» "Because that's what Hermione does," said Ron, shrugging. "When in doubt, go to the library." -j.k. rowling, harry potter and the chamber of secrets

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Technology Planning for Libraries

» Understanding their priorities will help libraries make choices that enhance the patron experience.

BY DR. ROBERT BURGIN

Which comes first: the technology plan or the strategic plan? This question was the focus of a recent discussion on David Lee King's blog. King is the digital services director at the Topeka & Shawnee County Public Library and author of two books about using technology to "create great customer connections." He cited a speaker at the University of Toronto's "Future Tech Strategies for Libraries" symposium who argued that because technology "drives what the organization does," in many organizations, the technology plan is beginning to come first.

Arguing both sides, King pointed out that:

"On the one hand, if you have a good strategic plan that is including technology... meaning that your tech manager is with it and has helped develop those strategies...then following a good organizational strategy makes sense. That's how I've always operated. There's no need for a real technology plan, because it's embedded in the plans of the library.

On the other hand, today's technology is driving the organization in many ways. Even something as "traditional" as new computer purchases, updating an OS, or replacing a telephone system...can have a big impact on the organization's budget, planning, training, and organizational capacity for the year.

Then, when your 'new phone system' is moving from an out-of-date system to a VOIP system with such benefits as unified messaging, hands-off capabilities to a mobile device, and internal chat messaging...that can have a HUGE positive impact in how the organization does its work, and can have a big impact on the library's strategic plans."1

The four individuals who commented on King's blog post were unanimous in recommending that a library conduct a strategic plan first. One commenter noted "the importance of setting strategy first and then developing resources and projects to realize strategy" and argued that "I am even suspi-

USER OUTCOMES SHAPE LIBRARY SERVICES

Open workflows, system interoperability, and new technologies deliver choices to librarians, enabling them to achieve optimal outcomes. BY NEIL BLOCK

SPREADING THE WORD, SHARING THE LOVE

The practice and ethos of today's resource sharing community. BY TOM BRUNO

2015 SURVEY OF MOBILE TECHNOLOGIES IN LIBRARIES

The results of Strategic Library's first survey on library technologies.

cious of the idea of developing strategic and technology plans together, as I think that risks letting technology influence strategy in a limiting way."

As this individual points out, there is a clear danger in letting technology planning take precedence over strategic planning. First, doing so limits strategic planning. Instead of considering the needs of the community being served, the library is likely to consider what technologies it has to offer and to create strategies that make use of them, whether or not the technologies actually meet a pressing need in the community.

The second danger of letting technology drive the strategic planning process is that doing so could cost the library a good bit of money by having the library invest in technologies that are not, in fact, meeting community needs or that will soon be obsolete.

STRATEGIC PLANNING FIRST

One of the key principles of technology planning, then, is that such a plan comes after and is subordinate to strategic planning. The library staff determines the broad goals and objectives that the library is trying to achieve and then identifies the technologies that will help the library make progress toward those goals and objectives.

The Universal Service Administrative Company (USAC), which administers the federal e-rate program for schools and libraries makes a fairly strong statement regarding the primacy of strategic planning:

"Technology planning must not be treated as a separate exercise dealing primarily with networks and telecommunication infrastructure. Approved technology plans must establish the connections between the information technology and the professional development strategies, curriculum initiatives, and library objectives that will lead to improved education and library services."²

The excellent TechSoup for Libraries website makes a similar point by noting that a technology plan "Forces you to align your IT decisions with the library's overall strategic priorities" and "Encourages you to align your IT priorities with the needs of your community and the needs of your staff."³

The Public Library Association's Planning for Results model⁴ also shows how technology allocations should be driven by the library's mission, understanding of community needs, service responses, goals, objectives, and activities **(see Figure 1)**.

Each of the service priorities listed in the Planning for Results model includes sugges-



Figure 1: Public Library Association's Planning for Results Model (Sandra Nelson, Strategic Planning for Results. Chicago: American Library Association, 2008.)

tions for the technology resources needed to support the specific service priority. For example, for the "Create Young Readers" service priority, *Strategic Planning for Results* lists child-friendly computers as a technology needed to support that broad service area. For the "Succeed in School" service priority, *Strategic Planning for Results* lists computers that allow students to upload assignments as well as publication software and color printers for homework projects.

The recommendations in *Strategic Planning for Results* are, of course, just a beginning, and librarians should have enough familiarity with library technologies and what other libraries are doing to know what technologies can be helpful in meeting the specific goals and objectives of their libraries.

ASSESSING CURRENT TECHNOLOGY

Planning efforts, including planning to add or upgrade technologies, should begin with an assessment of the current state of the organization. Planning, after all, is a matter of understanding where the organization is and where the organization wants to be. This is especially true of technology planning, where the key question is whether the library currently has the technologies needed to support its goals and objectives.

The library's staff may wish to begin the

technology planning process by conducting various inventories, including inventories of the library's equipment, the library's services (both existing and proposed) and the technologies that support each service, and the technical skills needed by library staff. Several helpful work forms for these inventories are available in Diane Mayo's book, *Technology for Results: Developing Service-Based Plans.*⁵

Traditional tools, such as SWOT analysis (see Figure 2), may also be helpful at this stage of the planning process. In particular, an understanding of the library's strengths and weaknesses with respect to the technologies needed to support its goals and objectives should prove valuable in assessing the current situation. For example, a library planning to implement the service priority "Connect to the Online World" may have an adequate number of public access computers (a strength) but may lack wireless Internet access at all of its locations (a weakness).

The following resources are also useful when assessing a library's technologies used to provide current offerings for patrons.

Community data. The use of community data in overall strategic planning has been a growing trend in libraries for at least twenty years.⁶ But community data related

SWOT ANALYSIS



Figure 2: SWOT Analysis

to technology is more difficult to find; for example, few sources provide data about home computer and broadband Internet access on a state or county level. The best that libraries may be able to do is find proxy measures—percentages for minorities, education level, and poverty rates in the local community—to help establish the need for certain technologies.

For instance, the latest national survey on broadband Internet access by the Pew Research Center found that home broadband Internet use was lower for blacks and Hispanics, for those with no college education, and for those making less than \$50,000 per year.⁷ Communities with higher representations of these groups are likely to have lower rates of broadband Internet access at home, thereby making it more important for the library to provide this service in support of its goals and objectives. Also, libraries serving communities with less access to computers and the Internet at home will be more likely to need to provide access to child-friendly computers to support the "Create Young Readers" service priority than will libraries serving more educated or wealthier communities.

Surveying and interviewing individuals. Surveying users regarding the library's technologies is also an excellent way to assess the library's current offerings. Such surveys can ask library users what technologies they currently use as well as how satisfied they are with those technologies. As with surveys to assist with strategic planning, surveys for technology planning do not need to be elaborate to be effective, and online tools such as Survey Monkey can be used to make it easy to gather data.

Interviewing library users and stakeholders is another way to assess the library's current technologies. Stakeholders may range from local government officials, who may have opinions about the library's current technologies, to library users, especially those who are using the technologies that the library provides. Useful information can be gathered through one-on-one interviews as well as through focus groups (where participants are invited to attend) or open forums (where anyone may attend).

Stakeholders may also include local IT experts and decision makers. In fact, the first step in TechSoup's six-step technology planning tool is "Find the real IT decision makers in your community and schedule meetings with them."⁸ These experts and decision makers may include library users and non-users, local government department heads and employees, and other influential individuals.

This past year, I spoke with several users at one of my client libraries and I was quite impressed with their level of technological expertise. One of the users was able to point out several security flaws in the way the library was implementing its public access computers, and when this information was passed along to the library, the staff were able to better secure those computers.

Library data. Statistical data on the provision of library technologies is also available to help libraries assess where they stand with respect to the technologies. Much of the data are reported to state library agencies and eventually to the Institute of Museum and Library Services, which provides a tool for comparing public libraries (http:// harvester.census.gov/imls/compare/index. asp). Among the technological measures available from this source are the number of electronic books, the number of databases, the number of uses or session of public Internet computers, the number of public Internet computers, and the average number of public Internet terminals per station-

A library can use this information to compare its provision of technologies with libraries in the same state or region of the country as well as with other libraries across the United States. Library data can be a powerful indicator for local officials of where the library stands in comparison to its peers, although it is important to remember that these comparisons should be viewed within the context of the overall goals and objectives of the library.

ary outlet.

One of my recent clients found that the number of public Internet computers its libraries provided for users was far below the state average, especially in its headquarters library. Because the demand for these computers was high (the library system ranked in the top 20 per cent of the state's libraries in users of Internet computers per capita) and because several of the library's service priorities depended on public Internet computers, increasing the number of these computers became a priority for the library system.

THE EDGE INITIATIVE

Public libraries also have access to the Edge Initiative,⁹ a suite of tools that can assist with an assessment of current technologies and the ways in which those technologies are used to provide services to the public (see Figure 3).

As the Edge Initiative website points out:

"Through an easy-to-use suite of tools, Edge supports libraries in making strategic decisions and identifying areas for improvement. The Edge Toolkit provides libraries an overview of current public services and community engagement. From operations to partnerships and programming, the toolkit generates recommendations for implementing best practices to align with future growth and community priorities. It also provides useful resources to demonstrate the library's community service to community leaders."

The Edge Initiative, which was led by the Urban Libraries Council and funded by the Bill and Melinda Gates Foundation, helps libraries analyze the technology services provided to users, identify gaps in services, and create action plans to target unmet needs by scoring the library in three areas:

- Community value, which analyzes how the library provides programs and services that enable the community to get value from the use of technology. For example, the library may meet benchmarks in this area by offering inperson classes on basic computer skills or by offering access to photo editing software.
- Engaging the community, which looks at how the library involves the community to illicit feedback on technology needs and how the library uses this feedback to align its digital technolo-



Figure 3: Edge Initiative Website

gies with the needs of its community. For example, the library may meet benchmarks in this area by engaging in resource-sharing partnerships with a workforce development organization or a local health and wellness organization or by surveying patrons annually about public technology use and outcomes in workforce development or health and wellness.

- Organizational management, which examines how the library integrates public access to its technologies into its planning and policies. For example, the library may meet benchmarks in this area by having a hardware replacement plan with a three- to five-year refresh cycle or by making video conferencing equipment available for public use. Looking at technology from another perspective, a library may decide, based on the needs of its community, to emphasize career and job information as an area of focus and set goals and objectives toward that end. In that case, the appropriate benchmark of the Edge Initiative suggests that the library:
 - Select and organize online resources for job seeking, employment skill building, or professional certification.

- Offer access to online career testing preparation tools through its website or through career testing software.
- Organize or host a library class for patrons on using online job-seeking, career development and small business development resources at least quarterly.

If the library is not currently engaged in these activities, then the library might choose to implement one or more of them.

While the Edge Initiative represents an excellent resource for assessing a library's current use of the technologies, any library using it should remember the "strategy first" rule. Only those sections of the Edge assessment that relate to the specific goals and objectives of the library need to be consulted. While the scores in the Edge assessment may be helpful in providing the library with a general sense of how well it is employing various technologies, the benchmarks that address the library's goals and objectives are the most important.

EMERGING TECHNOLOGIES

Because of the rapidly changing nature of technology, it is extremely important for library staff to continually review and assess

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WHO THEY ARE, HOW THEY FIND BOOKS, THE PERFECT READ, THE IMPORTANCE OF LIBRARIES, MEN IN BOOK CLUBS, AND MORE...

» Staff can remain aware of developments in library technology by attending state and national conferences, especially the programs that highlight innovative uses of the technologies in other libraries and exhibits that showcase the latest developments by vendors.

emerging technologies as they relate to the library's goals and objectives. One of my recent clients even had an "Innovation Review Team" to explore new ideas for technology, programs, and services, and to make recommendations for their adoption and implementation by the library.

Staff can remain aware of developments in library technology by attending state and national conferences, especially the programs that highlight innovative uses of the technologies in other libraries and exhibits that showcase the latest developments by vendors. Staff can also learn from the individual librarians listed as "movers and shakers" by *Library Journal* (<u>http://</u> <u>www.libraryjournal.com/</u>); these individuals typically include several who have brought technological innovations to their libraries.

A number of other Web resources also provide information on the application of new technologies in libraries. These include:

- Blogs and Twitter feeds. (See "Five Librarian Bloggers to Follow," <u>http://</u><u>newsbreaks.infotoday.com/News-</u> <u>Breaks/Five-Librarian-Bloggers-to-</u> Follow-101614.asp.)
- Stephen Abrams's blog, "Stephen's Lighthouse," written by the former Vice President of Innovation for SirsiDynix (http://stephenslighthouse.com/).
- The Library & Information Technology Association's top technology trends, which are discussed at meetings of the American Library Association. See <u>http://www.ala.org/lita/ttt</u> for trends at the most recent annual conference.
- TechSoup for Libraries, which shares ideas on how to support the technology needs of public libraries (<u>http://</u> www.techsoupforlibraries.org/).
- Marshall Breeding's "Library Technology Guides," which provide information on integrated library systems (<u>http://</u><u>www.librarytechnology.org/</u>).

Many of these web resources are available as RSS feeds, which enable the library staff to stay informed of new postings of interest without having to repeatedly visit these websites individually. Library staff should learn to use feed readers like Feedly (http://www.feedly.com) or NewsBlur (http://www.newsblur.com/) to aggregate the RSS feeds.

Surveying and interviewing users. A good way to assess the library's current technologies and future possibilities is through surveys of and interviews with library users. These methods can be used to ask library users what technologies they would like to see the library adopt. Surveys and interviews on potential technologies can also extend to non-users, who may be able to help the library understand what technologies would be likely to encourage their use of the library.

I recently talked with an individual who worked in creative services for a large corporation in Florida. He asked me whether I thought that libraries were dying and offered his opinion that his local public library had little to offer him. However, when I mentioned makerspaces, he became excited. "If my library had a 3-D printer," he said, "I'd be there every day."

All library staff will have to decide whether a makerspace or any other technology will helps it meets its service goals and objectives, but often library users and non-users can give the library a sense of the technologies that are possible, now or in the near future.

LESSONS LEARNED

I have worked with public and academic libraries on strategic and technology planning since the mid-1980s and have, I hope, learned a number of lessons that libraries should keep in mind as they create technology plans. Three of the more important lessons are outlined here.

Be Flexible. Given technology's tendency to undergo rapid changes, it is best for the technology plan to be flexible and fairly general. For example, a recent client set a preliminary goal to provide Skype for users at all of its locations. When a community team reviewed the library's proposed goals, one member of the team pointed out that Skype might not be the best solution, especially given the five-year time frame of the technology plan. He suggested a more general goal—to provide teleconferencing at all library locations—and the staff agreed. Such a general goal allows the staff to use the most appropriate tool to meet the goal and doesn't tie the staff to one specific solution, like Skype.

Another example of this principle is the makerspace, which many libraries have been implementing or are thinking about implementing. Typically, when I mention makerspaces to librarians, they think 3-D printers. In fact, makerspaces can encompass much more. The Pikes Peak (Colorado) Library District, for example, offers sewing machines at one of its makerspaces. The Public Library of Cincinnati and Hamilton County (Ohio) provides media conversion stations at its makerspace so that users can convert cassette tapes, VCR tapes, slides, and photos to digital media. The Fayetteville (New York) Free Library offers jewelry making tools, crochet and knitting kits, and even a variety of creation-based tools and kits for children in their makerspace. The point is that libraries should focus on what a makerspace is trying to accomplish: supporting the imagination and creativity of its users rather than on the specific technologies.

Train the Staff. Too often, the emphasis in technology planning is on hardware and software. However, to ensure the proper and effective use of the technology, a firm commitment to staff development is needed. Otherwise, the benefits of the technology will not be fully realized. In particular, libraries should conduct both an organizational training needs assessment and individual training needs assessments. Acquiring or improving the specific skills identified in the survey should then be included in individual staff work plans and monitored by library administrators, who should assist staff members in finding training opportunities in the areas identified as important. Libraries should also focus on the options for providing the necessary training and on techniques to maximize the transfer of training so that the desired changes in understanding and skill level do take place.

Evaluate the Plan. Any plan to add or

» If changes in the technologies have rendered the library's goals and objectives obsolete, then staff should not hesitate to adjust the goals and objectives. Staff might take advantage of this opportunity to make its goals and objectives more flexible and general.

upgrade technologies to meet patron needs should also include an evaluation component to ensure that the anticipated improvement in service to library users has been realized. This should be done at least annually at meetings of both the staff and the library board. The easiest way to evaluate plans for library technology is to simply determine whether technology-related goals and objectives have been met. If they have not been met, then library staff should examine the obstacles to putting them into place and determine an action plan for overcoming the obstacles.

USAC argues for the importance of an ongoing evaluation of the technology plan by noting:

"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."¹⁰

If changes in the technologies have rendered the library's goals and objectives obsolete, then staff should not hesitate to adjust the goals and objectives. Staff might take advantage of this opportunity to make its goals and objectives more flexible and general.

TECHNOLOGY FOR STRATEGIC REASONS

The old joke about everything looking like a nail when you have a hammer reflects a truth about technology and its tendency to become an end unto itself. Without proper planning, librarians may invest in technologies that do not meet the important needs of the community that the library is trying to serve. Such investments may divert funds and staff time from better ways of meeting the library's goals and objectives, limit the staff's creativity in finding the best was to meet the needs of the community, and commit the library to supporting inferior solutions.

It is all too easy for libraries to acquire technologies for the wrong reasons: because "everyone is doing it" or because "it's the latest and greatest." Proper technology planning, by contrast, recognizes that technologies are simply tools for helping achieve the library's goals and objectives. Proper technology planning helps library staff better assess those technologies by gauging how well they enable the library to meet the needs of the individuals that the library serves.

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FOOTNOTES:

¹ David Lee King. "Which Comes First – Strategic Plan or Technology Plan?" Web blog post. David Lee King, 24 February 2015. URL: <u>http://www.davidleeking.</u> com/2015/02/24/which-comes-first-strategic-plan-or-technology-plan/. Accessed 10 July 2015.

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⁴ Sandra Nelson. Strategic Planning for Results. (Chicago: American Library Association, 2008).

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⁸ TechSoup for Libraries. "Six-Step Technology Planning Tool." URL: <u>https://www.techsoupforlibraries.org/cookbook-3/planning-and-decision-making/tools/six-step-technology-planning-tool</u>. Accessed 15 July 2015.

 ⁹ Edge Initiative URL: <u>http://www.li-</u> <u>braryedge.org/</u>. Accessed 22 July 2015.
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User Outcomes Shape Library Services

» Open workflows, system interoperability, and new technologies deliver choices to librarians, enabling them to achieve optimal outcomes.*



BY NEIL BLOCK

The academic library workflows are evolving. The move toward electronic content has ushered in a new era and a reassessment of the information management workflow in support of electronic content in academic libraries. The next generation library automation system—the Library Services Platform (LSP)—emerged as a way to readily support electronic resources along with print. At the same time, other requirements included the need for a cloudbased solution that is multi-tenant yet readily customizable for individual libraries, provides support for complex lending models and shared data, and is a prerequisite for thousands of system parameters across long-established system models.

The LSP certainly addresses fundamental gaps evident in the traditional integrated library system (ILS). The LSP's cloud-based architecture delivers software as a service, reducing the need for local hardware and providing maintenance efficiencies, including streamlined software delivery and functionality enhancements for all subscribing institutions. The LSP also seeks to accommodate the management of a variety of content types within a single environment. Yet, the focus on integrated back-end workflows and (e)-content management may obscure the needs of the library end user. In other words, the LSP may not sufficiently address end-user outcomes for a better experience and improved discoverability of content.

DISCOVERY AND THE END USER

Discovery as a genre made its appearance alongside the LSP. In effect, discovery mirrored a wider technology trend of improving the online experience of end users. A new approach was warranted, where ease of navigation and quick access to resources was central. Moreover, Google had set the standard for "search." A single search box that provides immediate access to all resources became the norm.

As a result, discovery took on different meanings in the library industry. Origi-

nally, discovery implied merely the library's web presence, basically a next-generation library catalog. Now, discovery has gone beyond the presentation layer to include a central index of both print and electronic resources. Its features include highly sophisticated technology for relevance ranking, discipline-specific research, and UI customization.

This newer version of discovery has not only become the arena where the end user experience stands or falls, but also the essence of library success. Discovery, after all, is the solution that drives the usage of the entire library collection — print or electronic. Discovery directly ties to successful user interaction with the library as a whole.

In this context, discovery is the key technological asset that supports the library's mission. Assuming that centrality of the discovery service, there is much to consider: the inclusions of all content types, the technological approach to search and relevance ranking, the interoperability of the solution with third-party applications, and, most importantly, its ability to streamline workflows from content selection to discoverability and fulfillment.

DISCOVERY CONSIDERATIONS

The era of print dominance has steadily given way to a new content paradigm characterized by an increasing prevalence of electronic content. As a result, journals in electronic format and e-books must be wholly represented in a discovery service. They must be available in different business models, and supported through standardsbased, open technologies to ensure flexibility in access and fulfillment.

The business models that govern access to electronic content are fundamental to delivering more choice to libraries and patrons alike. E-books are a good example. Libraries today have options to procure e-book through different models: one book/ one user, multi-user, unlimited simultaneous use, and subscription, for example. Regardless of the acquisition model, tight integration between software applications is desired. When an e-book is procured, the LSP should be updated and the e-book made available for immediate discovery by users in as few steps as possible.

Beyond these business approaches, technology naturally underlies content accessibility. While seemingly straightforward on the surface, a tremendous amount of complex technology behind the scenes supports the user interaction.

Another critical aspect is the accuracy of relevance ranking and search algorithms that must surface the most relevant results for every query. The user query, often one or two words, must search across all content types and potentially billions of records and deliver the best results to the top of the screen.

Divergent approaches to this task can be seen in discovery services with varying emphasis on either keyword in title and full text, or subject and abstracts. In addition, the ability of a discovery service to leverage subject headings across different databases often determines not only the scope but also the accuracy of a search within specific disciplines.

Still, the quality of search results is just one determinant in the overall end-user experience. Other aspects include the linking to full text, user interface customization, and integration with other applications within the library. Discovery, after all, resides within a complex technology ecosystem where application must work together to ensure successful end-user outcomes.

When applications are open and interoperable, libraries have the choice to select systems that support workflow efficiencies and end-user services that meet their institution's strategic objectives. Naturally, there are certain business and technology underpinnings that must be embraced for interoperability and choice to become the norm across the entire library workflow. When done right, however, libraries can choose those workflow components that are "best of breed" in support of end-user outcomes.

OPEN WORKFLOWS

As libraries work with multiple content

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The 2015 Survey of Mobile Technologies in Libraries illustrates how librarians use and intend to use mobile technologies in their libraries and what patrons want their libraries to provide today and in the future. Its charts and tables graphically present a range of data by library type (Academic, Public, and K-12 School) and geographic region.

The survey data can be used by library professionals and administrators as benchmarks for planning and budgeting purposes. The data can also help answer the following questions:

- What features are common on library mobile websites?
- How do libraries deliver mobile access to patrons?
- What to libraries plan to change in their mobile offerings to patrons?
- How satisfied are patrons with their library's mobile capabilities?

Publication date: August 10, 2015 Price: \$69 Format: PDF

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providers and software vendors, interoperability becomes imperative for libraries to access and choose those applications that best serve their users. The overall information management lifecycle, in fact, comprises multiple, interrelated areas where choice and interoperability ultimately drive user success. From content selection and procurement, to funds and holdings management, to discovery and fulfillment, to collection analysis—each workflow can be optimized to deliver desired efficiencies and outcomes.

Starting with content selection and procurement, libraries should have the ability to choose ordering platforms and content sources. Libraries must also be able to select the resource management platform and knowledgebase of choice to readily manage holdings for both print and electronic resources. And libraries must be able to choose an LSP for resource management that allows optimal discoverability of content via the library's discovery service of choice.

A February 2015 NISO white paper reiterated as much, noting, "Many libraries need the ability to set discovery and management strategies independently and expect these systems to have mutual interoperability."**

Naturally, optimizing workflow through choice has its challenges. First, competing software and content vendors must recognize the business benefits of interoperability. By supporting openness, vendors can focus on core strengths and deliver better solutions to customers. At the same time, the range of application within a library's technology ecosystem requires a strict adherence to standards.

Applications must be interoperable through standards-based application programming interfaces (APIs) and web services that support openness across a spectrum of content and platforms.

Through the principles of openness, libraries have real choice. Open means evaluating and choosing technology on its own merits; the ordering platform, the link resolver, the LSP, and the discovery service. Each of these applications should be assessed independently for its compliance with open standards and its affect on the library's mission and the end-user experience.

AN OPEN END-TO-END PLATFORM

When looking at the library workflow from the perspective of end-user outcomes, a new open "discovery services platform" takes shape. This model, where the user is center stage, seeks to optimize workflows for content procurement, user and resource management to the benefit of content discoverability, collection usage, and the end-user experience with the library. Existing technologies such as APIs and web services provide for choices across a range of applications with the library's technology ecosystem. In other words, the library can select those solutions and content sources that best shape its mission and its success.

With its focus on outcomes (better user experience and increased collection usage), the discovery services platform shifts attention away from traditional back-end processes. With digital as its core, the information management life-cycle has changed to reflect a rich array of content types and formats. An open technology and content stack allows libraries to source and procure content though different platforms and from different providers. In a discovery services platform, content flows directly to discovery, supported by the LPS's resource management and user functions as needed along the way.

Print records must be enhance with holdings information, for example, and presented within the discovery services. Likewise, user activities (the ability to place holds and renew items, for example) are readily enabled within the front-end discovery service of the library's choosing. In short, the LSP feeds important data for specific content types and certain user functions through the value chain in support of content discoverability and usage.

The concept of open in support of enduser outcomes requires a commitment within the software vendor community to the principles of interoperability. The community at large—vendors and libraries alike—stand to benefit from more choice. Much as already been done, yet more is needed. As partnerships among all players evolved and strengthen, an open discovery services platform in support of end-user outcome becomes the new norm. For software vendors, this new norm means supporting and optimizing whatever decision libraries make for technology and content alike.

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**Breeding, Marshall. "The Future of Library Resources Discovery," White paper commissioned by the NISO Discovery to Delivery (D2D) *Topic Committee*, February 2015. Online PDF File: <u>http://www.niso.org/</u> <u>apps/group_public/download.php/14487/</u> <u>future_library_discovery.pdf</u> (Assessed on April 27, 2015).

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Spreading the Word, Sharing the Love

» The practice and ethos of today's resource sharing community.*

BY TOM BRUNO

Despite its growing importance to access services and collection development, interlibrary loan (also known as ILL or resource sharing) is still rarely taught as a subject in library school. As a result, practitioners often "fall into" the job and must learn the business of ILL from their colleagues or on their own—a daunting prospect for a such an outwardly-facing discipline with technological and legal components that are in a constant state of development.

Two successful attempts have been made to address this skills/knowledge gap with peer-based instruction: the ALA RUSA STARS Rethinking Resource Sharing STAR Checklist and the IDS Project's Online Learning Institute.

"Increasingly I see ILL as transcending format. We exchange skillsets in addition to data. Backroom shop is everywhere." Angela Galvan, Ohio State University

THE RESOURCE SHARING COMMUNITY

My own path to the discipline of resource sharing was almost as complicated as my career path as a librarian itself. Having secured temporary employment at a large university medical library immediately following college graduation, I found myself working in the Interlibrary Loan and Document Delivery office, where I learned the fundamentals of resource sharing from my colleagues, all of whom had been on the job for at least ten to fifteen years, if not longer (in fact, one of the employees had grown up in the neighborhood where the library was built, and her job was the only position she had ever held). Although by virtue of our regional library consortium we had access to training on the basics of processing interlibrary loan requests, the majority of what I learned came from my coworkers.

Indeed, when I decided to pursue my Master's degree in library science (in 2004 to 2005), I couldn't help but notice that none of the classes I took addressed topics in resource sharing, nor did any of my instructors—even those adjuncts who were currently practicing in the field as library professionals—mention interlibrary loan except in passing as a means to obtain material that our school library could not provide.

As someone who had worked primarily in ILL before attending library school, the omission perhaps seemed more profound to me than it would have otherwise. But I have confirmed with my peers in the field that many of them had a similar experience when getting their own library science degrees.

As luck would have it, my first professional position was as Head of Resource Sharing based on my previous experience having worked in an ILL "shop." This was another lesson I learned anecdotally from conversations with my peers: that resource sharing was still considered such an esoteric library discipline that any working experience tended to give one an inside track to employment in the field. Once I had settled into the position, however, I realized that, unlike in my first job as a library assistant where I could rely on the skills, knowledge, and experience of my colleagues to help onboard me, there was a good deal that I didn't know about managing an ILL shop that I would have to figure out on my own.

This is where I discovered the value of the resource sharing community first and foremost as a community of best practices. As the business of interlibrary loan is based on the collaboration and cooperation between libraries and library systems, the resource sharing community has a vested interest in ensuring that its constituent members are making ILL requests from one another correctly and in good faith.

To this end, a rather vibrant ecosystem of information sharing has evolved to assist in the virtual onboarding of new practitioners:

apart from regional and state resource sharing organizations, ILL heads can seek advice from several different email listservs (including ILL-L and Workflowtoolkit-L), Facebook groups (such as ILLers and a FB Group For Interlibrary Loan Librarians), and even Twitter. I have no

doubt that it's only a matter of time before ILL librarians take to other social media platforms, such as Snapchat, Reddit, or whatever is coming next.

The resource sharing community also has a strong national presence in the American Library Association through its Sharing and Transforming Access to Resources Section (STARS), a section of the Reference and User Services Association (RUSA). RUSA STARS offers regular education and outreach to the resource sharing community, including a very popular and successful ongoing Midwinter pre-conference workshop called "Everything You Wanted to Know About ILL, But Were Afraid to Ask." The conference is taught by a team of veteran ILL practitioners and addresses the basics of ILL Borrowing, Lending, and Copyright, as well as standards and resources.

Even Atlas Systems, the vendor of the pre-eminent ILL request processing management system (ILLiad), actively fosters this sense of community by sponsoring an annual conference in Virginia Beach. Librarians and library staff are invited to share their best practices, experiences, and significant accomplishments, which have resulted in better and more efficient resource sharing workflows.

"We value all research whether the library anticipated the need or not. We value all researchers whether they conduct their research at our institution or at another. We value change and embrace the global nature of research. We value efficiency through continual process improvement. We value effectiveness by making our services available when and where the user is. We value community because without it we would accomplish nothing." Collette Mak, University of Notre Dame

FROM MANIFESTO TO CHECKLIST

An *ad hoc* group was formed in 2005 connected to ALA RUSA STARS through the Rethinking Resource Sharing Policies Committee. The Rethinking Resource Sharing Initiative (RRSI) was conceived of as a think tank of interlibrary loan and document delivery experts to help define and promote best practices in the resource sharing community. Its mission is "to foster an updated framework of cooperation and collaboration," encouraging libraries not just to find new ways to serve their own patrons, but all potential library users.

In the process of furthering this mission, RRSI has come up with several different mechanisms for helping communicate best practices and encourage ILL shops to rethink their core processes. Together, they form the RRSI Manifesto, a short but powerful set of aspirational goals towards which all resource sharing units should strive;

- The STAR Checklist, an actionable document containing more than 100 benchmarks against which libraries can compare their current workflows and practices;
- The Innovation Award, which recognizes an individual, library, or group for work that has advanced the cause of rethinking resource sharing; and
- #RRSChat, a social media outreach campaign for ILL practitioners on Twitter, which promotes discussion around a variety of topics of interest to the national and international resource

sharing community. This group will be starting its third series of Fall Twitter chats in September. Dates and times to be announce on the Rethinking Resource Sharing Initiative website: http://rethinkingresourcesharing.org/.

The RRSI Manifesto was conceived as a challenge to the static or restrictive policies concerning resource sharing found at many libraries, especially those serving colleges and universities. Conventional wisdom had historically regarded interlibrary loan as a kind of afterthought to existing library services, or even an admission of failure on the part of the library to provide for their users' research needs. In addition, when responding to interlibrary loan requests from other institutions, many college and university libraries prioritized the needs of their own patrons over those of the requesting patrons from elsewhere, thereby formulating their resource sharing policies to reflect this valuation.

Some libraries were (and still are) notorious for requiring large ILL lending fees, or for asking borrowing libraries to grant them additional time to respond to requests. Still others ask only to receive requests as a lending library of last resort, if no other potential lenders are available.

The resource sharing ecosystem, however, depends on a critical mass of libraries willing to lend their materials. While it may seem a cliché to say that "you have to give in order to get," this platitude is particularly applicable to the business of interlibrary loan.

In my writing and presentations, I have spoken at length about the "Circle of Resource Sharing Karma," which powers and underwrites our collective endeavor. I don't think I'm saying anything particularly revolutionary by stating that library administrations, especially those at large academic research libraries, are not particularly known for their risk-taking. This makes the peer group of critical importance to securing buy-in for expanding or enhancing one's own resource sharing operation locally. If an ILL head can point to a peer institution that has successfully opened up lending their audiovisual materials without any ill effects, for example, then that increases the chances of that other ILL heads can sell such a policy change within their own administration.

In this regard, the RRSI Manifesto is meant to foster a discussion among peers. It

is a small but provocative list of declarative statements that, although no one library may fully espouse, is intended nevertheless to resonate on at least some points with respect to one's own institutional goals (see Sidebar).

Operating hand in hand with the RRSI Manifesto is the STAR Checklist, an aggressive collection of more than 100 service and operational benchmarks whose stated purpose is "to challenge library decision-makers to live on the front lines of rethinking resource sharing." There is no expectation that a single library will meet every item in the list. While aggressive, the RRSI also recognizes that achieving STAR status should be attainable." (See <u>http://rethinkingresourcesharing.org/wp-content/uploads/2014/03/</u> <u>RRS-Star-submission-form-with-questionsfor-WEBSITE.pdf</u>)

Libraries are encouraged to print the checklist and measure their own operations against it point for point, scoring themselves as directed for each individual item or benchmark on the checklist. Some sample questions from the STAR Checklist include the following:

- Library generally responds to and updates lending and borrowing transactions within 24 hours.
- Library has enabled automated request features in its catalog or discovery tool.
 For example, OCLC's Direct Request links within a national or union catalog, such as LoansomeDoc.
- Library digitizes items that cannot be loaned physically within the confines of copyright and other legal restrictions. For example, when appropriate, scanning aged print documents to loan digitally.
- Library accepts credit cards for payment of transaction fees.

For scoring purposes, each STAR Checklist item has three possible answers:

- 1. We do this now,
- 2. We plan to do this in the next 12 months, and
- 3. We do not do this.

Once a library completes and scores their self-assessment, they may send their completed STAR Checklist to the Rethinking Resource Sharing Initiative for official grading. Libraries may receive up to four "stars," depending on how open and user-focused their resource sharing operations are. Libraries are encouraged to regularly re-assess

The RRSI Manifesto

- Restrictions shall only be imposed as necessary by individual institutions.
- Library users shall be given appropriate options.
- Global access to sharable resources shall be encouraged.
- Sharable resources shall include those held in cultural institutions of all sorts.
- Reference services are a vital component.
- Libraries should offer service at a fair price.
- Library registration should be as easy as signing up for commercial web-based services.

their operations and submit their new results as a form of official recognition of having taken the required steps to improve their own workflows.

By providing not only an independent voice challenging the orthodoxy of static or outmoded library services, but also an external and objective means of assessing one library's operations against their resource sharing peers, the Rethinking Resource Sharing Initiative has established itself as a virtuous gadfly in the ILL shop, prodding resource sharing practitioners to ask tough questions about who, how, and why they serve through an engaging collective framework that gains more power through sharing it with one's peers.

They say "Knowledge is Power" but "Sharing (Knowledge)" is the act that gives knowledge the power. Seangill Peter Bae, Princeton University.

REDEFINING COMMUNITY

Not too long ago, the International Document Services (IDS) Project was something that you only knew about if you were following the right circles. Now, the success of its products such as The Getting It System Toolkit (GIST) and IDS Logic, the IDS Project is rightfully acknowledged as operating on the cutting edge of resource sharing theory and practice.



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For more information www.mk-solutions.com or (860) 760-0438 The IDS Project was founded in 2004 as a response to the unique fiscal, logistical, and technical challenges of maintaining resource sharing in New York State following wave after wave of devastating budget cuts. Its goal is to establish "a unified community of trust and support built around a critical and clearly understood purpose: effective resource sharing." Now, more than 70 public, private, and special libraries have joined together in the IDS Project.

While many other library consortia operate on a similar ethos of sharing library resources as efficiently as possible, what makes the IDS Project a radical proposition is its approach to community. This collective spirit doesn't simply apply to the sharing of library materials, but also to the sharing of other library resources as well—such as training, technological expertise, and development—with an emphasis on support and collaboration.

Member libraries to the IDS Project contribute either funds or full-time equivalents towards the IDS Project Mentor Program, which assigns volunteers and systems specialists from current member libraries to each new member. Mentors help the staff at the joining library to configure ILLiad, optimize their workflows, and implement the technical requirements of the IDS Project, building personal relationships that form the foundation of a strong community.

Leveraging this decade of training expertise, in January 2014 the IDS Project launched the Online Learning Institute, a free series of courses about various topics in interlibrary loan taught by practitioners not just from within the IDS Project member libraries but also other experts in the field of resource sharing. Each course includes instructional videos, resource materials, discussion opportunities, and web conferences to enhance access to professionals in the field of resource sharing. Successful completion of courses provides students with Accomplishment Certificates as well as a network of colleagues to encourage discussion, troubleshooting, and innovation throughout the field.

The pilot class, Resource Sharing 101, was offered as a team-taught online course in November 2014. The success of this eightweek pilot class lead to the development of a full twelve-week program, consisting of three four-week classes: Lending 101, Borrowing 101, and Copyright 101.

Launched in February 2015, all three classes filled to capacity during the first week of registration. A second sequence was offered during summer of 2015, and plans are in the works to add additional advanced topics to the Fall 2015 sequence of courses. ILL practitioners interested in course offerings from the IDS Online Learning Institute can find more information at the following URL: http://www.idsproject.org/OLI/index.aspx.

"My Library is Your Library, Your Library Is My Library. My Fate is in Your Hands, Your Fate is in My Hands!" The IDS Project Motto

SHARING FOR THE FUTURE

This sampling of the collective ingenuity at work in the resource sharing community addresses the need to onboard ILL librarians and library staff as efficiently and effectively as possible for the good of the resource sharing business as a whole. If library schools still haven't quite gotten around to treating ILL as a topic meriting its own curriculum (alas, informal polls of recent graduates who currently work in resource sharing haven't been terribly encouraging in this regard), it is clear from the examples I have chosen to highlight that the spirit of peer-based learning among ILL practitioners is alive and well.

Of all the resources we choose to share with one another, however, it is perhaps our knowledge that pays the greatest of karmic dividends.

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AUTHOR'S NOTE: The genesis of this article was a presentation by the same title which I delivered at the 2015 ACRL Virtual Conference. Special thanks to Beth Posner, head of library resource sharing at the Graduate Center, CUNY, who was the co-author of that virtual webcast.

2015 Survey of Mobile Technologies In Libraries

» The results of Strategic Library's first survey on library technologies.

The 2015 Survey of Mobile Technologies in Libraries illustrates how librarians use and intend to use mobile technologies in their libraries and what patrons want their libraries to provide today and in the future. Its charts and tables graphically present a range of data by library type (Academic, Public, and K-12 School) and geographic region.

The survey data can be used by library professionals and administrators as benchmarks for planning and budgeting purposes. The data can also help answer the following questions:

- What features are common on library mobile websites?
- How do libraries deliver mobile access to patrons?
- What to libraries plan to change in their mobile offerings to patrons?
- How satisfied are patrons with their library's mobile capabilities?

SCOPE AND METHODOLOGY

Strategic Library is published by Library-Works, Inc. LibraryWorks helps administrators to make informed decisions about library technology, automation and software, collection development and management, facilities and furnishings, staffing, purchasing, and other areas that drive effective strategic planning and day-to-day operations. Its family of resources can enable libraries to indentify best practices, monitor trends, evaluate new products and services, apply for grants and funding, post or find a job, and even enjoy some library humor. Publications include "Books, Bytes, and Beyond," a roundup of new and featured print and nonprint releases for libraries; "Library Product News," a showcase of new and innovative products for libraries; "Library Bid & RFP Alert," a bid information service; market research reports; and other resources to help libraries do more, better, with less, including www.LlbraryWorks.com, a knowledgebase for library professionals.

The 2015 Survey of Mobile Technologies in Libraries was created in response to a



Q3 Does your library have a mobile-friendly



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demand for data on mobile technology that surfaced through the many avenues that Library Works uses to explore the current and future needs of libraries.

As an answer to this demand, *Strategic Library* conducted an online survey of 5,000 Academic, Public, and K-12 School librarians. Participants were selected using a computerized random generator, which built the sample from the Library Works subscriber database of more than 80,000 library decision makers.

The survey was conducted using a secure online form; 354 individuals responded, a 14 percent response rate. The survey questionnaire was distributed via e-mail on July 1, 2015 and closed on July 22, 2015.

ORGANIZATION OF SURVEY DATA

The charts and graphs presented are based on nationwide results from the three types of libraries: Academic, Public, and K-12 School. The results included here reflect aggregate findings, which can also be accessed through <u>http://www.libraryspot.net/SL/</u>

SL Mobile-Survey Aggregate.pdf.

A breakout of participation from each of the library types included in the survey follows.

- Academic Libraries (2- and 4-year institutions): 29.87%
- Public Libraries (central/main library, branches, consortium/district/regional system): 62.58 %
- K-12 School Libraries (elementary, middle, and high school): 8.55%

SURVEY REGIONS

Northeast: Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island, New York, Pennsylvania, New Jersey Midatlantic: Delaware, Maryland, Virginia, Kentucky, West Virginia

Southeast: Tennessee, North Carolina, Mississippi, Alabama, Georgia, South Carolina, Florida

South Central: Oklahoma, Arkansas, Louisiana

Midwest: North Dakota, South Dakota, Nebraska, Kansas, Minnesota, Iowa, Missouri, Wisconsin, Illinois, Michigan, Indiana, Ohio Southwest: Arizona, New Mexico, Texas West: California, Oregon, Washington Northwest: Montana, Idaho, Wyoming, Nevada, Utah, Colorado

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manage patron access to your library wireless network?

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Question 11: Please rate staff satisfaction with your library's mobile capabilities?

EXECUTIVE SUMMARY

The results of this survey provide important information that can be used by Public, Academic, and K-12 School library administrators to fine tune the wireless capabilities in their libraries and make strategic decisions for the future based on responses from their peers. This summary provides glimpses into how the results compare among the three groups and where plans for improvements can be targeted.

Demographics: The random survey sample selected approximately two thirds of the libraries from the public sector, slightly less than one third from Academic libraries, and the remainder from K-12 School libraries. All eight geographic regions are represented in results for the aggregate as well as the individual library types.

In the aggregate, about one fourth of the libraries were from the Midwest and Northeast regions, which is similar to the regional brake-outs for Public and K-12 School libraries. Conversely, one fourth of the Academic libraries in the survey are from the Southeast (25%), the largest region, with another one fifth from the Midwest (21%).

Usage: The questions on website usage revealed some stark differences among the three types of libraries. In the aggregate, 75 percent of all respondents have a mobile-friendly website. But the numbers are more extreme for Academic libraries (88%) and K-12 School libraries (67%).

Website features also vary greatly by library type. In the aggregate, of the 21 possible choices, all libraries responded that their website includes the ability to search the library catalog, obtain library information, access databases, download audio-books or e-books, and manage patron accounts. Most Public library websites also provide patron notifications and access to social media, while most K-12 School libraries do not allow patrons to download mobile apps. In the Academic setting, most library websites offer the ability to chat with a librarian, but very few include book reviews or homework help.

In their comments on website features, respondents mention including a section for soliciting comments; accessing "deciQ5 What features do you plan to offer on your mobile website within the next 12 months? Please check all that apply



sion tools," research, and video tutorials; and archiving local history. A small number mention that their site is under development or not up and running.

Looking to the future, libraries in general intent to focus on their core website features: library information, e-book or audio-book downloads, access to databases, catalog searches. These features are especially strong for the future of K-12 School libraries, according to their responses. In their comments, many have no plans for any changes or are unsure any will happen in the next twelve months.

Q6 How do you promote your mobile website to patrons? Please check all that apply

Q10 Please rate patron satisfaction with your library's mobile capabilities

Q11 Please rate staff satisfaction with your library's mobile capabilities

Two exceptions are notable. More than one fourth of the Academic library respondents intend to add social media and online learning features to their websites. And nearly one third of the answers from Public libraries indicate they will put their future focus on allowing patrons to register for a program or class through their website.

The vast majority of all libraries (92%) promote their mobile capabilities on their library's website. Almost all also offer wireless Internet access (97%), and only a few Public libraries charge patrons for its use.

As for the vendor libraries use to manage patron access to their wireless network, in the aggregate, Envisionware and ITC Systems/GoPrint each capture one third of the responses. Those figures are deceptive, however. For both Academic libraries and K-12 School libraries, ITC Systems/GoPrint is used in two-thirds of those libraries. Conversely, Envisionware is used in nearly one half of the public libraries, according to those respondents.

When commenting on their answers, respondents mention a host of other vendors not included among the choices. Many respondents say their wireless network is managed by an in-house IT department or a local cable company, or is an open access system.

Satisfaction: On commenting on how satisfied patrons are with their library's mobile capabilities, nearly two thirds of all libraries say their patrons are satisfied or very satisfied with their library's mobile capabilities. Interestingly, at least one fourth of all respondents are not sure how their patrons feel about their mobile capabilities. That percentage jumps higher for Academic libraries (31%) and K-12 School libraries (35%).

Staff satisfaction scores are even higher for combined satisfied and very satisfied responses. The low score is for K-12 School libraries (72%) and the high score is Public libraries (80%). The highest percentage of staff that is unsatisfied with their library's mobile capabilities work in K-12 School libraries (29%).

The full text of 2015 Survey of Mobile Technologies in Libraries is available as a download from LibraryWorks for \$69. (see the ad on page 8 for details.) The complete report breaks out survey data by geographic region and by type of library.

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