

**University Libraries
Technology Plan**

2003-2005

Table of Contents

Introduction	3
University Libraries Vision	5
University Libraries Technology Vision Statement	5
UL Technology Plan Action Steps	6
Overview of the Planning Process	19
Members of the Technology Planning Group	19

Introduction

Following the University Libraries (UL) Strategic Plan closely, the UL Technology Plan focuses on our most pressing needs as well as those in our not so distant future. The Technology Plan calls for the formation of a Technology Advisory Committee to coordinate technology projects and initiatives and to work within the Technology Plan itself. Several main themes are represented in the Technology Plan: appropriate technology training, accessibility, standardization, communication, restructuring positions to meet our current technology goals, user-centeredness, and preservation. Timelines are provided where appropriate for major actions.

Through a coordinated effort between the Technology Advisory Committee and the UL, we can realize the actions promoted in the UL Technology Plan.

UL has a reputation for excellence—excellent collections; excellent service to the community; excellent participation in local, state and national organizations; and excellence in leadership. The challenges in the years ahead will be to maintain our commitment to excellence, to maintain the unique identity of UL, and to maintain services and collections in times of fiscal challenge and radical change. Teaching, the transmission of knowledge, the production of knowledge, and the archiving of knowledge will always be crucial to our mission. How we sustain our passion for what we do and how we actively participate in the ongoing transformation of higher education will define the organization in the years ahead.¹

UL has established an environment where technology and its applications enhance and improve teaching, learning, research and University operations. With the completion of the BGSuernet Project, the campus has an infrastructure that supports advanced data, voice and video networks. This backbone will support the University's participation in the Internet2 consortium. UL will take full advantage of this infrastructure to provide access to information both within and outside UL physical collection. UL will be challenged and judged by its ability to provide access to information regardless of format or location. As one of the founding members of OhioLINK, UL has assisted in the development of a cost-effective electronic network that provides a partial solution to the information access challenge. Despite UL participation in OhioLINK, the libraries, like university libraries everywhere, are confronted with difficult choices. A few of these are the escalating costs of materials; an aging building on the main campus that is in serious need of repair; nationally-known special collections that should be in a temperature-regulated storage facility; and a redirection from traditional librarian-scholarship to a new set of virtual, dynamic skills.²

The University began the 2002/03 academic year with a headcount enrollment of 20,480 students, the highest in the institution's history.³ These students arrive expecting to learn about and learn with technology. Distance education has become a sustained expectation at the University. Technological training, equipment, and exposure are needed to make the use of technology more effective. The University expects to spend about 18.5 million dollars a year on centralized information technology-related expenses in support of classroom, research, and

¹ http://www.bgsu.edu/offices/ir/unit_plan/llr.pdf ; BGSU LLR, Five Year Comprehensive Plan 2001-2006

² <http://www.bgsu.edu/offices/nca/selfstudy/planning.htm> , NCA Accreditation 2003, Student Success at Bowling Green State University (Planning).

³ <http://www.bgsu.edu/offices/pr/news/2002/Sep02/record.html>, News Release.

administrative needs. This figure is expected to grow in excess of 20 million dollars by 2005 and upward in the years ahead.⁴

UL is one of the many units on campus that commits part of its budget toward technology; to purchase updated equipment, computers, hire support personnel, and acquire specialized software. Students and faculty expect electronic access to information. Patrons are increasingly remote access users. To support students and faculty UL must maintain, add and update equipment, networks and electronic databases. Moving toward a more "virtual future" there is a need for retraining, enhanced computing capabilities, a new approach to information literacy, and a rethinking of the library as "place" that must be assumed.

However, financial resources to support new technology initiatives will most likely be in short supply, as expectations are for continuing weak state tax revenues in the next state operating budget biennium, beginning July 2003. State support for higher education may continue to be flat or reduced, thus it will be difficult for the library budget to counter the impact of inflation. Budget cuts to the state cooperative library service, OhioLINK, will also have a negative impact. Some electronic resources once available at reduced rates because of OhioLINK's combined purchasing power will most likely increase to levels that are not sustainable, based on locally available funds. During this next biennium the libraries will continue to explore technological capabilities that will provide users with new learning environments. Library staff will explore grant-funded opportunities to fund special projects. The Dean of UL will continue to be an advocate for central funding, although reliance on this source alone will most likely fall short of the amount required to support new technology initiatives within the libraries.

⁴ <http://www.bgsu.edu/offices/nca/selfstudy/planning.htm> , NCA Accreditation 2003, Student Success at Bowling Green State University (Planning).

University Libraries Vision

Preserve the Past, Honor the Present, Envision the Future

The faculty and staff of the University Libraries embrace the academic endeavor, the preservation of our cultures and heritage, and the highest levels of service to our community of users. The University Libraries will anticipate and exceed the needs of our users, foster excitement in the process of discovery, and function as a catalyst and participant to advance learning, scholarship and the creation of new knowledge.

University Libraries Technology Vision Statement

University Libraries envision technology as a tool to assist in the preservation of our collections and to enhance services to our users. UL will actively seek out the most up-to-date and innovative applications of library technology.

STRATEGIC DIRECTION: Building a Flexible Organization

Goal Develop a flexible organization with the staffing levels, skill sets, training, and attitudes to meet current and future challenges – to launch innovations that address emerging user needs while maintaining mission critical traditional services and resources key to University faculty and staff success and student retention.

Objectives

Increase total number of UL staff to support the research/curricular needs of the BGSU community and to maintain and enhance mission-critical library services.

Action Steps

- Through Fall 2003, assess and relate LITS positions to current technology goals as articulated in this plan.
- Better utilize the Digital Initiatives position – expand service beyond the Special Collections.
- Seek out funding to provide sufficient staff for the administration, installation, configuration, and troubleshooting of workstation and web server software. Throughout Fall 2003, explore with ITS possible partnerships to provide this function.
- Provide sufficient staff for the setup, troubleshooting, maintenance and repair of existing equipment. In the event that UL is unable to hire additional permanent LITS personnel, investigate options for student employment.
- In order to fully utilize all LITS personnel, standardize software on desktops as much as possible, so that some Desktop Support Specialist duties could be performed by student assistants. Desktop Support Specialist position should be expanded to include additional server support.

Encourage cross-functional and common functional communication between and within library departments.

Action Steps

- By the end of 2003, form a Technology Advisory Committee of individuals from different areas of library – with a LITS representative as a member of the committee. This committee would consider proposals for technology projects, see where those proposals fit into the Technology Plan, and prioritize those proposals accordingly. The committee will then report the technology priorities to the appropriate governing body.
- The Dean's Office will forward any grant proposals involving technology to the Technology Committee for potential integration into the Technology Plan.

Foster a culture of openness, helpfulness, and advocacy within the UL.

Action Steps

- Continue to develop and promote use of the ULStaff web site
- Post LITS minutes to the ULStaff web site
- Expand LITS web site and make it more interactive. Offer online problem reporting, etc.

Create an organizational culture that fosters training and education as a necessary part of the job.

Action Steps

- By the end of 2003, assess and relate personnel certification for UL systems.
- Require LITS personnel to achieve certification on systems particular to UL.
- Identify technological training or educational requirements for UL staff.
- Provide programs to achieve desired competencies.
- Investigate the use of peer training.

Cultivate and support the UL human resources grounded in an understanding of public service, technical service, and technological issues.

Institute organizational changes to accomplish the following:

- *Empower staff to make decisions at the appropriate level.*
- *Eliminate undesirable duplication of functions/processes.*
- *Position the UL to pursue opportunities that are a good fit with its strengths.*

Action Steps

- Assimilate LITS into the current organizational structure.
- Centralize all web development within the Web Unit.
- Hire additional web student employees as necessary – investigate offering a grad assistantship. Begin discussions with Graduate College by Spring 2004.
- Better utilize the Digital Initiatives position – expand service beyond the Special Collections.
- Investigate improvements to the Gov Docs CD system.

STRATEGIC DIRECTION: Achieving Leadership in Information Literacy

Goal Maintain current course-integrated instructional program and work toward increasing the UL's involvement in teaching for-credit courses or modules of such courses in order to enhance the UL's contributions to student learning outcomes, student retention and self-reliant learning.

Objectives

Assess opportunities to strengthen the UL's role in learner-centered instruction.

Action Steps

- Continue to provide technological support and maintenance to ongoing information literacy initiatives (e.g. Dataline BG, First Year Experience, Quick Quest).
- Institute a regular (e.g. every two years) replacement cycle for the Electronic Reading Room to maintain high-functioning equipment for instruction. Redistribute the older equipment to other areas of Jerome Library.
- Institute a regular replacement cycle for the Pallister Conference Room and 210B laptops to maintain high-functioning equipment for instruction.
- Support and maintain servers on which to run assessment tools and other in-house products, such as dynamic databases.

STRATEGIC DIRECTION: Making the User-Centered Library a Reality

Goal Reflect BGSU's core values, aspirations, and strategic priorities by providing user-centered programs, resources, and interactions that deliver specific user-defined benefits to the UL patrons.

Objectives

Investigate options to incorporate recommendations from user input such as survey data analysis in re-vamping current services and in implementing new services.

Action Steps

- Continue to gather input from use studies on UL web site – institute a regular use study schedule by Fall 2003.
- By the end of Spring 2004, investigate alternative ways for users to request materials from the Northwest Ohio Regional Book Depository and Firelands from within the BGSU Libraries Catalog.
- Allow users to submit comments, suggestions, and requests for materials within the BGSU Libraries Catalog for implementation by Fall 2004.
- Continue to evaluate the existing technology based services within the library, and the development of new technology based services, with an eye to the desires of our users, and their usage patterns for these services.
- Investigate the provision of specific user-defined benefits such as more personal control/information in library services.
- Investigate online use study options for remote users.
- Investigate single point logon access for all university resources.

Develop a consistent rationale for what fee-based services the UL will offer and for the price structure of such services.

Action Steps

- Provide insight into the discussion about fee-based services. For example: fee-based policies regarding imaging (scanning, copying, printing, digitizing, recording) services in UL, Electronic ILL/Reserve and Copyright Clearance costs, scanning film based resources into electronic files, paper copying charges, legal and cost requirements for digitization and distribution.

STRATEGIC DIRECTION: Optimizing Information Technology: the Present and the Future

Goal Utilize information technology to enhance and transform delivery of resources, services, and communication central/critical to UL's role in supporting academic plan themes.

Objectives

Develop a technology plan to support mainstream and emerging information technology.

Maintain high-functioning information technology equipment and environmental conditions conducive to learning.

Action Steps

- On an annual basis, ensure that the UL budget includes funding to replace a set percentage of desktops to be determined by UL Council; including server and any expanded access that may be needed to realize other goals. Technology spending will be coordinated between LITS, the Management Advisory Group, the Technology Advisory Committee, and the Budget Office in Fall 2003.
- Consider alternative sites for the computer room.
- Address heating and cooling inadequacies through the replacement of the HVAC system and supplemental HVAC for environmentally sensitive equipment.
- Provide and maintain server support for Integrated Library System.
- Provide and maintain server support for dynamic projects.
- Provide for technological upgrades in instructional spaces.
- Maintain hubs to facilitate wireless access.
- Make all servers run on a minimal number of operating systems? Easier to maintain and replace (swappable).
- In order to fully utilize all LITS personnel, evaluate standardization of software on desktops as much as possible.
- Develop a program for planned replacement of outdated or failing workstations, including criteria for deciding when and where to add staff desktop personal computers.
- Investigate asset management as a way to more efficiently manage desktops in UL.

Maximize technology to design and implement appropriate new user-centered services to add convenience, functionality and cost efficiencies.

Action Steps

- Deliver appropriate library notifications through email – full implementation in Fall 2003.
- Assess and support distance/remote users IT needs, such as information access and materials.
- Explore the statewide institutional repository concept.
- Routinely conduct vigorous usability studies on UL web site.
- Investigate adding a question in LibQual asking what users want from UL technology.
- Achieve full accessibility for disabled users of UL web site (meet ADA and Section 508 standards) by Fall 2004.
- Examine internal processes for the maintenance of UL subscriptions to electronic resources.

- Investigate, initiate, and explore cost efficiencies of providing desktop delivery options for some of our services and resources in Fall 2003.
- Continue to offer online forms via the UL web site and investigate options for automation of some functions (e.g. gathering and assimilating data).
- Investigate online signature options (for submittable forms).
- Investigate how to offer external/internal online resources from a central resource. For example, streaming videos from WBGU and OhioLINK.
- Investigate single point logon access for all university resources.

Support professional development activities for UL staff to enhance their IT skills and to enable them to apply new technological skills.

Action Steps

- By Fall 2004, create budget line for LITS personnel training.
- Assess UL's current and future training needs in Fall 2004.
- By Fall 2005, create budget line for UL personnel IT training.
- Incorporate training for LITS personnel for any new technology launched.
- Make available just-in-time training for UL personnel for any new technology launched (e.g. manuals, online helpdesks, etc. for self-directed learning).
- Make training available in-house for any new campus technology initiative related to library functions (i.e. web content management software, Kronos).
- Develop software competencies for basic UL shared applications.
- Offer software training for UL personnel customized to their actual needs.

Take advantage of automated systems and processes to achieve cost-effective work processes.

Action Steps

- Deliver appropriate library notifications through email - full implementation in Fall 2003.
- Assess technical needs and software competencies based on job responsibilities in Fall 2004.
- Match appropriate hardware and software using information gathered in above needs and skills assessment.
- Assess and support vendor software and subsequent upgrades (e.g. GOBI II).
- Review workflow to take advantage of III upgrades and plan to implement all Millenium III products.
- Evaluate the web content management software for incorporation into the UL web site.
- Continue to maintain and augment the UL staff web site.
- Incorporate use of the MyBGSU into daily UL activities.

Optimize the BGSupernet infrastructure to create and offer technologically advanced products to staff and users.

Action Steps

- Beginning Fall 2003, offer additional digital collections to users via UL web site.
- Ensure that digital collections adhere to emerging input and metadata standards.
- Offer additional streaming video and audio products to users via the UL web site.

- During 2005, seek out ways the Library can lead in grant writing for Internet2 projects, and in assisting the broader university community in Internet2 grant proposals and projects.

Promote the effective use of technology to further partnerships within UL, campus ITS, OhioLINK, vendors and other consortia.

Action Steps

- Ensure UL participation and seek leadership roles in the Ohio Commons for Digital Education.
- Maintain regular and effective communication with ITS concerning campus-supported equipment and initiatives.
- Communicate UL's technology aspirations to the ITS decision-making process.
- Accommodate and incorporate ITS conditional/restrictive support.
- Coordinate UL's technology purchasing/maintenance decisions with ITS purchasing/maintenance decisions.
- Assess and support distance/remote users IT needs, such as information access and materials.

STRATEGIC DIRECTION: Managing Collections and Access

Goal Provide information resources with the most relevant content, highest functionality, and most-convenient formats (including emerging technologies) for teaching, learning, and research for both onsite and remote users. Employ the most cost-effective means available for acquiring collections and providing access.

Objectives

Employ use statistics and user assessment instruments to create collections and access that support curricular and research needs.

Action Steps

- By Summer 2004, investigate and purchase more effective web statistics software or hosting package.

Collect, catalog, and make available a broad range of formats.

Action Steps

- Identify and catalog UL web resources and other digitized items in BGSU Libraries Catalog.
- Continue to ensure copyright issues have been resolved in our undertakings so we can provide materials to the broadest possible audience. (OhioLINK, the world)
- Create UL Digital Library with proposals submitted to Technology Committee.
- Investigate new video and audio product creation and distribution.

Select local purchases (hard copy and electronic) to address needs of our local end users and also to honor commitment to statewide cooperative collection building by concentrating on areas of current collection strength and ongoing curricular relevance.

Action Steps

- By Summer 2004, investigate and purchase more effective web statistics software or hosting package.
- Investigate technological ways of supporting the claims procedure for electronic and digital subscriptions.
- Assess and support vendor software and subsequent upgrades (e.g. GOBI II).

Create, enhance, and maintain high quality bibliographic records for internal and external users.

Action Steps

- In 2004 plan for the implementation of new OCLC cataloging services and additional metadata formats until vendor availability of services.

Develop, analyze and implement strategies to address areas of uncataloged materials not available for research and retrieval via the online system.

Action Steps

- Investigate feasibility of digitization of uncataloged materials.

Manage, evaluate and articulate physical access and preservation needs for all collections.

Action Steps

- Identify and support technologies for UL preservation and access decisions.
- Continue to investigate security, longevity, and maintenance issues of digitized data.

Educate the BGSU community about the challenges higher education is facing in the area of scholarly communication and its impact on libraries.

Action Steps

- Provide insight into the discussion regarding the institutional repository concept.

Enhance access to materials, both print and electronic, by maintaining the integrity of the patron database.

Action Steps

- During 2004 coordinate the implementation of III Millenium software with hardware replacement cycle.
- Plan for the implementation of III Millenium software.
- Investigate single point logon access for all university resources.

STRATEGIC DIRECTION: Pursuing Funding Strategies

Goal Pursue a variety of innovative funding strategies (including but not limited to non-enrollment funding sources) in order to secure a larger and more-stable pool of resources for providing the facilities and resources that foster the passion for inquiry that is the hallmark of an effective learning community.

Objectives

Create, in graphic format, a timeline of major events in the history of the UL to show donors the context for their contributions to the success of the UL.

Action Steps

- Showcase timeline on UL web site.

STRATEGIC DIRECTION: Transforming the Bricks and Mortar

Goal Address inadequacies of decades-old UL buildings for housing and preserving collection, facilitating efficient and effective staff work flows, and providing aesthetically pleasing, comfortable, and functional space for studying, doing research, and obtaining services/consulting with the UL staff.

Objectives

Implement both short-term and long-term strategies for providing a variety of aesthetically pleasing and functionally designed spaces.

Action Steps

- Relocate computer room to provide environmentally friendly space for UL computer equipment.
- Identify which library resources require hands-on manipulation, and which ones might be able to be provided almost as well with remote electronic access.

STRATEGIC DIRECTION: Valuing and Reflecting Diversity

Goal Foster an inclusive, multicultural environment which supports the academic plan themes of multiple realities of a complex, culturally diverse world.

Objectives

Strengthen collections and access to resources that are sensitive to the needs of the disabled, minorities, and individuals from different cultural and/or language backgrounds.

Action Steps

- By Summer 2004 begin to review web site design and user feedback to strive toward cultural sensitivity.
- By Fall 2004 move toward full accessibility of UL web site (meet ADA and Section 508 standards).
- Examine ways that UL is developing Global Library partnerships and relationships, may be able to provide the university with electronic access to cultures and collections previously unavailable.

STRATEGIC DIRECTION: Reaching Out/Reaching Up: Communication

Goal Coordinate, enhance, and emphasize marketing and communication activities on behalf of the UL in order to improve the effectiveness of our dialog with the BGSU administration, other members of the learning community, and the general public. This will help ensure that the UL are an integral part of the flexible, competitive infrastructure necessary to support BGSU's commitment to being a premier learning community.

Objectives

Create, in graphic format, a timeline of major events in the history of the UL.

Action Steps

- Showcase timeline on UL web site.

Create a dialog with the UL users to effectively publicize services/resources and regularly survey user needs.

Action Steps

- During Fall 2004 investigate ways to use the UL web site to publicize services and resources.
- During Fall 2004 investigate various strategies for usability. Endeavor to target those users who do not regularly use the library, either physically or remotely.

Overview of the Planning Process

The library technology plan evolved out of the strategic planning process. A group of six individuals, representing various departments throughout University Libraries, participated in developing the plan. Some of the key points in the planning process included: 1) Establishing a group of people to represent various departments and constituents of the library; 2) Establishing priorities and current projects; 3) Gathering data and identifying present and future needs; 4) Establishing a flexible and active plan.

Members of the Technology Planning Group

Colleen Coughlin (Access Services)
Patty Falk (Special Collections)
Cliff Glaviano (Technical Services)
Stefanie Hunker, Chair (LITS, Information Services)
Mark Strang (LITS)
Ed Weiland (Science Library)