Library Vision Committee Goals
- Appendix 4. Project Access Goals
- Appendix 5. Haley Information Center Goals