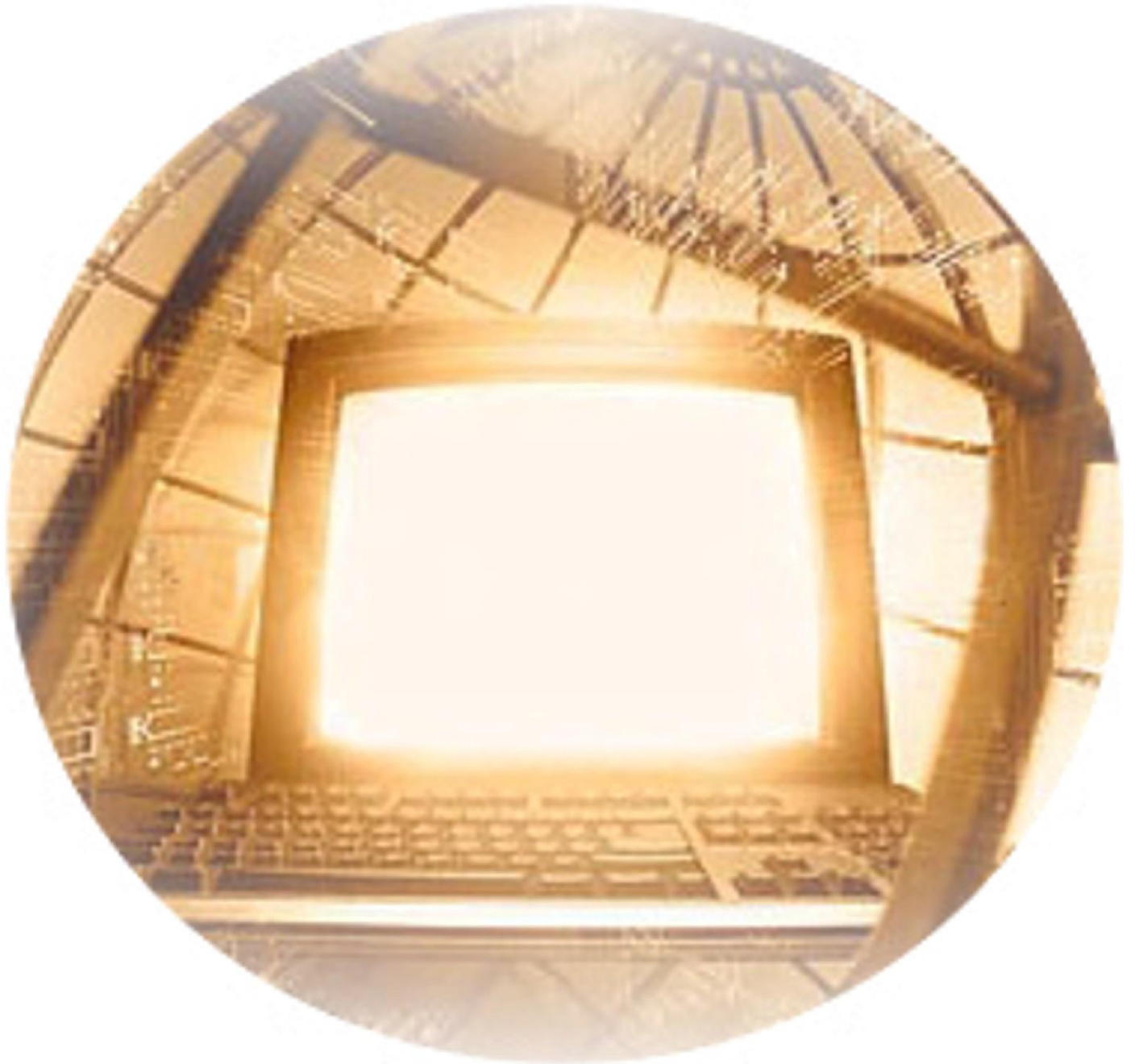


# TRAVERSE DES SIOUX LIBRARY SYSTEM TECHNOLOGY PLAN 2008-2011



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# Traverse des Sioux Library System Technology Plan 2008-2011

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## I. Planning and Needs Assessment

### Organization Leadership and Planning Committee

The following people directly participated in the planning process:

Patty Biesterfeld, TdS Acting Director	Renee Schneider, Blue Earth Co. Library
Jeanne DeMars, TdS Automation Coordinator	Carolyn Baird, New Ulm Public Library
John Miller, TdS Technology Librarian	Mary Jane Ohland, Sibley Co. Library Service
Brian McCormick, Martin Co. Public Library	Nancy Steele, SMILE director

Others include the Advisory Council of Member Library Directors and the TdS Board of Directors and TdS Staff.

### Demographics

The Traverse des Sioux Library System (TdS) service area includes the nine counties in south central Minnesota: Blue Earth, Brown, Faribault, LeSueur, Martin, Nicollet, Sibley, Waseca and Watonwan. These nine counties comprise over 5,064 square miles - approximately 6.32% of the state's total area. The 2000 census data was reported at 222,790 with a projected population of 231,100 in 2010. The population projection's indicate that the region will see a mix of population growth and loss with significant increases overall in the 65+ age group.

The number of individuals age 55-64 increased by more than half the previous decade, making it the fastest growing age group. The group, ages 0 -24 declined over the same period as did those in their primary earning years, ages 35-44. Nicollet County is exceptional in showing gains in both the 0-4 and 80-85+ age categories—a service challenge at both ends of the age spectrum.

While most counties added population, the region's growth (3%) was much slower than the state's average of 12.4%. LeSueur, Waseca and Sibley counties all saw growth from 7-9% from 1990-2000. Two of the three largest cities, Mankato and New Ulm grew at about 3% from 1990-2000. Lake Crystal and Montgomery both grew over 16% and experienced this growth primarily because they are located outside of larger communities. Population continues to decline in Martin, Faribault and Brown counties.

The region, like the State as a whole, remains overwhelmingly white residents at 96.4 %. However, most of the population growth in the region consists of the non-white population. These populations are primarily Latino, Asian, and Native Americans, with a smaller percent of black and African-Americans or those of multiple racial identity. Blue Earth County is the exception, with larger numbers of Latino, Asian, black or African-Americans, and a much smaller number of Native Americans. According to the 2000 census data, 6.4 percent of the population in our member library counties spoke a language other than English, with approximately 1% reporting that they spoke English "not well" or "not at all". The

largest percentage of non-English speaking people by county was Watonwan (18.9%), followed by Sibley (10%) and Le Sueur (7%). Spanish language represented the highest percentage, followed closely by a generic “Indo-European” grouping of languages, then a sharp drop for the Asian-Pacific family of languages, and an even smaller percentage of “other”.

In 2004, the region’s top-employing private industries were manufacturing, healthcare and social assistance and retail trade, followed closely by food service, construction, information and wholesale trade. Unemployment rates remain substantially lower than state and national levels. Employees and residents are traveling greater distances for work than a decade ago.

## **Needs Assessment Method and Results**

*The Traverse des Sioux Library System Strategic Plan 2007-2010* (see attached), approved by the Traverse des Sioux Library Board of Directors on September 21, 2006, was an essential reference for writing this document. The Strategic Plan, developed with the assistance of a consultant, involved detailed interviews with library directors, TdS staff, and Board members, as well as group consensus building through a series of intensive workshops. In addition to the Strategic Plan, an assessment survey (see attached) was sent to each library director and they were encouraged to discuss it with their staff. The survey included questions about hardware and software inventory, telecommunications, automation system, new technologies, Internet, e-mail, library policies, and skill level and training for staff and patrons, and assessment of services provided by TdS. The survey also asked open-ended questions designed to solicit information about demographic change, special challenges, new technologies and support.

“Guiding Questions” from the Minnesota Department of Education’s *2008-2011 Technology Planning Checklist for School Districts, ... and Public Libraries* were used to develop technology objectives that relate to the Traverse des Sioux Library System’s Strategic Plan and the needs identified in the assessment survey.

## II. Vision, Objectives, Strategies

The new TdS vision statement created with the Strategic Plan is: *“Working Together to Achieve Greater Results.”* The application of technology must support that vision. TdS Mission Statement is: *TdS exists to promote cooperation, provide support services, and coordinate shared access to needed resources, programs, and technologies to member libraries.*“

Key goals for 2007-2010 are:

- Assure strong cooperation and communication across the system
- Assure a strong financial future
- Explore and utilize emerging technologies
- Broaden services to member libraries

Within those overarching goals, there are number of strategies which can be achieved with the use of technology, such as the use of a Blog to enhance cooperation and communication throughout the region, expanding wireless to improve access to information sources, implementing new features of our automation system to broaden services to patrons and staff. The Strategic Plan also calls for TdS to keep member libraries apprised of technological developments and to continue to train staff in effective use of existing technology.

Section VIII will detail the specific objectives and strategies we will use to provide technological support to the libraries, and indirectly, to the citizens of the region.

### Delivery of services

Traverse des Sioux Library System (TdS) is a federated, regional public library system serving all public libraries in the nine counties of south central Minnesota.

Traverse des Sioux Library System is one of twelve regional systems in Minnesota providing services to 96 percent of the state’s population. Begun in 1957, this network of regional public libraries provides efficiency in library operation as well as improved access to materials and information through resource sharing and delivery

Some of the many services Traverse des Sioux provides include:

- Region-wide library borrowers card
- Inter-regional loaning and borrowing
- Interlibrary loan
- Administration of regional shared integrated online catalog, shared bibliographic and patron databases, training and technical support
- Gateway to Minnesota academic, public, school & special libraries
- Administration of regional telecommunications network
- Access to indexes and databases
- Technical support
- Delivery
- Cataloging and data base maintenance
- Cooperative purchasing
- Reciprocal borrowing contracts with other public libraries and regions
- Consulting, continuing education and training
- Coordination of winter and summer library programs & other region-wide events

- Grant writing and regional participation in funded grant opportunities
- Library advocacy
- Provision and management of e-mail accounts for all staff in region
- Website for public and staff information and web hosting for member libraries
- Regional coordination of the Minnesota Voluntary Certification Program for Public Library Workers

These services can be summarized under the more general topics of access, automation, delivery, resource sharing, technical services, and training as described in the attached Strategic Plan. Member libraries provide direct public library services to library patrons which include: access to print and non-print materials, as well as services such as story hours, internet training classes, word-processing and spreadsheet software on public access computers, and meeting room facilities. Member libraries have created partnerships with local foundations, banks, Chamber of Commerce's, Community Ed, ESL/GED programs, school summer reading programs, historical societies, garden clubs, day care centers, nursing homes, assisted living facilities, and many other community organizations.

## **Technology Access**

Project SOCRATES (South Central Regional Area Telecommunications System) provides/manages data and video connectivity to most of the public libraries in the Traverse des Sioux region. SOCRATES also provides instructional and educational distance education opportunities, provides access to world-wide information resources, and reference and research services for public libraries.

The following are also available through Project SOCRATES:

- Continuing operations management and problem resolution.
- Continuing review and enhancement of the SOCRATES telecommunications and Internet access services program, including facilitation and development of cost effective and service efficient cooperative solutions to local problems
- Financial oversight (i.e. budgets, accounting, grants management, and audits)
- Professional services, including legal research and assistance, E-Rates assistance, consultation on request, and E-Management services for administration and data management
- Conducting on-going program reviews which will provide the best possible financial arrangements and services management, reduce 'fixed costs' to the lowest possible level, and maximize cost/benefit results
- Development of grant proposals for regional projects
- Legislative process monitoring and information input
- Communication and information dissemination
- Arrangement and scheduling of video connectivity for ITV, video field trips and instructional experiences, and meetings, workshops, and seminars
- Development of Web site for communication of services provided and of organizational, technical and administrative services
- Provision of technical support and maintenance services, and access to data and video consultant services

Thirty-one TdS member libraries are open to the public 1,188 hours weekly have between 450K – 1,536K of bandwidth available with most of the larger libraries with 1,536K. In the region there are 17 LADS sites, 6 DSL sites and two libraries with cable connectivity. Onvoy is the network vendor since summer 2006. The TdS Office has two T1 lines and has wireless capability as do 18 other member library sites. All headquarters libraries are wireless, with one exception.

## **Administrative Support**

TdS Administrative staff at the time of writing this plan consists of an Acting Director and an Administrative Specialist. TdS employs one FTE automation coordinator and one FTE technician to provide support for the automation system, network coordination, and hardware support.

The TdS Advisory Council of Member Library Directors is an advisory committee and recommends policy to the TdS Board of Trustees. The Board of Trustees established by M.S. 134.34 has legal, financial, policy- making and planning responsibilities for TdS regional services.

Project SOCRATES (South Central Regional Area Telecommunications System) provides data and video connectivity to TdS and the member libraries. The TdS Technical Librarian, under the supervision of the Automation Coordinator, is the liaison between the libraries and SOCRATES and helps manage the region's network from the TdS office. TdS and SOCRATES staff can view the speed and usage of DSL lines with a software program called *The Zone*.

The TdS Strategic Plan also calls for exploration of the need for and feasibility of additional staff. TdS is seeking a new Executive Director to be in place by Summer 2007. TdS also needs to look at the possibility of additional staff hours in the area of automation.

Skills and experiences of member library directors and staff will be inventoried in order to enhance the performance of the entire system through sharing of expertise and best practices.

On the Survey, as described in Section 1, Page 3, Technical support for the telecomm network (through Socrates and local network providers) was rated 3.18 on a scale of 4 (high) to 1 (low). 4.

See Section IV *Tech Staff Support* for further details.

## **Professional Development**

The TdS Strategic Plan has two overarching goals and key results that relate to professional development. The Goal to “*Explore and utilize emerging technologies,*” includes a strategy to offer training opportunities in support of that goal, and to “*preview and explore affordability of increased formats, wireless, and on-line information technologies with member libraries.*” The Goal to “broaden services to member libraries” includes a strategy of promoting state-wide continuing education opportunities. See Section VI for further details.

### **III. Policies and procedures**

#### **Equitable Access for Patrons with Exceptional Needs**

The results of the Technology Plan Survey indicate that ten libraries in our region have written policies for ADA compliance. One library provides low vision software (Zoomtech).

Using *Watchfire Bobby*, a commonly accepted Web ADA analysis tool, the TdS homepage generated numerous warnings at priority 1 standards. The OPAC (iBistro from SirsiDynix) meets *Bobby's* priority 1 standards and complies with the standards set forth in Section 508 of the U.S. Rehabilitation Act. TdS will need to work toward bringing the TdS homepage into priority 1 compliance.

Twelve member libraries have their own websites. Few are updated with any frequency. It was not surveyed to determine if those websites comply with web accessibility guidelines.

Ten libraries indicate that they have written policies for ADA compliance. More information is provided in Section IV, Page 10.

#### **Data and Network Security**

The Survey indicates that ten libraries have written policies on data privacy and 12 libraries have written policies on computer security. On public PCs, nine libraries use automatic time-outs and/or screen-savers to protect the privacy of the previous patron.

Only six libraries have a written disaster recovery plan. TdS has a draft plan. Only nine libraries do regular backup of computer data files. An uninterruptible power supply is in use at eight libraries. TdS Office has two uninterruptible power supplies—one for the network equipment and one for the server. Every library indicates that they have surge protection. Most libraries (15) keep their network equipment in a secured area. Everyone has firewall protection for both staff and public PCs. PCs are password protected but only four libraries regularly change or delete passwords, so this is an area that needs improvement.

SirsiDynix hosts our system server. TdS has contracted with SirsiDynix to provide secure access to the server in Atlanta, with nightly backups of all data.

Member library staff do not have authorization to view the charge history of a user's record. All social security numbers have been deleted from the system. Patrons must have both their barcode and password to log on to their system account.

TdS recently upgraded the firewall. The new TdS firewall incorporates many desirable features including an 802.11b/g wireless access point with WPA and WEP security options. In addition the firewall, by default, places the wireless network on an entirely separate network segment from the rest of the LAN, thus protecting the primary network, while allowing less restrictive wireless access policies. Other new features include: Packet

prioritizing, extensive VPN access for any remote staff, and many more log/monitor features than the previous TdS firewall.

TdS Technical Support continues to look at new options for security and anti-spyware software. At this time, TdS uses Postini for anti-SPAM protection contracted through Project SOCRATES. Anti-virus software (McAfee V-shield) is widely used throughout the region. At the beginning of 2007, TdS recently did a batch purchase of 265 licenses for the anti-spyware program, WebRoot's Spy Sweeper.

More libraries could take advantage of system restoration software for their PCs. Only four libraries reported using this software to backup their PCs.

On the Survey scale of 4 (high) to 1 (low), the level of satisfaction with PC and local network security is 3.31. System-wide network security is rated 3.5. One library commented, without explanation, that the system-wide network may somehow violate patron privacy and that local PC and network security has "unacceptable capabilities from shared circuit (violates ethical standards)". Another library commented that they wish the public couldn't save to public PCs at all.

### **Internet Safety and CIPA Compliance**

All member libraries and branches comply with CIPA (Children's Internet Protection Act). The firewalls include filtering capability. WatchGuard Wireless Edge X Firewalls are in use at larger sites and the SOHO-6 units at smaller libraries. All of these units include a subscription (annual renewal is required on the Edge) to the WatchGuard WebBlocker (SurfControl) product. WebBlocker includes a specific category for Adult/Sexually explicit sites. The SOHO units allow additional sites to be blocked or allowed via IP number/range, while the Edge units also incorporate a URL block/allow feature. It is also possible to block types of data, such as chat, by port as well. TdS headquarters also uses the WatchGuard firewall to ensure CIPA compliance with staff and for the public use lab PCs.

All libraries, except for one, have a written internet acceptable use policy and/or filtering statement.

## **IV. Tech Infrastructure, Management, & Support**

### **Telecommunications Capacity**

Project Socrates has contracted with Onvoy, Inc. to provide adequate bandwidth for current applications and for future demand. The switch to Onvoy, which occurred in June 2006, offers a greater presence in the statewide telecommunications infrastructure, increased flexibility, depth of service and support staff for greater reliability, “next generation” services, value added services, overall increased bandwidth for less cost, and the ability to monitor and control usage. Total regional bandwidth is 68Mb/s. There is built in escalation of bandwidth depending on number of total users. Online video gaming, downloadable movies, audiobooks, and music have put greater demands on the bandwidth, but there is the capability to use packet shaping to prioritize different kinds of data if necessary.

Currently, 14 libraries have wireless networks in place. Eight libraries provide hardwired ports for patrons with laptops or PDAs. The survey indicates that 14 libraries also feel that they have sufficient network hardware and wiring capacity to add more PCs.

Satisfaction with internet access and performance was rated at 3.18, on a scale of 4 (high) to 1 (low), as was support for the network. Several comments were made about speed and downtime, as well as sharing lines with the schools. LADS lines shared with schools have created some difficulty if schools are not in session and decide to shut their server/network down and do not always notify the public library.

TdS headquarters has two full T1 lines for 12 staff PCs and 11 lab PCs, plus ITV capability. We expect the two T1 lines to provide us with adequate capacity over the next few years.

### **Assistive Technology**

One library provides Zoomtech for low vision patrons. Another library has the following:

Enhanced Vision’s Merlin, a tabletop video magnifier system  
LightSPEED LES370 Listening Enhancement System, wireless system allowing voice amplification  
LightSPEED LES 750iR Infrared Classroom Amplification System – enhanced hearing capability  
LES370 and 750iR Systems

There are eight 8 low-vision machines in the region. While TdS does not provide any special equipment, most PCs include built-in accessibility features standard in Windows XP, as well as sound cards/speakers.

## **Equipment access for delivery of services**

There are a total of 266 public PCs in the region. Of those, 29 are designated only for iBistro. 24 are designated for adult use only, and 35 are designated for children only. 75 are in a computer lab area. 52 are designated for games and internet access only. Three laptops are available for the public to check out. There are 131 PCs for staff, with an additional 11 laptops. Only a couple of sites indicated that they would be adding to their current total. Some thought they'd have fewer. Overall, libraries seem to be satisfied with the number of PCs, but not necessarily with the age and performance (see next section).

## **Average age of equipment for services**

Based on the operating system software on each PC, our libraries have fairly current machines. A number of grant opportunities within the last year or two enabled the purchase of new PCs for many libraries. The overwhelming number of PCs (90 staff and 154 public), run on a Windows XP platform. There are nine staff PCs and 42 public PCs running on Windows 2000. There are still 16 public PCs running Windows 98, and one staff PC. NT is running on 18 public PCs, and only one on Windows 95. So, our member libraries are running on fairly current PCs. Libraries tend to recycle older staff machines to public service or computer labs.

When asked to rank their level of satisfaction, on a scale of 4 (high) to 1 (low), with the number, age, and performance of their PCs, the response was a satisfaction level of 3.47 for staff PCs, and 3.05 with public PCs. One library commented that some of their public PCs were 5 years old, and another voiced that they had received complaints from the public about the age and performance of their PCs.

To participate in the Gates Sustainability Grant project, libraries had to write or update PC replacement policies.

TdS headquarters has eleven wireless desktop PCs (new in 2007 thanks to a Schmidt Foundation Grant). All lab and staff PCs are internet-accessible. The average age of the headquarters equipment is 3 to 5 years, which follows TdS policy.

## **Handhelds, tablet PCs, and other devices**

The libraries in the region have a variety of equipment. The list includes leap-pads, overhead projectors, LCD projectors, cassette players, CD recorders, VCRs, DVDs, ebook players, MP3 players, digital cameras, document scanners, fax machines, copiers, cable or satellite TV. At TdS headquarters, there is ITV equipment for use within the region. There are 59 receipt printers, 92 barcode scanners, and 95 CD/DVD-writers in the region. TdS just recently purchased new barcode scanners for Interlibrary Loan staff and Cataloging staff who have never had before.

See attached Tech Plan Survey Results for details.

New technologies and capabilities that libraries and their patrons are interested in include:

- Connecting PDAs and MP3 players to library PCs
- Digital scanning of photographs and documents

- Wireless
- Media Center technology
- More DVDs
- Blue ray technology
- Downloadable audio & video

## **Replacement Schedule**

Thirteen libraries indicated that they have a replacement plan for staff and public PCs. Of those, eight said that their plan includes a budget for the replacement. To participate in the Gates Sustainability Grant project in 2006, libraries had to write or update PC replacement policies.

TdS headquarters has a 3 to 5 year replacement schedule. Each year one to two new PCs are scheduled for replacement, for a staff of 8 full-time and 2 part-time employees. A grant allowed TdS to replace the PCs in the Computer Lab with 11 new wireless all-in-one PCs from Hewlett-Packard.

TdS recently upgraded the firewall. The new TdS firewall incorporates many desirable features including an 802.11b/g wireless access point with WPA and WEP security options. In addition the firewall, by default, places the wireless network on an entirely separate network segment from the rest of the LAN, thus protecting the primary network, while allowing less restrictive wireless access policies. Other new features include: Packet prioritizing, extensive VPN access for any remote staff, and many more log/monitor features than the previous TdS firewall.

TdS Technical Support continues to look at new options for security and anti-spyware software.

## **Tech Platform**

The TdS automation system runs on an Oracle database. TdS contracts for services with SirsiDynix and they provide extended server capacity. Sirsi Dynix staff handle all updates to the server software as well as the automation system software. This frees TdS from the necessity of evaluating the capacity of the server to handle automation system upgrades. TdS and member libraries always run the most current version of the software. Costs for this service are embedded in the contract TdS has with SirsiDynix.

The PCs throughout our region are Windows based. As noted in the section above, *Average Age of Equipment*, the majority of the PCs are Windows XP. Microsoft Vista is not being considered at this time, but will continually be reviewed until the need arrives to purchase before the beginning of 2008.

## **Tech Staff Support**

TdS employs one FTE automation coordinator and one FTE technician to provide support for the automation system, network coordination, and hardware support. In addition, staff assigned to cataloging and interlibrary loan also provide technical assistance and training to member libraries. Survey results showed, on a scale of 4 (high) to 1 (low), support for the automated system, coming from the TdS staff, was rated 3.81. Support for PCs, printers, etc. was rated 3.58.

TdS also coordinates group purchases of software licenses, for products such as Webroot's SpySweeper and Microsoft Office, as well as for PCs, receipt printers, and other hardware and software. One comment on the survey stated that it would be nice to have a schedule of purchase times and to allow more time for libraries to get approval from boards or cities. TdS will look at scheduling purchases of new PCs at least twice a year.

Libraries felt that TdS does a fairly good job of keeping them informed about essential system and network information with a survey ranking of 3.71 for essential automation info, and 3.38 for essential network and PC information.

**TECHNOLOGY INFRASTRUCTURE, MANAGEMENT AND SUPPORT QUESTIONS  
FOR PUBLIC LIBRARIES**

<b>QUESTION</b>	<b>RESPONSE</b>
What is your telecommunications/Internet connectivity capacity in your regional public library system or public library for Internet access and video connectivity?	TdS Office has two full T1 lines for 12 staff PCs, an 11 PC computer lab, and ITV capability. One projector in the computer room and one for loan to member libraries.
Do you have plans to expand this capacity within the next three to four years?	At this time, and for the next few years, two T1 lines are more than adequate.
If you plan to expand telecommunications capacity, what will be your anticipated capacity by the end of this planning period (July 1, 2011)?	N/A
What is your capacity to provide Internet-accessible computers to public library customers? What will this capacity be at the end of the planning cycle?	Eleven wireless desktop PCs (new in 2007) in the computer lab are available for public access through T1 lines.
What is your capacity to provide Internet-accessible computers for staff? What will this capacity be at the end of the planning cycle?	Twelve staff wireless PCs and three wireless staff laptops, have access through T1 lines. TdS may purchase upgraded PCs and laptops within the next few years.
What is the average age of computer equipment used for information resource access in your regional public library system or public library?	Three – five years.
What is schedule/timeline for your computer equipment replacement cycle?	3-5 years. One to two new PCs are budgeted each year for a staff of 8 full-time and 2 part-time.
What is your computer platform? PC-based, MacIntosh-based or both?	PC based.
How many technology support staff do you have to manage your technology infrastructure and network?	TdS has one FTE Automation Coordinator and 1 FTE Technician. TdS has a contract with SOCRATES for overall network management.
Is the technology support staff sufficient to the task of effectively managing your technology	No. Tech support staff could be onsite more often. More preventative maintenance could take place.

QUESTION	RESPONSE
infrastructure and network? If not, what staff capacity do you think you need?	
Is assistive technology for customers with special needs provided and supported in your public library?	A few public libraries do have assistive technology software and hardware for customers. TdS does not have dollars or staffing to support in any way.
Are technology support staff provided with the necessary training they need, including training associated with assistive technology?	<p>No training with assistive technology has been done or sought out. TdS Technical Support staff could use more training and involvement with others working in the same capacity.</p> <p>Cross-training is needed but do not have additional staffing or staff hours to do the cross-training.</p>
How and when are technology support staff provided with training?	When opportunities are available.
What particular challenges does your regional public library system or public library face in providing sufficient access and technology resources to your customers and staff?	Funding continues to be an ongoing challenge for TdS and member libraries. Trained staff at all levels could be enhanced for working with enhance services if funding allowed.

## **VI. Staff development and training**

The *TdS Strategic Plan 2007-2010* addresses the need for staff development and training in several of its objectives and strategies. TdS hopes to do a bi-annual survey to determine the needs, services, and training (Objective 2.a.). To identify the strengths and talents of our member libraries, TdS will also be working with members on an inventory of skills and best practices (Objectives 4.a. and 4.b). This expertise will be shared among our libraries. No doubt many of these skills and best practices will relate to use of technology in libraries. TdS wants to use technology to enhance staff efficiency, and will encourage this by offering informational workshops on emerging technologies (Objective 8. b.), as well as training on the use of the automation system. TdS will inform and promote state-wide continuing education opportunities (Objective 10. c.)

Professional development and training for TdS staff needs to be enhanced and opportunities sought. The libraries look to the regional staff to research and implement new technologies. TdS recently upgraded a computer lab with eleven new PCs for training opportunities for all library staff within the region.

Technology based training opportunities already set up for 2007 include web page design and Sirsi Reports & Statistics as well as ongoing regional automation system training. TdS will encourage participation in the Minnesota Voluntary Certification Spring 2007 Program entitled Tech Expectations. TdS hosts biannual Circulation User's Group meetings in the Spring and Fall to keep library staff current with regional automation system issues and updates, discuss needed training, and offering a time for sharing.

The survey indicates a satisfaction level of 3.28 (on a scale of 4-high to 1-low) with training opportunities for the automated library system, and 3.16 for internet searching, ELM databases, etc. Satisfaction levels were lower for basic computer skill applications (2.58) and webpage design and development (1.87). The survey shows a generally low level of confidence in member library staff's understanding of basic PC functions (updating Windows, virus checks, etc.) and their ability to trouble-shoot or maintain peripheral devices.

Comments from the survey show a strong interest in webpage development and design. The survey also shows that knowing about and paying for new technology, as well as training staff for that technology, is challenging. Member libraries look to TdS to provide the information and training to keep abreast of technological developments.

## VII. Budget

A secure, stable funding stream is essential for continuation of our current technology applications, for the underlying network infrastructure, and knowledgeable staff to support the technology. The *TdS Strategic Plan 2007-2010* has specific financial goals, as summarized below.

- Advocate for funding increases at the state level and for adequate support for member libraries at the city and county level by encouraging attendance at Legislative Day and increased attendance at statewide and regional legislative activities, and engaging the public in support of libraries (Objectives 5.a., 5.b.). The comments from the Tech Plan Survey show continuing concerns with financial challenges—both to secure adequate staff and to balance technology demands with traditional library services.
- Develop diversified funding streams by exploring alternative funding sources (grants, sharing of space, etc.) (Objective 6.a.).
- Assure funding from member libraries by the development of a sustainable fee structure for essential services and a five-year financial plan (Objectives 7.a. and 7.b.).

In 2008, TdS will spend approximately \$555,250 on regional automation services, including the contract with SirsiDynix. This is about 50% of the overall TdS general budget TdS is committed to meeting the technology needs of member libraries and their patrons/customers.

See attached budget for ongoing technology expense which include the following areas:

- Technology Staff
- Purchased Technology Services
- Communications (telephone and Internet access)
- Computer and System Services
- Workshops and Conferences
- Purchased Technology Services
- Hardware and Software and Supplies
- Maintenance

TdS will look at outside funding sources to accommodate any special requests that may need to be addressed. TdS will work with Project SOCRATES on e-rate applications for telecommunications services.

**BUDGET TEMPLATE FOR PUBLIC LIBRARIES – TdS is on calendar year budget, so figures are for Jan. – Dec.**

<b>CATEGORY</b>	<b>ITEM(S) DESCRIPTION</b>	<b>FY2008 BUDGET</b>	<b>FY2009 BUDGET</b>	<b>FY2010 BUDGET</b>	<b>FY2011 BUDGET</b>
<b>Salaries and Wages for Technology Staff</b>	<b>Automation Coordinator, Computer Technician, 2.5 Cataloging Staff + temp. pt. help (Jan. – August)</b>	<b>\$160,581</b>	<b>\$167,004</b>	<b>\$173,684</b>	<b>\$180,632</b>
<b>Fringe Benefits for Technology Staff</b>	<b>SS/Medicare, PERA, Health/Life Insurance &amp; MSA participation fees</b>	<b>\$41,800</b>	<b>\$43,890</b>	<b>\$46,084</b>	<b>\$48,389</b>
<b>Purchased Technology Services</b>	<b>See Computer and System Services below.</b>				
<b>Consultant Services</b>					
<b>Communications (telephone, Internet access)</b>	<b>Office Telephone Service - \$3,500 Regional Network Costs - \$150,000</b>	<b>\$153,500</b>	<b>\$159,640</b>	<b>\$166,025</b>	<b>\$172,666</b>
<b>Computer and System Services</b>	<b>OCLC - \$16,000 Sirsi Contract – \$155,020 NCIP - \$2,000 LTI (Authority Control) - \$5,545</b>	<b>\$178,565</b>	<b>\$185,708</b>	<b>\$193,136</b>	<b>\$200,861</b>
<b>Technology Staff Development</b>	<b>Travel to workshops, meetings and conferences</b>	<b>\$3,500</b>	<b>\$3,640</b>	<b>\$3,785</b>	<b>\$3,936</b>
<b>Technology Workshops and Conferences</b>	<b>SOCRATES provided workshops, meetings and conferences</b>				
<b>Technology Leases and Rentals</b>	<b>N/A</b>				
<b>Purchased Technology Services (i.e. maintenance)</b>	<b>SOCRATES Participation/Management Fee</b>	<b>\$16,920</b>	<b>\$17,597</b>	<b>\$18,301</b>	<b>\$19,033</b>
<b>Supplies and Materials (computer software, etc. both instructional and non-instructional)</b>	<b>Basic supplies</b>	<b>\$400</b>	<b>\$416</b>	<b>\$433</b>	<b>\$450</b>
<b>Capital Expenditures (technology equipment)</b>	<b>Early 2007 spent \$20,000 on upgrading all computer lab PCs, firewall, barcode scanners for cataloging and ILL staff</b>				
<b>Other Expenditures (list)</b>	<b>Enhancements to regional automation system</b>		<b>Est. \$50,000---</b>	<b>-----</b>	<b>-----</b>

## VIII. Implementation Tasks & Timelines

Goals listed below are taken from the *TdS Strategic Plan 2007-2010*. Points under each goal will describe a technology objective that will further the goals, objectives or strategies of the Strategic Plan.

**Goal: Assure strong cooperation and communication across the system**

**Objective: Develop and assure effective communication protocols and methods.**

Strategy	Measure/Evaluation	Time
Develop and assure effective communications protocols and methods that are in place that are consistent and have easy accessibility.	Level of satisfaction with effective communication.	Ongoing
Use of a Blog to facilitate communication among member libraries.	At least 5 member libraries posting directly to the TdS Blog. Also, surveying member libraries to see if they read the Blog.	Ongoing
ADA compliant library webpages	TdS homepage compliant with at least Priority 1 of an accessibility testing tool such as <i>Bobby</i> . Surveying member libraries about their webpage compliance.	

Other possible technology areas to improve communications or enhance access:

- Investigate implementation of Voice over IP
- Investigate email software options.
- Evaluate use of VNC for remote maintenance access to PCs.
- Investigation and implementation of an internal website search software.

**Goal: Assure a strong financial future**

*Objective: Explore alternative funding sources.*

Strategy	Measure/Evaluation	Time
Write grants to underwrite the cost of new electronic databases, such as Chilton's, Ancestry, or Novel-List.	Funding obtained for the additional one new database.	Ongoing
TdS staff person assigned to write grants to assist in the implementation of new services and technologies.	Successfully funding two or more programs related to new services and/or technologies.	Ongoing

**Goal: Explore and utilize emerging technologies**

*Objective: Use technology to enhance staff efficiency*

Strategy	Measure/Evaluation	Time
Develop and implement a plan that takes advantage of what Sirsi/Dynix has to offer	Implementation of additional Sirsi features – Pocket Circ for Inventory and remote circulation	Summer 2007
Offer staff training opportunities that will inform member libraries of emerging technologies	Offering training and workshops – monthly or every other month	Ongoing

Other:

- ADA compliant webpages
- System Security
- Implement Sirsi Acquisitions

**Goal: Explore and utilize emerging technologies**

*Objective: Enhance access to information sources*

Strategy	Measure/Evaluation	Time
Preview and explore affordability of increased formats, wireless opportunities, and on-line information sources	The number of libraries implementing increased formats, wireless opportunities, and/or new online information sources.	Ongoing
Update TdS Technology Plan	Ongoing evaluation and review of plan	April 2007
Attain public feedback regarding use of online resources	Public awareness and overall satisfaction with useability of online resources v	Ongoing

Other:

Additional online databases (ex. Chilton's Ancestry, Novelist)  
 Additional Staff and patron training

**Goal: Broaden services to member libraries**

***Objective: Increase TdS and member library capacity and capability***

Strategy	Measure/Evaluation	Time
Automated Inventory – Pocket Circ	Purchase Pocket Circ and scanner device for inventory and remote circulation	Summer 2007
Investigate the application of new technology for the delivery of training.	Recommendation to automation committee on the feasibility of using Captioate, or similar software for creation of training modules.	Summer 2008
Provide technical training and assistance for library webpage development.	90% of member libraries will have a web presence.	Spring 2007

**Other:**

Seek out other new Sirsi product information

# **IX. Evaluation**

## **Summary of results 2004-2007**

The assessment of the Traverse des Sioux Library System (TdS) Technology Plan 2004-2007 was done by Jeanne DeMars and Patty Biesterfeld.

### **Access**

The objectives listed in the 2004-2007 Technology Plan Implementation plan were almost entirely met, with the exception of written instructions for the public for Zportal and iBistro.

- Zportal connectivity with Unicorn.
- Training for Zportal. Held several staff training sessions for Zportal searching, as well as ELM databases. (We didn't provide written material for public instruction.) The survey indicates a satisfaction level of 3.16 (4-high to 1-low) on training opportunities for internet searching, ELM, etc.
- Trained member libraries in the use of the new system. We provided numerous workshops, user group meetings, and written procedures for all member libraries. (We did not assist with writing materials for public instruction but we did have members share) The survey indicates a satisfaction level of 3.28 for automation.
- Implementation of SIP2, and implementing NCIP (currently test phase)
- Implementation of VDX software for TdS ILL staff. This also required working out new ILL procedures within the region, using the capabilities of our new system as well as the VDX software.
- Installation of firewalls (CIPA compliance) and local system security. Further training needs to be done with staff in order to maintain virus software, operating system software, etc.
- Switched to new network (Hickory Tech to Onvoy) through Project Socrates. This greatly increased network capacity.
- 100% compliance with CIPA through use of firewalls with filtering capability. Only about 55% have actual written policies on data privacy and ADA compliance.

### **Automation**

The objectives listed in the 2004-2007 Technology Plan Implementation plan were achieved; all tasks accomplished.

- Selection of and migration to a new system. The process to select a new system was inclusive, with full participation of every library in the region. We selected Sirsi's Unicorn system, which was implemented in May 2005.
- The survey indicates a satisfaction level of 3.47 (4-high to 1-low) with the OPAC ("iBistro"), 3.02 for staff client ("WorkFlows"), and 2.83 for the statistical and reporting capabilities of the system.
- TdS provides telephone and on-site support. We also have a monthly newsletter, a Blog, frequent emails, and training documents (available online) to support the system.
- Shortly after migration, one member library chose not to continue to participate in our shared automation system, but rather to run their own independent Sirsi Unicorn system.

### **Resource Sharing**

The objectives were not fully achieved, as indicated below. We need to continue to work toward ADA compliant webpages.

- The survey indicates a satisfaction level of 3.39 (4-high to 1-low) with access to the ELM databases, but only 2.9 with other databases. One library indicated they use free databases as found on the internet.

- TdS did not document stats of e-book usage in the region.
- TdS did not work enough with member libraries to ensure ADA compliant library web pages.

### **Technical services**

The objectives were achieved, with work continuing on funding for services.

- Pre-migration work on part of libraries was excellent. Libraries inventoried, weeded, discarded, cooperated on reduced number of circ policies and met deadlines for mapping and verifying info.
- A new model for tech services was created - sending first copy of title only in for TdS Cataloging. Internally, new method for loading bib records, creating call numbers, etc.
- Libraries were no longer charged separately for each title cataloged. Cataloging costs were rolled into the automation budget. Work continues on funding formulas for services.

### **Training**

The objectives were mostly achieved with the exceptions noted in the last two bulleted points. Our focus was clearly on the migration to a new automation system and connectivity with MnLINK (Zportal and ELM).

- Lots of documents on new system procedures were created—all kept up to date on web.
- During the 2004-2006 time period, TdS staff and member library staff attended many automated system vendor demonstrations and Sirsi and TdS sponsored training workshops to prepare for the migration and implementation of a new automation system.
- Ongoing circulation user group meetings are scheduled twice a year.
- TdS determined there was an unexpected need to purchase the Sirsi serials control module, which required additional training and support.
- MINITEX ELM workshops were held within the region
- Other MINITEX training and webinars were attended by ILL and Cataloging staff.
- Staff had the opportunity to attend other workshops in the region and state in various regarding technology topics.
- Workshop on how to access the resources and training available on WebJunction.
- TdS did not provide training on wireless networking, MP3 files, ITV, PDAs and ebook access, or webcasting. However, TdS did assist two libraries who received grants for downloadable audio books.
- TdS did not schedule specific, direct training sessions on Internet searching, Microsoft Office software, copyright, privacy issues, or ADA compliance, but Technical Support assists member libraries when onsite. TdS provides member libraries with access and information to resources to assist them with any topic necessary.

### **Funding**

- To migrate and implement a new regional automation system, TdS had to choose an affordable system and use existing dollars rather than request additional funds from cities and counties.
- TdS and member libraries spent approximately \$382,000 for conversion and migration and first year Sirsi costs for new system. Other operating costs including staffing, etc. were approximately \$275,000. \$132,000 of the total amount was taken out of a shared automation reserve fund and the rest of the costs were billed to member libraries and TdS.
- In 2004 and 2005, there were biannual deposits into the Automation Reserve Account.
- In 2006, member libraries were able to participate in the Gates Staying Connected Grant Program. Thirty-seven new public PCs were ordered with libraries paying only 1/3 of the cost. Due to the reduced rate of a large PC order, 17 other PCs were ordered for staff use.
- To participate in the Gates Staying Connected Grant, libraries were obligated to write a replacement plan for public PCs.
- During the summer of 2006, TdS worked with Project SOCRATES to seek out the most cost-effective vendor for Internet access within the region. Out of the four vendors responding to the telecomm RFP, Onvoy was chosen for a number of reasons, but specifically for their

presence in the statewide telecommunications infrastructure, flexibility, depth of service and support staff for greater reliability, “next generation” services, value added services, and of course, overall increased bandwidth for less cost.

- TdS worked with Project SOCRATES to determine the best Internet access for libraries. Some member libraries have DSL lines and some share LADS lines with the school in the same community.
- During 2006, TdS hired a consultant to assist in the development of an equitable, sustainable fee structure for costs of services provided to member libraries.

### **Summary**

We made significant progress in technology over the course of the 2004-2007 plan. It was a major event to migrate to a new automation system, to train and implement the system, to become participants in the MnLINK gateway, to learn new ILL software, to develop new interlibrary loan procedures, to switch network providers, and to upgrade PCs.

## **Evaluation Strategy 2008-2010**

The TdS Technology Plan, 2008-2010 and the TdS Strategic Plan 2007-2010, will help lead TdS into the future. Both Plans will be reviewed regularly and it should be noted that revision may be necessary to assure that TdS best meets the needs of clientele – the TdS member libraries and their customers who they serve directly.

The members of the TdS Automation Committee, TdS staff, and Tds Board of Directors will review the technology plan on an annual basis. The measure and/or evaluation strategy is included with each technology objective listed in Section VIII, Implementation Tasks & Timelines.

## **Official Submission Certification**

This 2008-2011 Technology Plan is the official submission of:

Traverse des Sioux Regional Library System

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(Signatory: Roxann Wellman, Board Chair)

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(Signatory: Patty Biesterfeld, Acting Director)

Date approved \_\_\_\_\_

*Attachments: Traverse des Sioux Strategic Plan, 2007-2010  
Traverse des Sioux 2006/2007 Technology Plan Survey Results*