

**Winnefox Library System  
Technology Plan  
July, 1, 2009—June 30, 2013**

**A. Mission Statement**

The mission of the Winnefox Library System is to strengthen library services and to improve the availability of resources for all residents of the system area. Winnefox does this by providing support services to member libraries, promoting cooperative activities among all types of libraries, and by offering educational opportunities and consulting services. The services help to improve the knowledge and skills of librarians and trustees and increase public awareness of library services and programs.

**B. Technology Plan Mission Statement**

The Winnefox Library System will make use of technologies that will enable the system to serve members more effectively and efficiently. The system will actively assist member libraries in exploring and utilizing technology that will enable them to fulfill their unique missions in their communities.

**C. The Planning Environment**

This plan is intended to:

1. Meet the statutory requirements of Wisconsin Statute 43.24(2) that the system undergo planning with *The Division for Libraries, Technology and Community Learning* (DLTCL) and member libraries in regard to library technology and resource sharing
2. Satisfy the requirements of both the Federal E-Rate program and the state TEACH program
3. Provide a blueprint for the continuing evolution of the use of technology in services provided by the Winnefox Library System and its member libraries

All of the affected parties participated in the development of this plan. Information used in the drafting of this plan was obtained in the following ways:

1. The five county Library Advisory committees discussed library technology needs and issues at their regularly scheduled meetings.
2. The Winnefox Technology Executive Council (WTEC) and Winnefox Automated Library Services (WALS) discussed technology needs and issues.

3. Library directors reviewed the proposed activities of this plan and had input into setting priorities.
4. Member library staff received draft copies of this plan for review and comment.
5. The Winnefox Library System board of trustees discussed and approved this plan.

Wisconsin Statute requires public library systems to submit a written plan for library technology and resource sharing every five years (Wis. Stat. 43.24(2)(m)). This plan was written to accommodate the timing of this requirement. However, the planners realize that library and information technology exists in a fluid, rapidly changing environment. A particular technology that may be important in year five of a planning cycle may not be evident in year one. For this reason, this plan will be reviewed and updated each year as part of the annual budgeting/planning process. Information regarding new technologies as well as data from the evaluation process will be used to revise the plan.

#### **D. Description of Services**

The Winnefox Library System is a federated library system established under Chapter 43 of the Wisconsin Statutes. It provides services to 30 public libraries in Fond du Lac, Green Lake, Marquette, Waushara, and Winnebago counties. Technology plays a major role in many of the services provided by Winnefox. The Winnefox services listed below are ongoing throughout the life of this plan.

1. Winnefox Automated Library Services (WALS) operates a SirsiDynix integrated library system using the company's Symphony software. All of the Winnefox libraries use the shared automation system.
2. WALS supports a sophisticated server infrastructure for the 600+ PCs and 300+ users on the network. Libraries access the shared system using a high-speed telecommunications network managed by WALS. Much of the telecommunications network uses BadgerNet, the state's telecommunication network.
3. Winnefox provides Internet access to all of its member libraries, including public Internet access, both wired and wireless.
4. Winnefox provides email accounts and service to staff at all member libraries. Outlook and Outlook Web Access are provided and supported. All of the Winnefox libraries use these mail accounts.
5. Winnefox provides support for Pharos software for access and timed use of public Internet PCs. Winnefox also provides statistics on use. Eleven member libraries pay Pharos maintenance charges for this service.

6. Winnefox Cooperative Technical Services (WCTS) offers libraries cooperative materials selection, purchasing, barcoding and database record creation, processing, and professional consulting. The 19 libraries in Green Lake, Marquette, and Waushara counties use all of the WCTS services, paid for with county funds. Several libraries in the other Winnefox counties use some of the services with local funds. Winnefox has developed an online materials-selection process to streamline the acquisitions of materials.
7. Winnefox provides physical delivery of materials at least three times a week to each member library. Larger libraries, with greater volume generated by participation in WALs, receive four or five-day delivery. Materials are shared between libraries when customers use the shared online catalog to place holds on titles. Winnefox owns and operates two vans.
8. Winnefox offers printing and graphic services for all member libraries. Materials designed and printed include newsletters, bookmarks, stationery, brochures, summer reading program support, and more. Some libraries design their own material, with Winnefox doing the printing. Materials are produced utilizing desktop publishing software. All of the Winnefox libraries use the printing and graphics services.
9. Winnefox provides interlibrary loan (ILL) services that utilize both Winnefox-designed web ILL forms and OCLC ILL software to transmit requests from member libraries to the Winnefox ILL office/clearing house. OCLC ILL software is used to transmit and receive requests to non-Winnefox libraries. All of the libraries participate in interlibrary loan.
10. WCTS administers member-supported rotating collections of large print books, DVDs, and audio books that libraries may optionally use. Winnefox also purchases Playaway units for rotation. Winnefox provides a rotating collection of professional journals for library staff. Winnefox offers assistance with starting new collections of audio-visual materials. XX libraries participate in one or more of the rotating collections.
11. Winnefox licenses electronic databases in addition to those available through the state's BadgerLink program. Winnefox offers database trials, does pricing, and provides remote authentication, and statistics on use. Winnefox also offers training and support. All of the libraries have access to the system-purchased resources through their websites. Some member libraries license additional databases.
12. Winnefox has created and supports an electronic resources page for most of the library websites. The resource page groups the licensed databases, BadgerLink resources, and selected websites. Winnefox provides library users with email support for electronic resources.

13. Winnefox provides a collection of electronic books, downloadable audio, and downloadable video. These materials are purchased cooperatively via a Winnefox membership in the Wisconsin Public Library Consortium (WPLC). Records for these materials are included in the WALC catalog.
14. Winnefox provides support and hosting for member library websites. All of the Winnefox libraries have a full-featured website. Winnefox support includes consulting, design, training, and maintenance. Some libraries do most of their own web site work; some libraries have Winnefox do all of the work. Winnefox handles the domain name registration for all of its member libraries.
15. Winnefox has developed local databases for library indexing of vital records and other information from local newspapers. Seven libraries currently index vital record information, covering four of the five Winnefox counties. The indexing is available via the library websites of 24 Winnefox libraries.
16. Winnefox offers support and indexing for the digitization of local material. Two libraries have digitized local content for inclusion on their web site. Several others are participating in digitization projects. Winnefox has coordinated LSTA applications for projects.
17. Winnefox offers a variety of training and workshops for continuing education. Winnefox is exploring and testing the use online conferencing. Winnefox collaborates with other public library systems in offering workshop opportunities. Most of the events provide CE credits for certification.
18. Winnefox offers technical support in the configuration, purchase, setup, maintenance, and problem solving for a variety of equipment, including PCs, barcode scanners, printers, document scanners, and projection equipment. All of the Winnefox libraries participate in this service.
19. Winnefox provides and supports 24/7 online reference via email and chat using QuestionPoint/AskAway. This includes a link within the online catalog to assist catalog users. Winnefox pays for this service for all member libraries.
20. WALC provides support for self-check stations used at several of the larger libraries.
21. Winnefox provides a publicly-available extranet that contains information to support libraries with basic information about system services, forms, links to other useful sites, etc.
22. Winnefox provides a computer lab with projection equipment. This equipment may be booked by libraries for training or workshops.

23. Winnefox provides gaming equipment, multi-player games, and a projection unit. This equipment may be booked by libraries for programming for the public.
24. Winnefox, WALs and WCTS offer centralized purchasing of supplies and materials.
25. Winnefox has licensed survey software and can support libraries in designing and doing online community surveys.
26. Winnefox supports an annual summer reading program with planning, printed materials, and coordination for booking performers. All of the libraries participate in at least parts of this service.
27. Winnefox applies for appropriate grant funds and provides consulting to member libraries in writing their own grants.
28. Winnefox provides consulting to member libraries in library operations, hiring, personnel matters, legal matters, board issues, building projects, public relations, etc.
29. Winnefox writes, prints, and distributes several publications. One is for library board trustees, five are for the public—one for each Winnefox county.
30. Winnefox offers, via the Oshkosh Public Library, the system resource library, additional consulting, such as children’s services, special needs services, readers advisory, genealogy assistance, etc.

## **E. Issues**

Member library directors identified the following selected list of issues as important considerations in developing new services:

1. A need to define and balance needs for traditional and new services
2. A need to understand and help mold public expectations
3. A need to educate local governments about the importance of library services, funding and the role of local libraries in preserving local culture.
4. The difficulty of recruiting and training staff with sufficient computer literacy and the need for ongoing training in the use of new technologies
5. The difficulty of providing staff to assist the public in using electronic resources

6. A need to define the role of the library in helping the public with personal technology equipment
7. A need to assess the longevity of individual electronic formats before they are introduced into collections
8. A need for the introduction of appropriate new technologies
9. A need for continuous discussion of legal/ethical issues related to the use of electronic information and the protection of patron privacy
10. A need to understand the role of technology in expanding services, including services to special-needs populations

#### **F. Goals and Activities for 2009—2013**

The universe of potential new services is larger than the need and capability of Winnefox and its member libraries to develop new services. All potential services will be evaluated according to the following factors before Winnefox commits significant resources to their development:

1. Have a significant number of member libraries identified a particular technology (or practice which uses a particular technology) as one that would enable them to provide improved service to their communities?
2. Has a technology achieved—or is it likely to achieve—sufficient consumer market penetration that customers will expect to utilize or access it in their local public library?
3. Are there opportunities for Winnefox to partner with member libraries and/or other organizations in the development of this service?
4. Will the development and maintenance of this service replace, complement, or detract from other Winnefox and/or member library services?
5. What is the potential for funding a new service, either through new revenue, member library contribution, or discontinuing another Winnefox service?
6. Can another organization more effectively meet the suggested new service?
7. Can a new technology be explored and tested at a reasonable cost, both financial and in personnel?

Winnefox member libraries may also directly develop functions or service programs that may or may not be on the list of prioritized Winnefox services.

### ***Strategic Goals:***

1. Winnefox will strive for innovation and excellence in the adoption of appropriate technology to improve service to Winnefox member libraries.
2. Winnefox will assist member libraries in acquiring and implementing innovative technologies to meet the needs of their unique communities.
3. Funding and intelligent use of tax dollars is a major concern of libraries as it is of all public-service providers. Winnefox will assist member libraries in acquiring and implementing services to improve the efficiency and effectiveness of staff as they serve the public.
4. Winnefox recognizes that different libraries have different needs, perspectives, and priorities. Winnefox will encourage innovation by member libraries as long as it does not adversely impact provision of current services to other libraries. Conversely, Winnefox will not impede innovation at individual libraries by insisting on conformity.
5. Winnefox and its member libraries recognize that experimentation is often essential to establish the costs and benefits of new services. However, after a suitable period of experimentation, Winnefox will use a basic cost-benefit analysis of the services it supports so that member libraries have a clear understanding of the implications associated with continuing or abandoning specific projects and/or services.
6. Winnefox and its member libraries recognize that cost-benefit analysis is appropriate for evaluating existing services and will be used as a tool to help with priority setting.
7. Winnefox may sometimes offer basic support for experimental services being carried out by either small groups or individual member libraries. Winnefox will play a role in coordination and communication as libraries develop new services.
8. Winnefox member libraries will be active participants in the annual updating of the Technology Plan by discussing and approving of system wide activities for the coming year.

### **G. Activities**

The development of technology outpaces the needs and priorities identified in five-year plans. It is neither feasible nor desirable to enumerate all the activities that will be carried out in the next five years. Instead, specific activities are enumerated below for 2009-2010 only. Winnefox will provide an annual update to DPI of activities for the

years 2011 to 2014. The Winnefox libraries will be involved in the planning in the same manner as indicated above in the planning section.

### ***2009-2010 Activities***

#### **1. Customer Services**

Winnefox will explore additional options and enhancements for providing library patrons with online readers-advisory assistance.

Winnefox will continue and expand its support of technologies that allow libraries to offer self-service functions, such as self checkout, bill payment, and library card registration.

Winnefox will explore options and work with libraries on expanding services outside of physical library buildings, including services via cell phones and other mobile devices.

#### **2. Community Calendars**

Winnefox will explore, evaluate, and implement at least one option for community calendars that libraries can use on their web sites for the public to update events. Google calendar is one possible option.

#### **3. Websites**

Winnefox will assist as many libraries as possible with redesigns of their websites. Most will be converted to Drupal content-management software with libraries being trained and encouraged to manage and update their own sites.

#### **4. Online Catalog**

Winnefox will follow the developments for the next generation of the online catalog and implement changes when appropriate. Developments include:

- Catalog interface options

- Federated searching (Searching the catalog, magazine indexes, and other databases with a single search)

- Faceted search displays— keyword search results are sorted by subject

- User contributions, such as adding reviews of books

- FRBR-based functionality that groups different bibliographic records for different formats of the same title

#### **5. Indexing and Digitization**

Winnefox will work with libraries to promote and coordinate local digitization efforts, including grant applications.

Winnefox will develop a single-search method for searching the four separate newspaper indexes.

6. Financial Issues and Reporting

Winnefox will work with member libraries to evaluate money management systems and implement a system that includes user credit card payments online and updates the user's record in the automation system.

7. Statistics and Reports

Winnefox will evaluate the SirsiDynix Directors Station, Web Reporter, or other methods for producing reports from the shared automation system and implement new software if appropriate.

Winnefox will explore options for posting library circulation and other use reports online.

Winnefox will evaluate means of standardizing statistical reporting on the use of web sites.

8. Continuing Education

Winnefox will develop and offer tools for the evaluation of library staff technology competencies and provide appropriate staff training or make arrangements for other training opportunities.

Winnefox will expand opportunities for doing online training and conferencing, including using screen casts, podcasts, etc.

Winnefox and member libraries will monitor technology trends and developments for library impacts and will communicate this information with each other.

Winnefox will continue to develop its extranet with accurate and up-to-date content that meets the needs of library staff.

9. New Technologies

Winnefox will work with member libraries to explore, evaluate, and where appropriate, implement new technologies for delivering existing services.

Winnefox will work with member libraries to explore, evaluate, and where appropriate, implement new media and types of library material.

Winnefox will work with member libraries to explore, evaluate, and where appropriate, implement new technology services.

10. Other

Winnefox will collaborate with other organizations to leverage funds.

## **H. Funding**

Funding of the shared automation system and technology support remain high priorities for Winnefox. It is recognized by both the system and member libraries that if Winnefox is to provide a full range of services to its members, member libraries may need to provide funds directly to the system to supplement state aids.

1. The amount of funding member libraries need to contribute toward the cost of technology support from Winnefox depends on the amount of funding available within the Winnefox annual budget to support technology.
2. The amount of funding available from Winnefox to support technology depends on two variables:
  - a) Total funding available to Winnefox including state aids and other sources
  - b) The total cost of all other services provided by Winnefox including mandated services and other services requested by members

Winnefox will actively investigate collaboration with member libraries, other library systems, and/or other public institutions to share the cost of technology and increase benefits to the public whenever possible. Examples of current collaborations include FoxNet fiber optic telecommunications network that includes three libraries in Winnebago County, and the Wisconsin Public Library Consortia for collaborative purchasing of Ebooks and licensing downloadable audio and video. Winnefox will also seek grant funds wherever possible.

## **I. Evaluation**

The effectiveness of incorporating new technology in Winnefox and member library services will be evaluated through:

1. Regular assessment of customer satisfaction at member libraries
2. Collection of statistical data such as numbers of users of public Internet workstations, tracking the amount of time each workstation is in use, web site "hits," Ebook circulation, etc.
3. Comparison of staff technology skill assessments
4. Analyzing anecdotal comments from library users and staff
5. Tracking requests for new services
6. Having regular discussions of technology issues at county Librarian Advisory Committee meetings, WALs meetings, and the annual Winnefox meeting

**Appendix: Special circumstances or exceptions at individual libraries:**

All libraries intend to include technology issues in their regular, individual planning efforts. Planning at the local library level is requisite to planning at the system level since all system services are developed to assist member libraries in meeting their individual service goals. Though all Winnefox libraries have indicated satisfaction with the *Winnefox Technology Plan*, and all libraries consider the Winnefox plan to be their official technology plan for any E-Rate and TEACH funding they may pursue, all reserve the right to pursue and develop different technological paths.