TECHNOLOGY PLAN
2013-2018
SANTA CRUZ PUBLIC LIBRARIES
SANTA CRUZ, CA

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Carson Block
Library Technology Consultant

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Table of Contents
Introduction to Santa Cruz Public Libraries ............................................................... 4
  Santa Cruz Public Library Vision ........................................................................... 5
  Santa Cruz Public Library Mission ....................................................................... 5
  Statement of Purpose from the 2010-2015 Library Strategic Plan ......................... 5
  About SCPL ........................................................................................................... 5
  Select list of resources available to the community ............................................. 5
Description of the Technology Environment ............................................................. 6
  ILS .......................................................................................................................... 6
  Connectivity and Networks ................................................................................. 6
  General ............................................................................................................... 7
  Branches ............................................................................................................. 7
  Library Information Technology (LIT) Staff ......................................................... 8
  Simplified Inventory .......................................................................................... 10
Technology Planning Process .................................................................................... 11
  Technology Plan Vision .................................................................................... 11
  Select Process Milestones for Technology Planning ........................................... 12
  Stakeholders ...................................................................................................... 13
    Purpose ............................................................................................................ 13
    Primary Stakeholders and Engagement ............................................................. 13
  Select Results from Stakeholder Surveys ............................................................. 14
  Select Results from Stakeholder Focus Groups & Interviews ............................. 15
  Library Management and Implementation of the Technology Plan .................... 16
  Technology Plan Stages ..................................................................................... 16
Santa Cruz Public Libraries Technology Plan Goals ................................................. 18
Goal 1: The Library will have an Integrated Library System (ILS) that is a powerful tool for staff in
serving Library customers, managing the Library’s collections, and facilitating key Library
operations .................................................................................................................. 19
  Objective 1: Maintain relative stability with the Evergreen system through migration to a
commercial vendor ................................................................................................ 21
  Objective 2: Identify and select a new Integrated Library System ........................ 21
Objective 3: Migrate to new ILS. ............................................................................................................................................. 21

Goal 2: The Library will have a strong and experienced Library Information Technology (LIT) staff to harness the power of technology in serving Library patrons. ............................................................................. 22

Objective 1: Hire an IT Manager meeting the qualifications described above. ........................................................... 22

Objective 2: Create the correct staffing levels for LIT ............................................................................................... 23

Objective 3: LIT is well managed and plays an active role in the leadership of the Library ......................... 23

Goal 3: The Library will create technology experiences for Library patrons and staff that will connect, inspire and inform. ......................................................................................................................... 24

Objective 1: Technology Shared by Patrons and Staff: Patrons and staff have technology that serves their respective needs efficiently and effectively. ................................................................. 24

Objective 2: Patron Technology: The public has access to the technological tools that will strengthen their ties to the Library ........................................................................................................ 25

Objective 3: Staff Technology: Staff has access to the technological tools that enable them to efficiently and effectively perform their jobs. .................................................................................. 25

Goal 4: The Library will create dynamic community connections around technology by pursuing and maintaining partnerships with local jurisdictions, area organizations, and other community members to ensure the most powerful, efficient and effective delivery of Library services the public. ......................................................................................................................... 26

Objective 1: Forge even stronger partnerships with local jurisdictions to find areas of collaboration that are reflective of the mission of each institution in service of citizens. .......................... 26

Objective 2: Forge even stronger partnerships with the K-12 educational community in Santa Cruz County to find areas of collaboration that are reflective of the mission of each institution in service of citizens. ................................................................................................. 27

Objective 3: Forge even stronger partnerships with the business, nonprofit and technology communities to find areas of collaboration that are reflective of the mission of each institution in service of citizens ........................................................................................................................................ 27

Objective 4: Forge even stronger partnerships with the local higher education community to find areas of collaboration that are reflective of the mission of each institution in service of citizens. ................................................................................................................................. 27

Goal 5: The Library will develop its online presence as a “virtual branch Library.” ........................................... 28

Objective 1: Develop and implement a vision of the “virtual branch” ................................................................. 28

Objective 2: Digitization of Library resources ........................................................................................................ 28

Evaluation Process and Milestones ........................................................................................................................... 30

Appendix I: Objectives and Action Steps ................................................................................................................. 31
Goal 1: The Library will have an Integrated Library System (ILS) that is a powerful tool for staff in serving Library customers, managing the Library’s collections, and facilitating key Library operations.................................................................31

Goal 2: The Library will have a strong and experienced Library Information Technology (LIT) staff to harness the power of technology in serving Library patrons.................................................................33

Goal 3: The Library will create technology experiences for Library patrons and staff that will connect, inspire and inform. .................................................................34

Goal 4: The Library will create dynamic community connections around technology by pursuing and maintaining partnerships with local jurisdictions, area organizations, and other community members to ensure the most powerful, efficient and effective delivery of Library services the public. .................................................................37

Goal 5: The Library will develop its online presence as a "virtual branch Library." .................................39
Introduction to Santa Cruz Public Libraries

There have been many changes in the Santa Cruz Public Libraries since I became the Library Director three and a half years ago. In order to deal with these changes, we have relied on several planning documents to guide us. The 3-5 Year Strategic Plan for 2010-2015 provides overall direction for the services we provide. The Welcoming Place strategic direction addresses the importance of our physical and virtual spaces:

People of all ages and backgrounds will find safe, comfortable, and customer focused physical and virtual spaces which reflect the character of the community and which deliver a 21st century library experience.

A recently completed Facilities Master Plan helps achieve this goal with a focus on physical spaces. This Technology Plan is the counterbalance and addresses our virtual spaces and how we use technology to deliver services in both our physical and virtual spaces.

The Technology Plan provides a vision by identifying five Goals and recommends the steps needed to achieve those Goals. It is a living document that we will reference often over the next 5 years and adjust as new technologies present themselves as the better way to attain our goals.

Thank you to all of the staff, and Board and community members who contributed their voices during the development of this plan. And thank you to Carson Block for his hours of listening that were then converted into this document.

Teresa Landers
Library Director
Santa Cruz Public Library Vision
“Transform lives and strengthen communities.”

Santa Cruz Public Library Mission
“The Santa Cruz Public Libraries enhance Santa Cruz County’s quality of life by providing vibrant physical and virtual public spaces where people connect, discover, and engage the mind. All ages have the opportunity to nurture their love of reading, find diverse and relevant resources for entertainment and enrichment, and strengthen community networks.”

Statement of Purpose from the 2010-2015 Library Strategic Plan
“Connect, Inspire and Inform”

About SCPL
The Santa Cruz Libraries is a city/county Library system providing Library services to Santa Cruz County, California. Its ten branch libraries and bookmobile serve all of Santa Cruz County with the exception of the city of Watsonville, which maintains its own Library.

Select list of resources available to the community

• 10 branch libraries plus Outreach Services
• 1 bookmobile with over 17 distinct stops
• 1 virtual branch (website) offering eBooks and other downloadable content via a variety of vendors, in addition to subscription databases
• Newest Scotts Valley branch opened in June 2011
• SCPL facilities open 348 hours per week as of September 2012
• Public WiFi at all branches from 9:00 am – 9:00 pm daily.
• Collection of 516,167 items
• Staff: 85 full time equivalents in FY2012/13
• Volunteers: 188 volunteers contributed 7,686 hours last year, the equivalent of 3.7 full time employees
• 152 public Internet access computers

Description of the Technology Environment
Although relevant details of the Santa Cruz Public Libraries’ technological environment are placed in context throughout this technology planning document, there are several important aspects of the Library’s “current state” to note:

ILS
• The Library currently uses the open-source Evergreen ILS.
• The Library contracts with Equinox (http://www.esilib.com/esi/) for Evergreen support. Library Information Technology (LIT) provides support for Evergreen for all staff work groups including Circulation, Reference and Collection Management Services.
• The Library’s experience with Evergreen has been uneven. For information please see Goal 1 in this technology plan.

Connectivity and Networks
• The current Library network is a combination of fiber, copper and radio, with some branch Internet connectivity provided by Comcast Cable.
• Due to limitations of current network infrastructure and other factors, the Library only uses VLAN’s (“virtual local area networks” – an advanced networking technology) for the connection of edge switches at each site and for the Library’s IP Telephony systems.
• The Library’s network is Linux with a Samba domain using Linux and Windows workstations.
• The Library is currently working with AT&T on a project to complete the connection of all Library locations with fiber-optics. The majority of project funding is from the federal E-Rate program. AT&T has estimated that the project will take six months to complete from start. Anticipated completion date is June 2013.
• The Library provides both public and staff 802.11x "WiFi” access. Hours of public WiFi availability are from 9:00 am – 9:00 pm daily.
- The Library is currently in the process of upgrading the wireless network using Ubiquity access points. The Library expects to complete the migration by the end of 2014.

General
- Library servers are located offsite. The Library has a co-location agreement with Cruzio Internet ([http://www.cruzio.com/](http://www.cruzio.com/)), with the co-location facility located across the street from the Downtown Library. LIT staff report that the leased server cabinet experiences times of high ambient temperatures. During the consultant’s visit the cabinet thermometer read 94.6 degrees.
- There are multiple flavors of patron workstations in the libraries (Internet, Catalog, Word kiosk, Homework Center, self-check PC), with some computers running Linux with Open Office software and others running Windows with Microsoft Office software.
- Library staff have a number of methods to request support from LIT, including the IRM help desk/asset management system, via the staff intranet, email and telephone. Patrons submit feedback to LIT via the “Webmaster Request” form on the Library’s web site.
- The Library has built its own self-check machines. Staff report medium-to-high use of self-checks with an average of 70% of patron circulation transactions at the Downtown Library and average of 50% elsewhere. The Library’s goal is to have 80%-85% of circulation transactions via the self-check machines.
- The Library provides digital signage (via large-screen televisions) at all Library branches.
- Library staff check-in about 43k items per month. The Library currently does not use Automated Materials Handling (AMH) systems in any of the libraries.
- The Library circulates about 2 million items per year. The Library’s collection uses barcodes for item identification and circulation. The Library does not use RFID.

Branches
- With the exception of newly constructed Library buildings, branch Library network racks are retrofitted with open-frame racks mounted into the ceiling or wall. All installations are neat and tidy, and have made the best possible use of limited space. Most, but not all, are located in secure or semi-secure staff areas.
- With the exception of newly constructed Library buildings, data cabling has been retrofitted at branch libraries. In some cases the only available place to run wire is using external options. Staff report some problems with certain cable installations. Most cable installations are not certified.
Library Information Technology (LIT) Staff

Technology is supported and managed by the Library Information Technology (LIT) Department. Please see the organizational chart below for a listing of positions and descriptions. LIT is dedicated to the specific technology needs of the Library and has demonstrated a focus on excellent customer service.

LIT has been without a manager with technology skills since December of 2011. This is a key need for SCPL, and filling this need is a top priority of this technology plan. Please see Goal 2 for more details.

The technology consultant worked closely with LIT staff during the creation of this plan and observed a group of skilled individuals that also acted as a highly functioning team. The individuals in LIT demonstrate a high level of commitment to the mission of the Library and exemplify that commitment in their service to staff. In surveys, Library staff gave LIT consistently high marks in areas of expertise, customer service, and responsiveness.

Although from the perspective of their customers LIT is doing good work, LIT staff reported feeling short-staffed and too far into reactive activities at the expense of pro-active activities. Goal 2 of this technology plan addresses issues reported by LIT staff.
## Simplified Inventory

<table>
<thead>
<tr>
<th>Location</th>
<th>Staff Computers</th>
<th>Staff Printers</th>
<th>Public Computers</th>
<th>Public Printers</th>
<th>Pub/Staff Scanners</th>
<th>Total computers</th>
<th>Total Printers/Scanners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Headquarters</td>
<td>43</td>
<td>11</td>
<td>n/a</td>
<td>n/a</td>
<td>1</td>
<td>43</td>
<td>12</td>
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<tr>
<td>Bookmobile</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Scotts Valley</td>
<td>12</td>
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<td>40</td>
<td>1</td>
<td>1</td>
<td>52</td>
<td>4</td>
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<tr>
<td>Downtown</td>
<td>52</td>
<td>12</td>
<td>61</td>
<td>2</td>
<td>1</td>
<td>113</td>
<td>15</td>
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<tr>
<td>Aptos</td>
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<td>2</td>
<td>21</td>
<td>1</td>
<td>0</td>
<td>31</td>
<td>3</td>
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<tr>
<td>La Selva Beach</td>
<td>4</td>
<td>1</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>9</td>
<td>2</td>
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<td>14</td>
<td>1</td>
<td>0</td>
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<tr>
<td>Felton</td>
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<td>1</td>
<td>0</td>
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<tr>
<td>Branciforte</td>
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<td>19</td>
<td>1</td>
<td>0</td>
<td>26</td>
<td>3</td>
</tr>
<tr>
<td>Capitola</td>
<td>8</td>
<td>2</td>
<td>9</td>
<td>1</td>
<td>0</td>
<td>17</td>
<td>3</td>
</tr>
<tr>
<td>Live Oak</td>
<td>13</td>
<td>2</td>
<td>29</td>
<td>2</td>
<td>0</td>
<td>42</td>
<td>4</td>
</tr>
<tr>
<td>Garfield Park</td>
<td>4</td>
<td>1</td>
<td>12</td>
<td>1</td>
<td>0</td>
<td>16</td>
<td>2</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>162</strong></td>
<td><strong>38</strong></td>
<td><strong>216</strong></td>
<td><strong>12</strong></td>
<td><strong>3</strong></td>
<td><strong>378</strong></td>
<td><strong>53</strong></td>
</tr>
</tbody>
</table>
Technology Planning Process

The consultant facilitated a technology planning process beginning in the fall of 2012 for the Santa Cruz Public Libraries that recognized and defined a balance between foundational needs and innovation and created a document to guide Library technology efforts for a five-year period beginning in 2013.

Technology Plan Vision
Santa Cruz Public Library Technology Plan Vision

The following bullets define the driving elements of vision behind the Santa Cruz Public Libraries’ Technology Plan:

- **Technology is a means to an end.** The Santa Cruz Public Library views technology as a tool to connect, inspire and inform. Technology is used to help the Library achieve its purpose.
- **Technology is integrated into all Library services and operations.** Since the Library’s technology is embedded in every Library function, it will be designed to operate in a way that is transparent and powerful.
- **Staff will be equipped to harness the power of technology in serving the public.** Staff will achieve a mastery of technology that will enable them to deliver user-driven services in innovative ways.
- **The Library’s approach to technology will be deliberate and strategic.** Like most libraries, technology at Santa Cruz grew in an organic fashion, with varied results. With its significant experience and guided by this plan, the Library will define its technological direction.
- **The community of Santa Cruz will have confidence in the Library’s technology services.** Library patrons in Santa Cruz are a diverse community— from notable tech leaders to those living “off the grid” and many points in-between. They care deeply about their libraries. The Library will embrace community diversity as it chooses goals and priorities for the technology plan.
Select Process Milestones for Technology Planning

- July 2012: the consultant responded to the City’s RFP for technology planning and was awarded a subcontract to develop a Library-specific technology plan under the prime contractor, NexLevel
- October 4-5, 2012: The consultant met with the Library Technology Planning Team, Library Information Technology (LIT) staff, performed initial site tours, and conducted staff focus groups. A NexLevel staff member joined this initial site visit as an observer.
- October 29, 2012: the LIT team commenced weekly (as-needed) meetings with the consultant online using videoconferencing or telephone. Meeting minutes are available for meetings by request.
- October 30, 2012: The consultant provided the LIT team with a draft site visit report
- December 16, 2012: NexLevel conducted staff surveys of user satisfaction with IT services.
- January 17-18, 2013: The consultant conducted a second site visit, meeting the Library director, members of the Joint Powers Authority Board, the Technology Planning Team, and LIT staff. The consultant also conducted two separate focus groups: Library staff and members of the Santa Cruz community.
- January 21-31, 2013: Public Web-User and In-House Technology User Surveys (the latter including questions regarding the ILS) were conducted and the results reported to the LIT team.
- February 1, 2013: The consultant submitted a dossier containing documentation of Library technology inventories, processes, etc., as requested by NexLevel. Emily Galli collected most of the documents with assistance from other LIT members.
- February-March 2013: The consultant and Technology Planning Team began establishing “buckets” based on loose categories of needs that became apparent in the planning process, which eventually were refined into the tech plan’s Goals.
- March 11, 2013: Director Teresa Landers shared a draft of the initial Goals with the Library Joint Powers Board.
- April 2013: Final details of the technology plan were completed.
Stakeholders

Purpose
The purpose of identifying technology plan stakeholders is to ensure that the Library is aware of those affected by the technology efforts of the Library and consider each when determining technology plan elements. In some cases the Technology Planning Team engaged the groups that have been identified through interviews, surveys or focus groups. In other cases, some stakeholders were simply placed in “front of mind” as the team considered technology plan elements.

The Technology Planning Team itself is intended to be representative of the major stakeholder groups: patrons (represented by front line staff supporting public computing); Library management and staff and IT support.

Technology Planning Team Members

- Teresa Landers (Library Director)
- Emily Galli (IT Systems Services)
- Ann Young (Web Developer)
- Diane Cowen (Virtual Services Coordinator)
- Richard Eberle (Person in Charge, DTN branch)

In addition, Jessie Bunker-Maxwell (IT Specialist III/ILS admin) assisted with task identification related to the ILS Goal (Goal 1)

Primary Stakeholders and Engagement
The Technology Planning Team identified the following primary stakeholders and engaged them in various ways, including interviews, focus groups and surveys:

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Engagement Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Director</td>
<td>Interviews and Focus Groups</td>
</tr>
<tr>
<td>Library Staff</td>
<td>Focus Groups and Survey (Survey administered by NexLevel)</td>
</tr>
<tr>
<td>Library Patrons - users of in-house technology</td>
<td>Paper Survey</td>
</tr>
<tr>
<td>Library Patrons – users of web technology</td>
<td>Electronic Survey</td>
</tr>
<tr>
<td>Community Members</td>
<td>Focus Group</td>
</tr>
<tr>
<td>Library Board Members</td>
<td>Interviews</td>
</tr>
</tbody>
</table>


Select Results from Stakeholder Surveys

**Library Staff (Survey conducted by NexLevel)**

- 73 responses
- The Library Information Technology department is valued by Library staff, giving the group high marks for LIT’s skills, technical knowledge, management of technology, and responsiveness.
- Staff reported dissatisfaction with the Evergreen ILS.
- Staff reported satisfaction with staff technology.
- Staff reported dissatisfaction with public computers.

**Patrons (In-house technology)**

- 230 responses
- Patrons are satisfied with the Library’s self-check stations.
- Patrons reported high satisfaction with assistance from staff and speed of the Library’s Internet connection
- Patrons reported low satisfaction with Open Office software
- Patrons reported a desire for improved speed and performance of computers, more computers and longer session times on computers

**Patrons (Web users)**

- 97 responses
- Patrons reported using functions of the ILS (such as searching for Library materials, placing holds and managing their Library account) as a primary reason for visiting the Library website.
- Half of those responding to the survey indicated they were unaware of current electronic Library services such as text & email reference, the Discover & Go (museum pass) program, and the ability to reserve a meeting room online.
- Patrons gave the current website high ratings, but also indicated that the site would benefit from improved navigation & layout, greater control over patron account information, and the ability to pay fines & fees online.
Select Results from Stakeholder Focus Groups & Interviews

Library Trustees (Interviews)
- Expressed goal of providing excellent Library service to the diversity of communities served by SCPL.
- Desired improvements to the Integrated Library System (ILS).
- Desired a powerful Library web site.
- Desired pursuit of partnerships (such as with the K-12 community) to powerfully serve the public.
- Desired new ways to collect & use data to guide and measure the effectiveness of Library efforts.

Community Members (Focus Group)
- Valued the role of the Library in providing access to technology for all members of the community.
- Valued the Library as center of lifelong learning and as key community gathering place.
- Encouraged developing stronger ties & partnerships with local jurisdictions, educational institutions (including K-12 and higher education), the business community, entrepreneurs, the arts community, and others.
- Highly valued the role of staff in facilitating solutions for Library users.
- Desired improvements in the Library’s Integrated Library System (ILS).
- Desired more technology & technology-related services at Library branches and via the Library’s web site.
- Desired digitization of SCPL’s local history archive.

Library Staff (Focus Group)
- Valued their role of connecting patrons to information, ideas and enrichment.
- Valued needs of high tech, low tech and “no tech” users.
- Desired opportunities for the benefits that partnerships could bring to the Library.
- Desired to find ways to serve technical users better (i.e. adding more power outlets, dedicated spaces for patron video conferencing.)
- Desired improvements to the Library’s Integrated Library System (ILS).
- Desired more technology & technology-related services at Library branches and via the Library’s web site.
Library Management and Implementation of the Technology Plan

The LIT Manager, working with the Systems Services Manager, will oversee the implementation of this technology plan. Responsibility for accomplishing specific Objectives and Action Steps will be delegated to appropriate staff both in LIT and throughout the Library. In some cases, they will work with partners in the community to ensure that Action Steps are completed.

Technology Plan Stages

The technology plan is designed to guide the Library through a transformation in the way that technology is used now, and how the Library wishes to use it in the future. The transformation will occur in three stages:

Stage 1: Extinguish “fires” and meet urgent needs (Goals 1 and 2)

Stage 2: Build capacity in systems and staff (Goal 3)

Stage 3: Transition to visionary applications of technology (Goals 4 and 5)

Certain aspects of these stages will naturally overlap with each other throughout the life of the plan as represented in the graphical plan schedule, included as an appendix to this plan. The stages are intended to represent the forward motion of the Library as it works through the technology plan and serve as reference for the Library throughout the plan to determine where it has been, where it is now, and where it is going in the future.
Santa Cruz Public Libraries Technology Plan Goals

**Goal 1:** The Library will have an Integrated Library System (ILS) that is a powerful tool for staff in serving Library customers, managing the Library’s collections, and facilitating key Library operations.

**Goal 2:** The Library will have a strong Library Information Technology (LIT) staff to harness the power of technology in serving Library patrons.

**Goal 3:** The Library will create technology experiences for Library patrons and staff that will connect, inspire and inform.

- **Goal 3a:** Technology Shared by Patrons and Staff
- **Goal 3b:** Patron Technology
- **Goal 3c:** Staff Technology and Management

**Goal 4:** The Library will create dynamic community connections around technology by pursuing and maintaining partnerships with local jurisdictions, area organizations, and other community members to ensure the most powerful, efficient and effective delivery of Library services to the public.

**Goal 5:** The Library will develop its online presence as a “Virtual Branch Library” to meet a growing public appetite for electronic Library services.

In the following sections, each Goal is described in detail. For each, sample Objectives and/or Action Steps are provided for illustrative purposes. Appendix I is a detailed action plan that describes Objectives and Action Steps to achieve the Objectives. This, in its totality, creates a 5 year technology work plan for the Library. It is presented as an appendix as it is expected to change and evolve over the 5 year time span and is in a format that lends itself to such continuous updating and improvement. The Goals will last for the full life span of the Technology Plan.
Goal 1: The Library will have an Integrated Library System (ILS) that is a powerful tool for staff in serving Library customers, managing the Library’s collections, and facilitating key Library operations.

The Integrated Library System, or ILS, is perhaps the single most important technological resource of the Library. The business operations of the Library depend on the ILS, and like the Library’s data network, the ILS touches all patrons and staff in some manner.

In October, 2011, the Santa Cruz Public Libraries entered a brave new world, full of promise, when adopting an “open source” ILS called Evergreen. The base software in open source software is “free,” although many libraries, including SCPL, contract with a vendor for assistance. The “free” in open source represents “freedom” for the Library to have the opportunity to develop the software to meet its needs. Open source can also be considered free as in a “free box of puppies” – meaning not only fun and great potential, but also great responsibility.

While open source ILSs indeed offer great potential, they are also quite literally works in progress. Some features such as circulation perform robustly, while others such as reports, acquisitions, and catalog searching perform poorly or not at all.

During the discovery phase of the technology planning process, the technology planning team discussed the pros and cons of Evergreen in great detail. Over the life of the system at SCPL, staff put in a great deal of work refining and making the software better, while some essential features (including reports) remained elusive. At one juncture, the Library Director, reflecting on the inability to provide even basic statistics such as monthly circulation statistics from the ILS, said it was “embarrassing” not to be able to provide such information to the Library Joint Powers Board. As well, the implementation of Evergreen has a history of issues at SCPL, including service outages, workarounds requiring many staffing hours to address, and complaints from patrons and staff alike on system performance.

Although the base source code for the software is free, there are hard and soft costs associated with open source. A best practice when working with open source is to recognize that the institution is taking a step beyond being a consumer of software and services – and is actually becoming a software developer. When recognizing the developer role, organizations can be successful by investing the time and resources needed to write code, test, and create new and better versions of the software customized to the needs of the organization.
The hard costs in open source are mostly around support – essentially, Library or contract staff - whose primary role is to modify and “build” the open-source software in a custom fashion to meet the needs of the Library. Even with the Library’s support contract with the vendor Equinox, SCPL’s experience has shown that there are a great many areas of need that fall outside of Equinox’s scope. If the Library were to attempt software development outside of its contract with Equinox, those changes would not be supported by Equinox, which offers further complications in terms of normal software upgrades.

Even with a commitment to invest in the costs described here, there is no guarantee of success in a development project. At a minimum, the recommendation would be to hire two on-staff programmers to write and adapt code to enable the Evergreen system to meet SCPL needs. The estimated cost of each programmer would be $100,000 per year including benefits, assuming a programmer skilled in the particular language needed could be found or trained. Training would take a minimum of one year. The purchase of a proprietary system that welcomes the use of third party open source programs would cost about $300,000 for initial implementation and then $65,000 per year for annual maintenance and software upgrades. It is also possible that even with programmers on Library staff there would still be some additional support costs, which are not reflected below. It is clear to see that by year two, the proprietary model is the more fiscally responsible one:

<table>
<thead>
<tr>
<th>TYPE OF SYSTEM</th>
<th>YEAR ONE COST ESTIMATES</th>
<th>YEAR TWO COST ESTIMATES</th>
<th>YEAR THREE COST ESTIMATES</th>
<th>TOTAL 3 YEAR COST ESTIMATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evergreen</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$200,000</td>
<td>$600,000</td>
</tr>
<tr>
<td>Commercial Vendor</td>
<td>$300,000</td>
<td>$65,000</td>
<td>$65,000</td>
<td>$430,000</td>
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</tbody>
</table>

After a great deal of examination and deliberation, the consultant recommends that the Library pursue an off-the-shelf system in the service of improved ILS performance for patrons and staff alike. The Library is not abandoning open-source software (indeed – it will continue to use open source in a number of key areas) and in the future may reconsider an open-source ILS. For now, solutions offered by commercial vendors appear to be more in-line with the Library’s current needs.
The Objectives for this Goal include several major concerns – including diligence in selecting a new ILS and equal diligence in maintaining performance and stability from Evergreen prior to transition. Another major area addressed is staff training and comfort on the new system.

As well as addressing current needs, this decision also represents the Library moving forward with the tools it needs to collect key data – and to use that data as the basis of management decisions.

**Objective 1: Maintain relative stability with the Evergreen system through migration to a commercial vendor.**

**Sample Action Steps include:**

- Create a maintenance plan for Evergreen through migration.
- Create an interim IT staffing plan to facilitate Evergreen maintenance and ILS migration.

**Objective 2: Identify and select a new Integrated Library System.**

**Sample Action Steps include**

- Contract for a consultant to help identify and select a new ILS.
- Go through needs identification, RFP preparation and review, vendor selection and contract negotiation process.

**Objective 3: Migrate to new ILS.**

**Sample Action Steps include:**

- Train Staff on new ILS.
- Migrate patron and collection data.
- Train the public.
Goal 2: The Library will have a strong and experienced Library Information Technology (LIT) staff to harness the power of technology in serving Library patrons.

As the ILS is a mission-critical system for Library patrons and staff, perhaps the most important parts of a Library’s technology effort are the people who make it happen.

In December, 2011, the former IT Manager retired, and since then the System Services Manager has been serving in the role. Although The Systems Services Manager is not a technical manager, she has brought a transformation in the way the IT department is viewed by and interacts with general Library staff by expertly bridging the worlds of all Library work groups and LIT. The person serving as System Services Manager is respected equally by both groups and has been able to be effective in her current leadership role. The improvements brought must be retained as the Library continues to rebuild its LIT staff.

The System Services Manager’s current LIT assignment is only intended as a temporary situation. For the technology efforts of SCPL to thrive and bring transformational services to patrons and powerful tools for staff, the LIT Department needs a qualified and visionary technical manager who can lead technology innovations as well as guide, manage & mentor a talented staff. Among other things, this person must:

- Have technology project management skills.
- Be an excellent communicator.
- Have a thorough understanding of the various technologies used in libraries.
- Possess a keen curiosity about relevant trends.
- Be willing to play an active role in the local Technology Community.
- And most of all have a passion for using technology to serve the public.

The Objectives in this Goal are designed first to identify and hire the type of technical leader that would be the best fit for the Library. Once hired, the new technical manager will be charged specifically with analyzing current roles & job descriptions and making recommendations for a LIT staffing structure that supports implementation of this technology plan, in addition to the broader responsibilities of managing and leading the Library’s IT division.

Objective 1: Hire an IT Manager meeting the qualifications described above.

Sample Action Steps include:

- Modify organizational chart and complete job description for new LIT leadership position.
- After obtaining necessary approvals, recruit, interview and hire new IT Manager.
Objective 2: Create the correct staffing levels for LIT

Sample Action Steps include:

- Analyze current staffing and review in light of changes brought about by new ILS and the needs identified in this plan.
- Recommend appropriate reorganization and staffing.

Objective 3: LIT is well managed and plays an active role in the leadership of the Library

Sample Action Steps include:

- Project management is standardized and systematic.
- Remote management of PCs is implemented.
- Migrate from IRM to a modern, accessible helpdesk and inventory control system.
- IT Manager represents LIT to leadership and senior management.
- Create a technology replacement schedule for staff equipment.
Goal 3: The Library will create technology experiences for Library patrons and staff that will connect, inspire and inform.

The primary reason for technology to exist in the Library at all is to serve the needs of patrons and to provide the tools that staff members need to provide Library services for patrons. In an ideal sense, technology should be both transparent to the user and a powerful part of the Library experience.

The Objectives supporting this Goal follow two major themes: reactive to current needs (as identified through various discovery activities during the technology planning process), and proactive in anticipation of future needs.

This Goal is divided into three subcategories:

- Technology Shared by Patrons and Staff
- Patron Technology
- Staff Technology

Objective 1: Technology Shared by Patrons and Staff: Patrons and staff have technology that serves their respective needs efficiently and effectively.

Sample Action Steps include:

- System is prepared for minor and major disasters:
  - Create IT disaster response & recovery plan.
  - Review and improve data backup processes.
- Network infrastructure is at optimum:
  - Improve network infrastructure.
  - Review and improve the network switches at branches.
- Wireless and mobile access to Library resources is operating at peak levels:
  - Research and implement options for mobile access to current Library resources. Wireless printing is available for public and staff.
  - Measure patron use of wi-fi.
  - Review and improve provision of wireless services.
Objective 2: Patron Technology: The public has access to the technological tools that will strengthen their ties to the Library.

Sample Action Steps include:

- Evaluate and upgrade meeting room technology.
- Evaluate and improve Self-Service Options.
- Create a technology replacement schedule for public equipment.
- Improve functionality of public workstations.
- Improve print, copy, scan and fax services at all Library locations.
- Explore and expand in-Library circulation of patron technology such as laptops, tablets, etc.
- Consider alternate computer arrangements to provide for “quiet” and “noisy” computer spaces in coordination with the Facilities Master Plan.
- Measure user satisfaction and respond to suggestions for improvements.
- Provide technology and spaces for target audiences such as teens, bookmobile users, etc.
- In coordination with Facilities Master Plan, any new facility or remodel should take into account patron power needs.
- In coordination with the Facilities Master Plan, create patron computing spaces that take under consideration patron comfort and convenience as related to technology.

Objective 3: Staff Technology: Staff has access to the technological tools that enable them to efficiently and effectively perform their jobs.

Sample Action Steps include:

- Create a comprehensive training program for staff.
- Measure staff satisfaction with technology, training and equipment.
- Implement AMHS where it proves to be cost effective.
- Continue enhancements to staff intranet.
- Identify tools needed for staff to most efficiently do their jobs and provide those tools.
Goal 4: The Library will create dynamic community connections around technology by pursuing and maintaining partnerships with local jurisdictions, area organizations, and other community members to ensure the most powerful, efficient and effective delivery of Library services to the public.

Santa Cruz is among a handful of communities in the country with deep ties to the technology sector. With Silicon Valley only a short distance away, there are many members of the Santa Cruz community – both known and unknown – who may benefit from a symbiotic relationship with the Library. With a patron-centered approach to partnerships, such opportunities have the potential to benefit all Library users.

More than just the tech community, the Library has a number of opportunities with others in the dynamic micro-communities making up the Library’s service area in the Santa Cruz region – including local jurisdictions, the business community, K-12 schools, and higher education.

One of the greatest challenges for any Library is simply knowing what's happening in different pockets of the community. In an era of increasingly fragmented communications (on a given day, many of us use a dozen non-consolidated ways to interact with each other), a simple strategy of active outreach with key community partners will not only help the Library discover what is happening, but how current and future community resources can be combined to serve citizens.

When pursuing partnerships, the Library will take great care to ensure alignment with the Library’s mission and strategic plan and seek opportunities where partners are “better together” than apart.

The actions from the relationship are anticipated to be “pilot projects” for the Library to try in collaboration with one or more community partners.

Objective 1: Forge even stronger partnerships with local jurisdictions to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Sample Action Steps include:

- Coordinate the use of an agenda management system, such as SIRE, with local jurisdictions.
- Make Library’s attendance management system, AESOP, interactive with City of Santa Cruz’s Kronos system.
- Work with local jurisdictions to explore Open Data initiatives.
- Explore feasibility of Library’s acquisition system (from new ILS) interfacing with City’s financial management system, Eden.
Objective 2: Forge even stronger partnerships with the K-12 educational community in Santa Cruz County to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Sample Action Steps include:

- Continue dialogue with local schools to determine what public Library resources are most valuable to them.
- Continue to provide classes for local schools on electronic Library resources.

Objective 3: Forge even stronger partnerships with the business, nonprofit and technology communities to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Sample Action Steps include:

- New IT Manager is actively involved with the local Tech community.
- Increase collaboration with museums in Santa Cruz County, including the Museum of Art and History, particularly in the area of local history projects.

Objective 4: Forge even stronger partnerships with the local higher education community to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Sample Action Steps include:

- Work with UCSC on local history projects such as oral history.
- Utilize UCSC and San Jose State interns.
- Explore partnerships with Cabrillo College.
Goal 5: The Library will develop its online presence as a “virtual branch Library.”

To build upon work to date (including the selection and successful implementation of a new ILS, improvements in shared, patron and staff computing systems, and the formation of key community partnerships), SCPL will be poised to bring those elements together to build on online presence – a “virtual branch Library” -- with services that rival those available in physical libraries.

The trends are clear: powerful electronic Library services are essential in the information age, and those services are increasingly being demanded in multiple end-user formats, including desktop computers, laptop computers, tablet computers, mobile phones, and other devices.

Building a “virtual Library branch” goes well beyond having a simple website – it requires the same amount of planning, care and resource allocation that a physical branch requires. Success in this area requires a strong base in Library technology mastery, as well as stability in technology services and support.

Objective 1: Develop and implement a vision of the “virtual branch”

Sample Action Steps include:

- The Library will conduct surveys and focus groups to determine patron and staff satisfaction with the current website and test ideas for future services to be offered.
- Based on information above, adapt the web site to meet community needs.
- Upgrade existing Virtual Services Coordinator position to Librarian to lead the development of the virtual branch.

Objective 2: Digitization of Library resources

Sample Action Steps include:

- As part of a larger report on the future of the Library’s local history collection, develop a plan for digitization of the various collections, such as photographs, maps, local magazines and newspapers.
- Digitize the sheet music collection.
Many of the initiatives described in the plan can be paid for out of the annual LIT budget. Several, however, will require a commitment of resources beyond the regular operating budget. These are listed here:

<table>
<thead>
<tr>
<th>INITIATIVE</th>
<th>ESTIMATED COST</th>
<th>ESTIMATED DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Migration to new ILS, including cost of a consultant to lead staff through selection and contracting process, temporary staff assignments, cost of the system itself, and migration of data</td>
<td>$350,000</td>
<td>Begin April 2013</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Completion February 2014</td>
</tr>
<tr>
<td>Upgrade system wireless technology</td>
<td>$45,000 total</td>
<td>Completion by June 2014</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Some work done by June 2013</td>
</tr>
<tr>
<td>Provide laptops or tablets for in-Library use by patrons</td>
<td>$50-100,000</td>
<td>TBD</td>
</tr>
<tr>
<td>Reorganization and possible new positions in LIT</td>
<td>TBD</td>
<td>January 2015</td>
</tr>
<tr>
<td>Annual maintenance on new system</td>
<td>$65,000</td>
<td>Begin March 2015</td>
</tr>
<tr>
<td>Redesign of Library Web Site</td>
<td>$25-50,000</td>
<td>TBD</td>
</tr>
<tr>
<td>Convert Branch servers from Linux to Microsoft</td>
<td>TBD</td>
<td>TBD</td>
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Evaluation Process and Milestones

This technology plan is intended to be a living document to deliberately guide relevant efforts at the Santa Cruz Public Libraries over a five-year period. The main body of the plan includes the Goals and sample Action Steps that help attain that Goal. In addition, Appendix I is an action plan that, by Goal, establishes Objectives and Action Steps, including resources needed and a timeline or deadline for completion.

Over the five-year period of the plan, the LIT Manager will report progress to the Library’s Senior Management Team, three times per year in October, February and June. The Library will provide an update to the spreadsheet in Appendix I indicating progress on each Objective/Action Step and fitting into the following framework:

- Scheduled Objective and/or Action Step is complete.
- Scheduled Objective and/or Action Step is partially complete.
- Scheduled Action Step and/or Objective has been eliminated. (Why?)
- Scheduled Action Step and/or Objective has been deferred. (Why? and When?)
- A new Action Step and/or Objective has been identified.

The LIT Manager will use the Goals as his/her primary guide in working with LIT staff to establish an annual work plan for the LIT division.

“What gets measured gets done” – attributed to various sources
Appendix I: Objectives and Action Steps

This appendix contains the plan goals with the supporting actions (objectives and action steps) designed to support completion of the goals. As is the nature of planning and implementation, objectives and action steps may change as needed, but the goals of the plan will endure.

Goal 1: The Library will have an Integrated Library System (ILS) that is a powerful tool for staff in serving Library customers, managing the Library’s collections, and facilitating key Library operations.

Objective 1: Maintain relative stability with the Evergreen system through migration to a commercial vendor (through February 28, 2014).

- Action Step 1: Identify problems with Evergreen system that need remediation in order for the Library to function until the library migrates off of Evergreen and develop plans for that remediation.
- Action Step 2: Identify current projects that require continued efforts to make Evergreen work for SCPL and evaluate which if any of these projects we must or want to maintain.
- Action Step 3: Create a maintenance plan for Evergreen through migration.
- Action Step 4: Begin work to normalize data in anticipation of migration.
- Action Step 5: Decide on and announce to staff the level of service that Library IT can provide to staff and the public for Evergreen as the migration progresses given maintenance plan requirements.

Objective 2: Create an interim IT staffing plan to facilitate Evergreen maintenance and ILS migration by March 31, 2013.

- Action Step 1: Determine interim IT staffing needs to implement maintenance plan and provide ongoing support based on #1.
- Action Step 2: Arrange for contract and/or consulting services as needed to implement the Evergreen maintenance plan.
- Action Step 3: Appoint a staff person to serve as Migration Coordinator from April 1, 2013 through 30 days post migration.
- Action Step 4: Decide on distribution of duties for both ongoing Evergreen maintenance and ILS migration between Migration Coordinator and ILS System Administrator.
**Objective 3: Identify budgetary needs for Library IT staff and equipment.**

- Action Step 1: Secure outside contract and consulting services such as ILS Selection Consultant, Network/System Administration, etc.
- Action Step 2: Identify interim staff such as Migration Coordinator.
- Action Step 3: Equipment such as replacement for and/or more powerful components for the Evergreen Database Server.
- Action Step 4: Determine costs of migration - see #5 and #6 below.

**Objective 4: Identify and select a new Integrated Library System by August 31, 2013.**

- Action Step 1: Contract with consultant to advise on and assist with new ILS selection procedures by April 2, 2013.
- Action Step 2: Create staff committees by April 15, 2013 that will assist in evaluating each ILS module during the ILS selection process. Committee responsibilities may include: developing needs assessment lists; research on vendor products; visits to other libraries to evaluate ILS candidates; remote "visits"/interview with other libraries’ staff to evaluate ILS candidates; reviewing vendor presentations; and working with the ILS Selection Consultant.
- Action Step 3: ILS Selection Consultant will work with Library staff to create and publish an RFP which will require responses no later than July 20, 2013.
- Action Step 4: ILS Selection Consultant will work with Library staff committees, Migration Coordinator and Library IT to evaluate ILS candidates during the month of August 2013.

**Objective 5: Contract for new ILS by October, 2013.**

- Action Step 1: ILS Selection Consultant will work with Library Staff and City Attorney and Vendor to produce a satisfactory ongoing maintenance and support contract for the Library.
- Action Step 2: ILS Selection Consultant will work with ILS Migration Coordinator, Library Training Coordinator (and other staff if needed) to develop a one-time, initial training contract/agreement that will provide a test system on which staff training can be done.
- Action Step 3: ILS Selection Consultant will work with Library ILS System Administrator, ILS Migration Coordinator and other appropriate library staff to develop a migration services contract.

**Objective 6: Migrate to new ILS by February 28, 2014.**

The decision on Goal 1, Objective 2, Task 4 will determine who will be responsible for some of the following tasks, so responsibility is not noted in this task list.

- Action Step 1: Announce migration decision to Equinox by March 31, 2013.
- Action Step 2: Review migration procedural document from new ILS vendor.
• Action Step 3: Make arrangements as needed with Equinox to extract our data unless new ILS vendor will be handling this.

**Objective 7: Train Staff on new ILS by February 28, 2014.**

• Action Step 1: ILS Migration Coordinator and Library Training Coordinator will work together with the new ILS vendor to develop and schedule staff training.
• Action Step 2: ILS Migration Coordinator will develop a staff training manual.
• Action Step 3: ILS Migration Coordinator will develop documentation for procedures, policies and workflows.

**Objective 8: Train Public on new ILS (ongoing)**

• Action Step 1: Determine appropriate ways to inform public that ILS is changing.
• Action Step 2: Create learning and communication opportunities for public through staff engagement.

**Goal 2: The Library will have a strong and experienced Library Information Technology (LIT) staff to harness the power of technology in serving Library patrons.**

**Objective 1: Hire an IT Manager meeting the qualifications described above by August 31, 2013.**

• Action Step 1: Review and revise organizational chart and job description in coordination with City Human Resources Division by June 30, 2013.
• Action Step 2: If necessary, get LJPB and City Council approval of revised position by June 30, 2013.
• Action Step 3: Post position by July 8, 2013.
• Action Step 4: Recruit, interview and hire by August 31, 2013.

**Objective 2: Create the correct staffing levels for LIT by January 2015**

• Action Step 1: Analyze current staff responsibilities and tasks by April 30, 2014.
• Action Step 2: Determine needed staff responsibilities and conduct a gap analysis by May 31, 2014.
• Action Step 3: Make recommendations for staffing reorganization and/or additional staff needed by June 15, 2014.
• Action Step 4: Work with City Human Resources to revise and create job descriptions as needed by July 30, 2014.
• Action Step 5: Get new positions approved by LJPB and City Council for midyear FY14/15 budget adjustment year by October 2014.
Objective 3: LIT is well managed and plays an active role in the leadership of the Library

- Project management is standardized and systematic by 12/31/13.
- Remote management of PCs is implemented.
- Migrate from IRM to a modern, accessible helpdesk and inventory control system.
- IT Manager represents LIT to leadership and senior management.
- Create a technology replacement schedule for staff equipment.
- Move LIT from reactive to proactive posture.

Goal 3: The Library will create technology experiences for Library patrons and staff that will connect, inspire and inform.

This Goal is divided into three subcategories:

- Technology Shared by Patrons and Staff
- Patron Technology
- Staff Technology

With technology plan goals 3-5, the new manager of LIT will be responsible for scheduling and implementing objectives and action steps. Objectives and action steps for goals 3-5 have been assigned a priority to assist in scheduling and implementation.

Objective 1: Technology Shared by Patrons and Staff: Patrons and staff have technology that serves their respective needs efficiently and effectively.

Action Steps – Priority 1

- Complete network fiber migration - AT&T (current project planned from 3/13 through 7/31/2013).
- Complete current wireless project (current project planned from 6/1 through 8/31/13).
- Count use of patron WiFi.
- Build domain controller (after fiber project completed).
- Build Windows deployment toolkit server.
- Establish inventory and replacement schedule for all library technology.
- Review service contracts on major network and server components.
- Review Cruzio agreement and stats to determine if co-location environmental conditions are proper (i.e. review Cruzio SLA).
- Collect and use data to inform library decisions: desired impacts, identification, collection & patron privacy/confidentiality.
- Improve remote management of PCs.
- Create IT disaster response & recovery plan.
- Replace projector in Downtown library - IR problem with remote (following the ILS migration).

**Action Steps – Priority 2**

- Migrate to managed switches at branches.
- Consider adjustments to on-call and weekend coverage; staff currently "on call" 24/7 with no backups for each other.
- Perform technology budget review and adjustments annually.
- Deploy two-monitor setups for ref (one screen for staff, other for patron).

**Action Steps – Priority 3**

- Consider adding “makerspaces” to select library locations.
- (With facilities plan) Perform a power audit of all library buildings and add power conditioning where patrons need it (seating & other areas).
- (With facilities plan) explore ways to standardize cooling and security for any closed equipment rooms.
- Conduct study to determine viability of RFID.
- (With facilities plan) Inventory data cabling at all library locations and plan wiring upgrades (minimally to category 6 and a certified wiring installation).

**Objective 2: Patron Technology: The public has access to the technological tools that will strengthen their ties to the Library.**

**Action Steps – Priority 1**

- Consolidate patron workstation computer builds into single platform to offer preferred computing experiences and software (i.e. Microsoft Office).
- Consider adding a print and time management system for patron computers (Print/time management to follow standardization of patron workstations).
- (With facilities plan) Standardize a/v in all meeting rooms throughout the library system.
Action Steps – Priority 2

- Offer patron printing on WiFi network.
- Expand in-library circulation of patron technology, including in-house mobile devices (following the ILS migration).
- Improve points of self-service: improve self-checks (technology and placement in branches) to meet goal of 80-85% use.
- Improve Teen Spaces with technology.
- Consider adding more technology and technology services to the bookmobile.
- Offer increased support for SoHo (Small Office/Home Office) users.
- (With facilities plan) Seek ways to offer patrons comfortable and roomy computer spaces.

Action Steps – Priority 3

- (With facilities plan) Study the viability of adding Automated Materials Handling to automate aspects of materials returns at one or more branches.

Objective 3: Staff Technology: Staff has access to the technological tools that enable them to efficiently and effectively perform their jobs.

Action Steps – Priority 1

- Take steps to increase staff technology comfort & mastery; consider creating "Technology Sherpas" in staff labs and offer tech assistance to patrons in labs and on the floor.
- Upgrade staff technology in accordance to technology replacement schedule.
- Implement an Agenda Management System.
- Improve data backups.

Action Steps – Priority 2

- Provide technology support for any new staffing initiatives such as “roving reference.”
- Consider using vendor to retroactively clean patron database.
- Migrate from IRM to a modern, accessible helpdesk and inventory control system (following the ILS migration).

Action Steps – Priority 3

- Consider “Fob” system for building & secure access.
- Explore ways to synchronize electronic timecard systems between the library and the City.
Goal 4: The Library will create dynamic community connections around technology by pursuing and maintaining partnerships with local jurisdictions, area organizations, and other community members to ensure the most powerful, efficient and effective delivery of Library services to the public.

With technology plan goals 3-5, the new manager of LIT will be responsible for scheduling and implementing objectives and action steps. Objectives and action steps for goals 3-5 have been assigned a priority to assist in scheduling and implementation.

Objective 1: Forge even stronger partnerships with local jurisdictions to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Action Steps – Priority 1

- Coordinate the use of an agenda management system, such as SIRE, with local jurisdictions.
- Make Library’s attendance management system, AESOP, interactive with City of Santa Cruz’s Kronos system.

Action Steps – Priority 2

- Investigate ways to integrate eGov services into library services.
- Work with local jurisdictions to explore Open Data initiatives.

Objective 2: Forge even stronger partnerships with the K-12 educational community in Santa Cruz County to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Action Steps – Priority 1

- Continue to provide classes for local schools on electronic Library resources.

Action Steps – Priority 2

- Continue dialogue with local schools to determine what public Library resources are most valuable to them.
Objective 3: Forge even stronger partnerships with the business, nonprofit and technology communities to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Action Steps – Priority 1

- The New IT Manager will be actively involved with the local Tech community.
- Develop networking, community awareness and other outreach skills to develop “relationship- radar” to explore ways to discover what community innovations are happening and find opportunities to collaborate.

Action Steps – Priority 2

- Increase collaboration with museums in Santa Cruz County, including the Museum of Art and History, particularly in the area of local history projects.
- Create partnerships within the business community.
- Find partnerships in the innovators’ community, from “two guys in their garage” (inventors, innovators & startups) to more formal organizations such as the Makers’ Factory.

Objective 4: Forge even stronger partnerships with the local higher education community to find areas of collaboration that are reflective of the mission of each institution in service of citizens.

Action Steps – Priority 1

- Explore UCSC as a community partner.
- Utilize UCSC and San Jose State interns.

Action Steps – Priority 2

- Work with UCSC on local history projects such as oral history.
- Explore partnerships with Cabrillo College.
Goal 5: The Library will develop its online presence as a “virtual branch Library.”

With technology plan goals 3-5, the new manager of LIT will be responsible for scheduling and implementing objectives and action steps. Objectives and action steps for goals 3-5 have been assigned a priority to assist in scheduling and implementation.

Objective 1: Develop and implement a vision of the “virtual branch”

Action Steps – Priority 1

- Upgrade existing Virtual Services Coordinator position to Librarian to lead the development of the virtual branch.
- Look at best of breed (including San Jose PL UX, others) as inspiration for possible website services

Action Steps – Priority 2

- The Library will conduct surveys and focus groups to determine patron and staff satisfaction with the current website and test ideas for future services to be offered.
- Based on information above, adapt the web site to meet community needs.

Objective 2: Digitization of Library resources

Action Steps – Priority 1

- As part of a larger report on the future of the Library's local history collection, develop a plan for digitization of the various collections, such as photographs, maps, local magazines and newspapers.

Action Steps – Priority 2

- Digitize the sheet music collection (only for works in the public domain)