Technology Planning

This is a guide to creating a technology plan. This was originally a handout from a workshop on Technology Planning. For additional technology planning assistance, please contact Bobbi Lee Slossar at the New Hampshire State Library (bobbilee.slossar@dcr.nh.gov).

Steps of a Technology Plan:

- Why develop a tech plan?
- Preliminary planning
- Necessary parts of a tech plan
- Mission statement/Introduction
- Technology goals and objectives
- An introduction to TechAtlas
- The technology inventory
- Budget planning
- The evaluation process

What is a Technology Plan?

- An overview of your current technology
- A blueprint for how technology assists the library in meeting its mission

Why should you create a technology plan?

A technology plan is not simply a plan for what technology should be purchased and when it should be upgraded. It is a mechanism to help prioritize and budget for the technology tools that are most important for achieving organizational goals. By starting with an organization's mission and priorities, a technology plan helps to clarify where opportunities exist to improve infrastructure or deliver services in a new way (Reference: TechSoup).

A good technology plan will also allow you to substantiate your computer budget requests, verify your in-kind grant contributions, and are oftentimes necessary when applying for technology-related grants.

Preliminary Planning

A technology plan must take the following into consideration:

- The library's mission statement
- The library's vision statement concerning technology
- The technology needs of the community
- The library's long range plans

Technology Planning Committee:

Don't try to write the plan on your own! Involve library trustees, staff, and a few members of the general public in writing the technology plan.

Staying current with new technologies:

- It is important to know what new technologies are available in the library world.
- Equally important to stay current with technology trends in general.
- Sometimes knowing about new technologies can actually save you money!
- It is not realistic to expect to purchase all of the newest technologies.
- Decide which technologies fit your library's goals and your community's needs.

Ways to stay current with technology trends:

- Read the monthly issues of Computers in Libraries via Ebsco.
- Subscribe to general technology blogs, like TechCrunch.
- Talk to other librarians about technology.
- Attend technology workshops!

Necessary components of a technology plan

(As described in *Writing a Technology Plan: Assistance for NH Libraries*)

The plan must:

1. **Establish clear goals** and a realistic strategy for using information technology and telecommunications to improve library services.

   If this first requirement has you stumped, review the sample goals and other technology plans to get some ideas. Don't overlook some of the most basic technology needs: Computer training, providing electronic resources and the necessary instructions, having adequate computers and accessories, etc.

2. **Include a professional development strategy** to ensure that library staff knows how to use these new technologies to improve library services.

   One of the most important things you can do is integrate staff training into each and every goal. Your staff members are your most important technology resource; make sure that you provide for staff training every step of the way.

3. **Include an inventory** and assessment of the information technology and telecommunications services that are **needed to improve library services**.

   Consider using the Tech Atlas tool to inventory computers, peripherals, telephones, databases, etc.

4. **Provide for a sufficient budget** and implementation process to acquire and maintain the hardware, software, professional development, and other services that are needed to implement the strategy.

   Again, consider using the Tech Atlas tool to build the budget.

5. Include an **evaluation process** that enables the library to monitor progress toward the specified goals and make midcourse corrections in response to new developments and opportunities as they arise.

   Some people find it easier to build the evaluation for each goal into the goal objectives and strategies. You'll see examples of this in an upcoming section of this handout.

Writing the Plan: Introduction & Mission Statement

Technology plans typically begin with an introduction to the plan and the library's mission, vision (if available), and technology statements (again, if available). Does your library have a mission statement? If not, this should be your first step in the process of writing your technology plan.

Mission statement:

Aim for one – no more than three – short sentences. Saying more with less should be your goal.

The mission of the **Evanston Public Library** is to promote the development of independent, self-confident, and literate citizens through the provision of open access to cultural, intellectual, and informational resources.
-Evanston Public Library, 703 Orrington Avenue, Evanston, Illinois 60201, http://www.epl.org:80/library/library.html

Introduction:

Many technology plans begin with an introduction that includes the library's mission statement, and oftentimes a vision statement.

Library Mission Statement

The Kilbourn Public Library (KPL) serves the needs of the community. It serves a diverse group of residents and visitors, in addition to cooperating libraries. The library provides a place and a variety of resources to meet patron information, education, recreation, communication, and cultural needs. The library provides materials in print, audio, video, and other electronic formats for circulation and reference use. KPL staff is available to assist patrons in meeting their needs.

Statement of the purpose of technology at the Kilbourn Public Library

Technology is used to enhance communication, assist patrons, deliver library services, and manage the library.

Introduction

KPL is committed to providing technologies for its users. The staff are advocates for information literacy. At our library, technology is at the very core of our services. This technology plan will be revised every three years or as needed.

http://www.dellslibrary.org/techplan.html

Library goals, objectives, and strategies

A major component of your technology plan will be outlining the technology-related goals of your library. Remember, your technology plan is based on how technology supports your library services to the patrons.

Goals:
Goals are broadly written.

Example: **To provide training opportunities to enhance services provided to library users.**

Objectives:
The objectives are written more specifically, and directly support the overall goal.

Example: **Develop and implement a training program for library users**

Strategies:
Strategies are very specific statements. These are exact actions that the librarians will take to implement the broader objectives and goals.

Example: **Schedule patron training in the following areas: basic computer skills, Internet searching, email, using the OPAC**

An evaluation, or a way to measure the success of the objective, is often included within the strategies.

Example: **Distribute evaluations at all sessions to determine future training opportunities**

Let's see the entire goal with its objectives and strategies on the following page…

Sample goal, objectives, strategies, and evaluations

GOAL:
To provide training opportunities to enhance services provided to library users.

Objectives:
Utilize and improve technology provided to library staff

- Create, distribute and evaluate staff technology survey annually
- Schedule more staff training in the following areas: web searching, word processing, creating publications, Horizon software
- Analyze and evaluate current staff training program

Strategies

Evaluation

Maintain a vigilant approach to meet the needs and requirements of staff.

- Work with departments heads to pinpoint training needs of staff
- Work with department heads to ensure staff goals are met in accordance with library goals
- Make sure all staff have sufficient training on new Horizon product and feel comfortable using it

Develop and implement a training program for library users

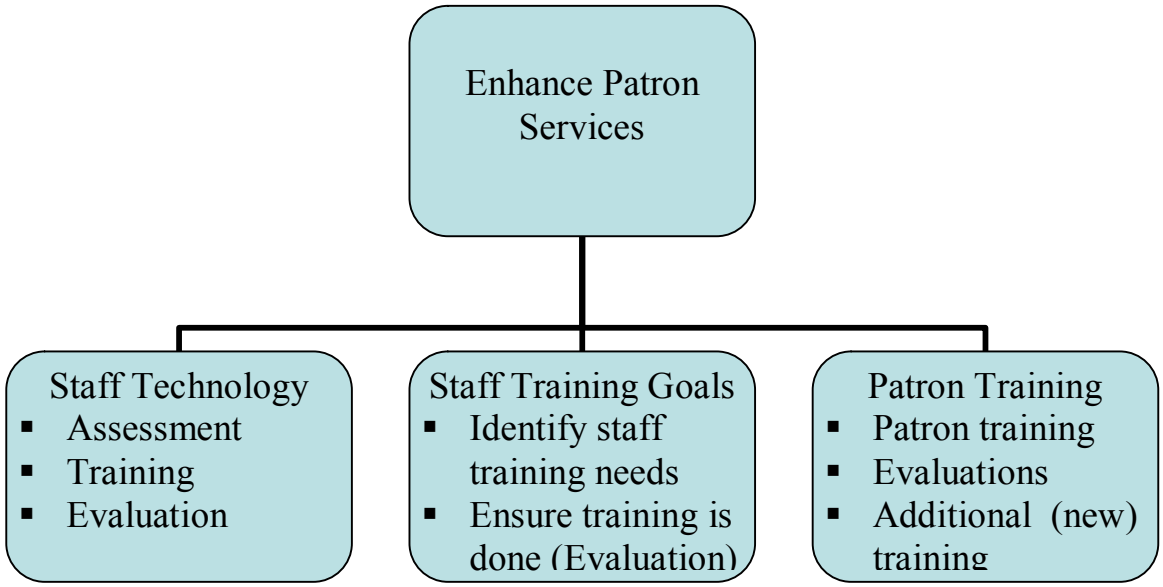
- Schedule patron training in the following areas: basic computer skills, Internet searching, email, using the OPAC
- Distribute evaluations at all sessions to determine future training opportunities
- Implement new training opportunities as requested and if feasible
- Investigate the possibilities of holding patron trainings outside the library

Why does this goal fit the needs of a technology plan?

- Although the goal is to meet the needs of the library user, it recognizes that **staff members need to be trained** to assist the user with technology.
- It **assesses** staff ability with regards to technology.
- Provides for **staff training**.
- It works to **meet staff training goals**.
- Provides ways to **evaluate** the specific strategies.

Examining the goal

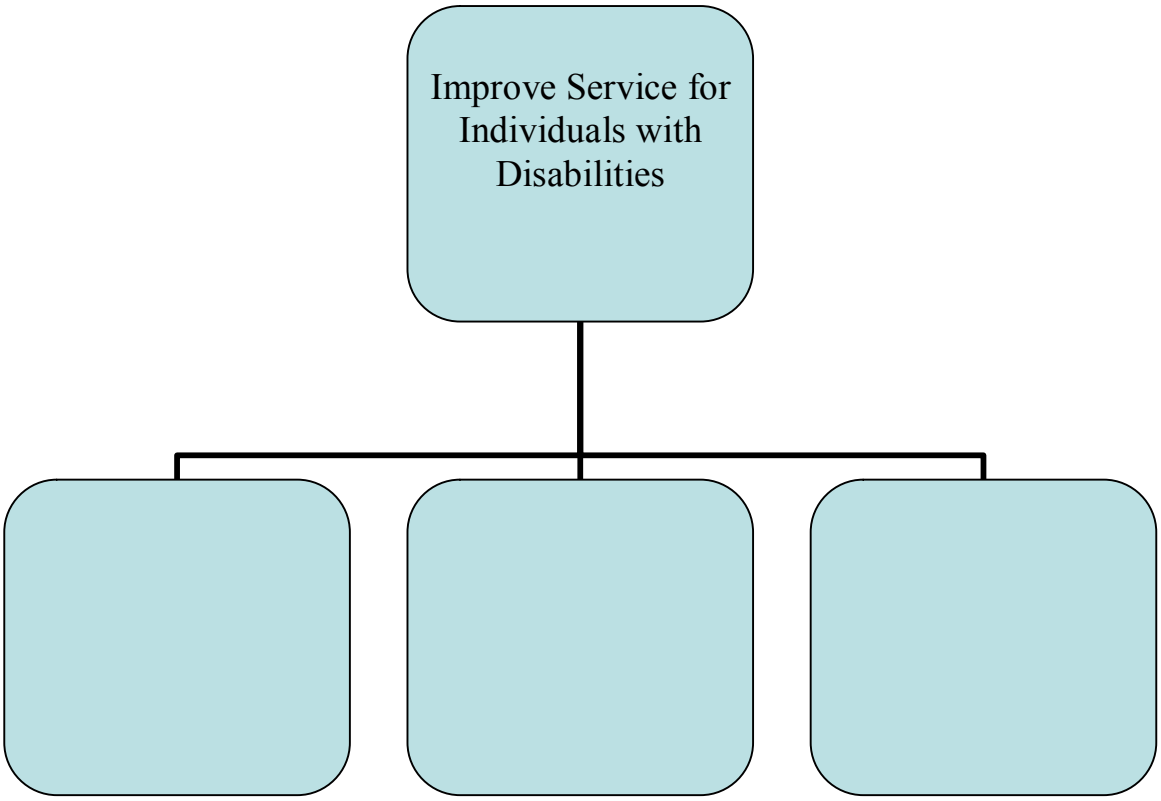
Sometimes it is easier to grasp writing a goal without having to think in complete "tech planning-ready" sentences…



http://winslo.state.oh.us/publib/techplan.html

Hands-on Assignment:

Develop a goal, objectives and strategies to improve technology-related services to individuals in your community with disabilities.



Goal: _____

_____

Objectives:

1. _____

   _____

   - _____
   - _____
   - _____

2. _____

_____

- _____
- _____

3. _____

_____

- _____
- _____

Additional Notes:

Using TechAtlas

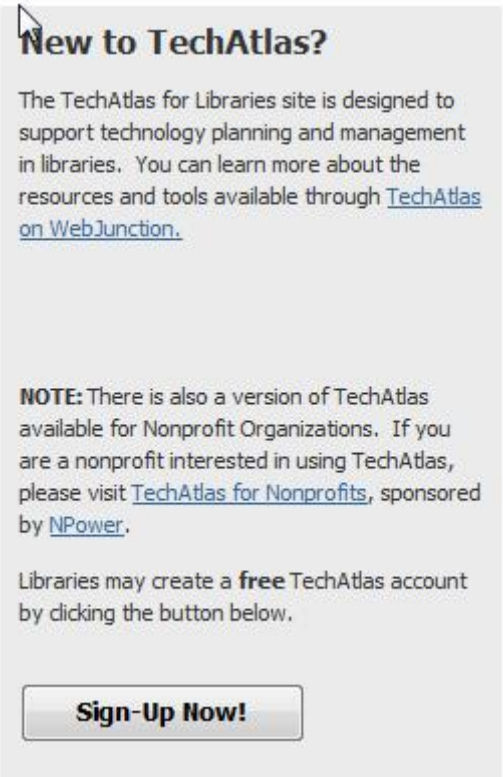
- Through our membership with WebJunction, we have access to TechAtlas, a program designed to help non-profit organizations create technology plans.

- TechAtlas is a type of "wizard" that helps you complete the necessary parts of a tech plan.

- Although TechAtlas provides some pre-made goals and objectives, **you are encouraged to write your own.** You can take the time to add them to the TechAtlas wizard or simply keep them separate and merge the two documents at a later time.

- Using Internet Explorer only, direct your browsers to: http://webjunction.techatlas.org

Sign up for a new account, if necessary.



TechAtlas provides assistance in all of the major components of a technology plan:

Envision:

Notice that TechAtlas allows you to assemble your tech team, add your existing mission and vision statements, and select from a number of generic goals and objectives – as well as add your own to the plan. It is recommended that you write your own objectives, strategies and evaluations and add them to Tech Atlas instead of using the ones provided. You have the option of adding this information to TechAtlas or simply merging this information with the report generated by TechAtlas at a later time – just be sure to include all of the information found under this "Envision" section in your report.

Survey:

TechAtlas has a few ready-made technology surveys that you can send to your staff members in order to assess their current technology skills. This is an optional step in writing a technology plan; however, it might be very useful for the technology planning committee to know the computer needs of the staff members and to use this information to develop future staff training.

Inventory:

Using the provided inventory tool can save you a lot of time! If you only have a few computers in the library, the inventory tool can be run independently on each computer (instructions are provided in this handout). If you have a large network, consider running the inventory tool over the server to gather the information for all of the computers at once.

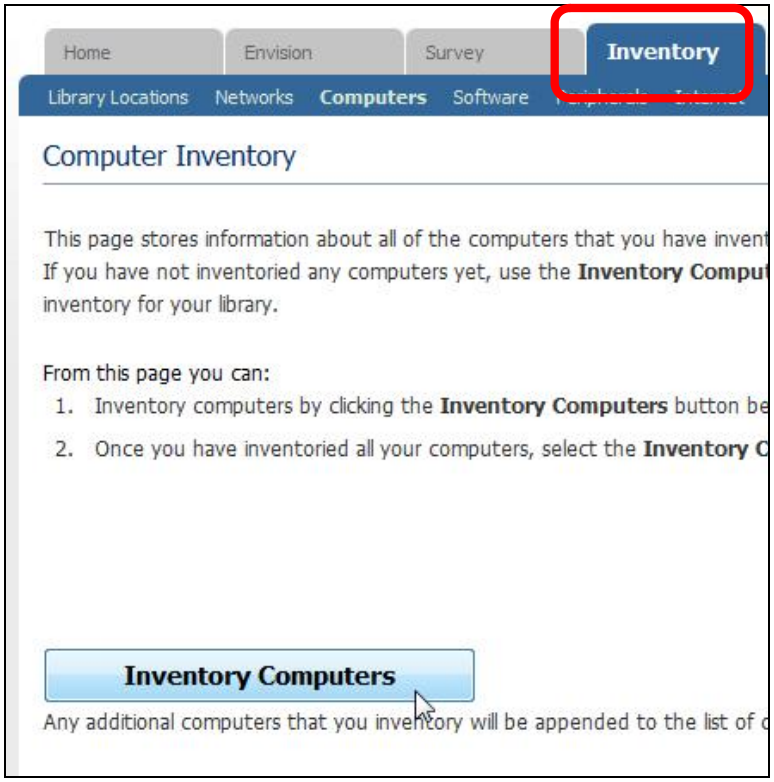
Budget:

Create a customized budget. Set up the budget in a manner that best fits your specific budget. Don't try to overwork your budget to fit the needs of the TechAtlas program.

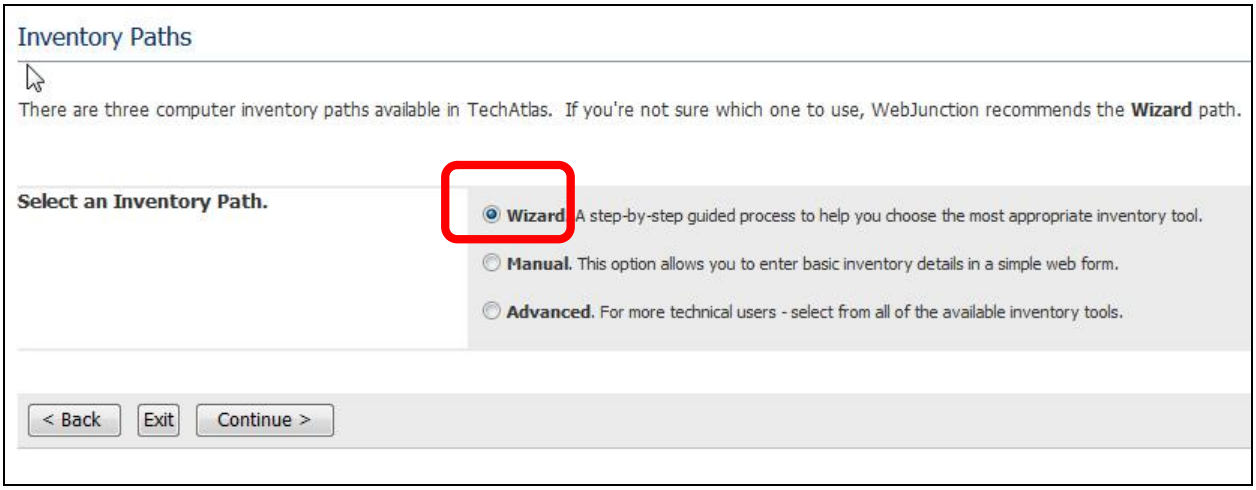
Evaluate:

Include evaluation measures to your technology plan. TechAtlas has this as a separate part of the technology plan, but you might be more comfortable including the evaluation strategies in your technology goals and objectives.

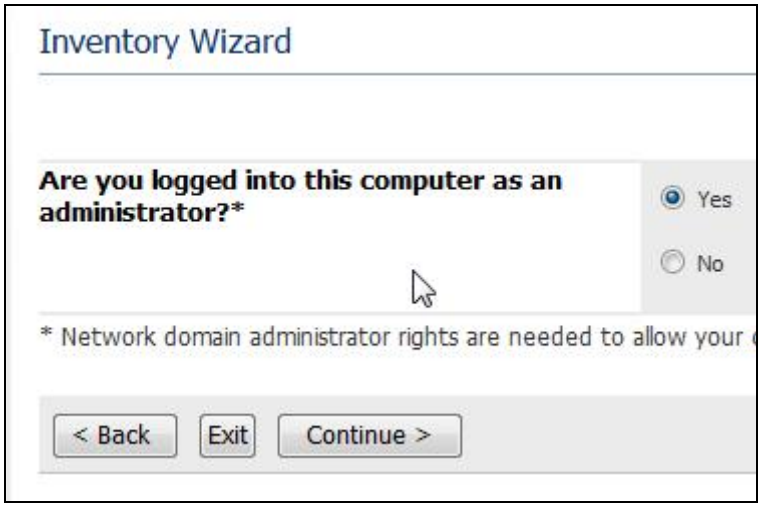
Running an inventory on a single computer



Choose the Wizard for an automatic inventory of your computer.



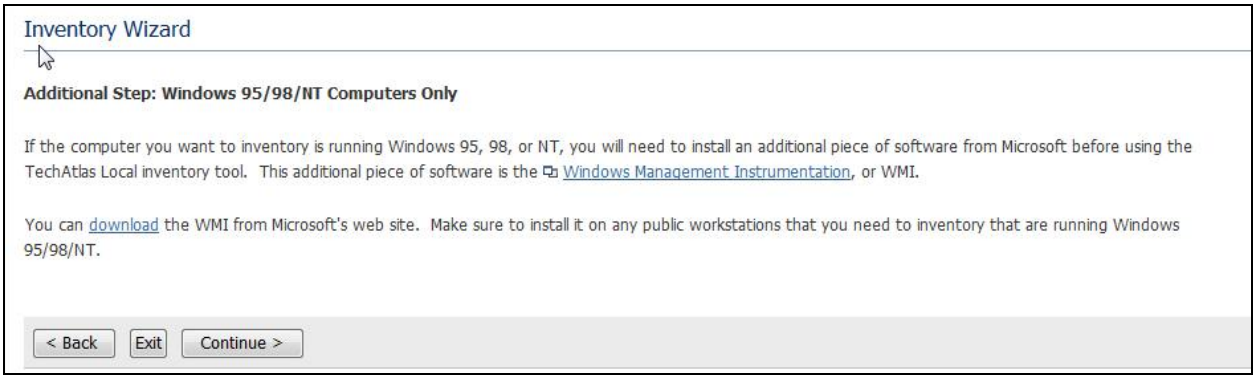
You'll need admin rights to the computer.



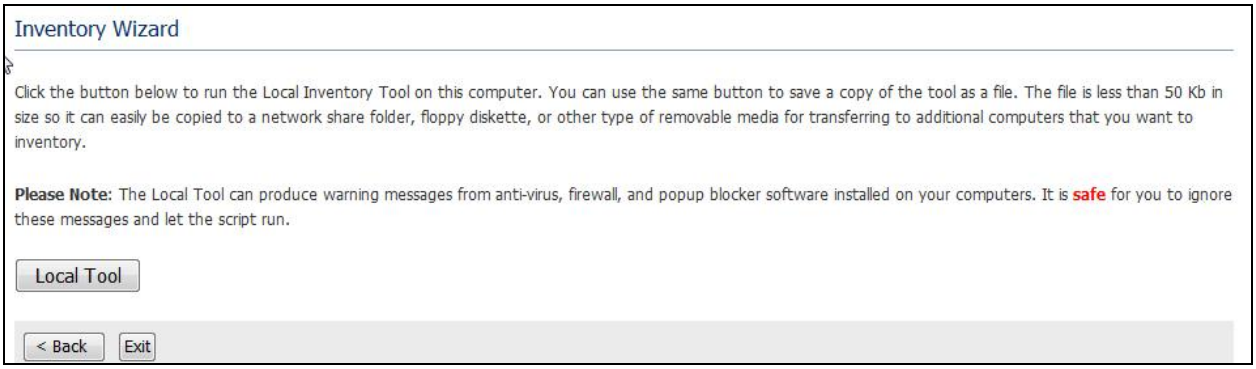
If you aren't inventorying your server, choose "no."

Select the Local Inventory Tool (Script).

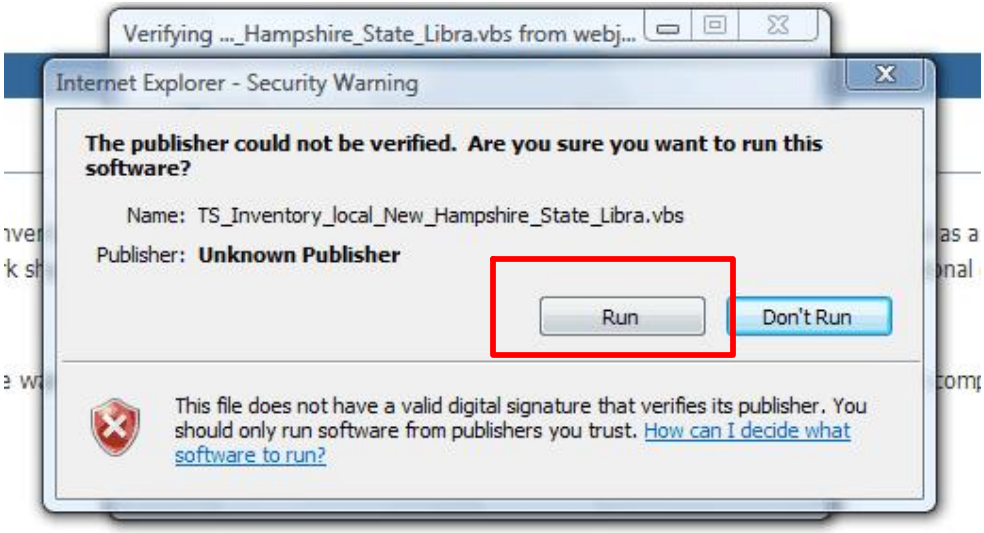
If you are using XP or Vista, there is nothing additional to install.



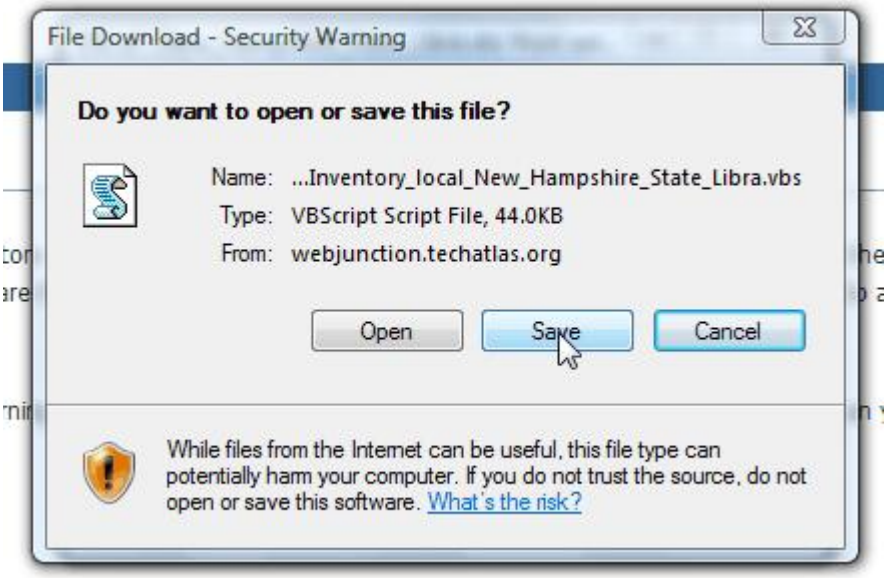
This notifies you that it is safe to ignore the warning that will pop up on your screen.



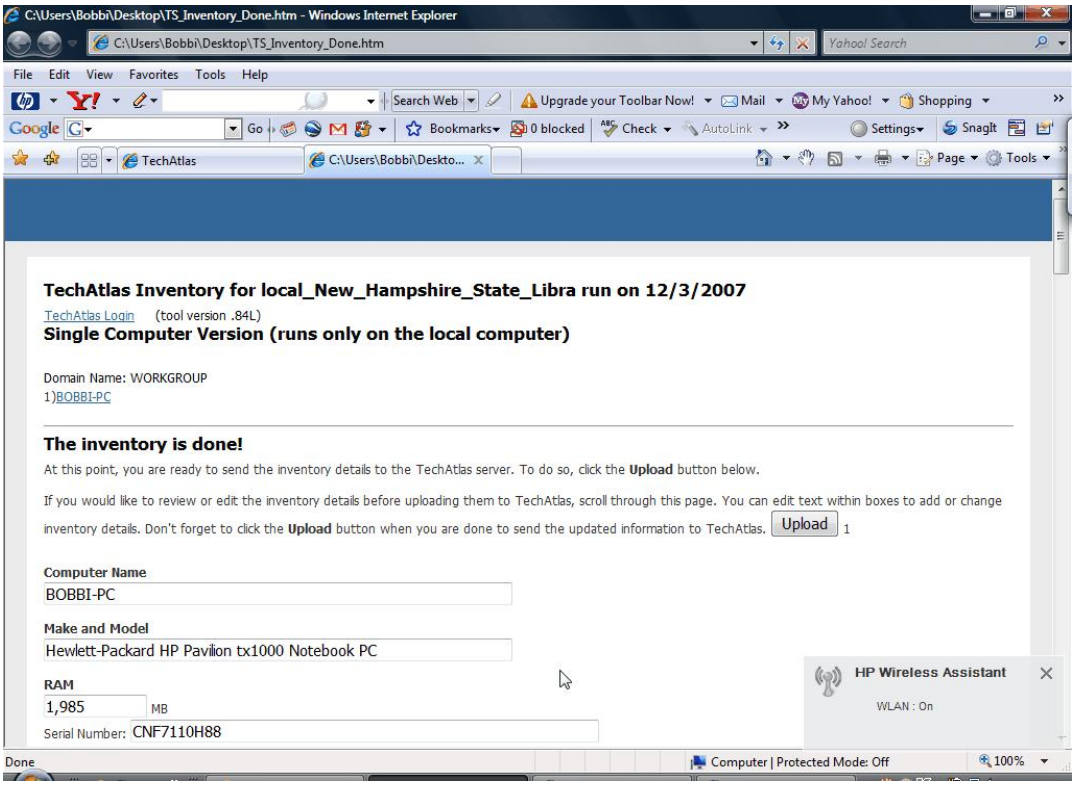
Ignore the warning, and select "run."



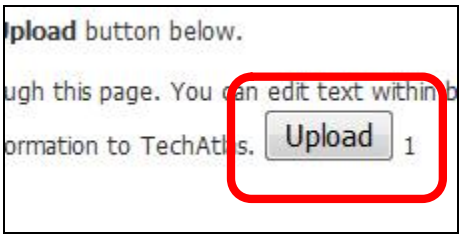
Save the file to your desktop.



The final report.

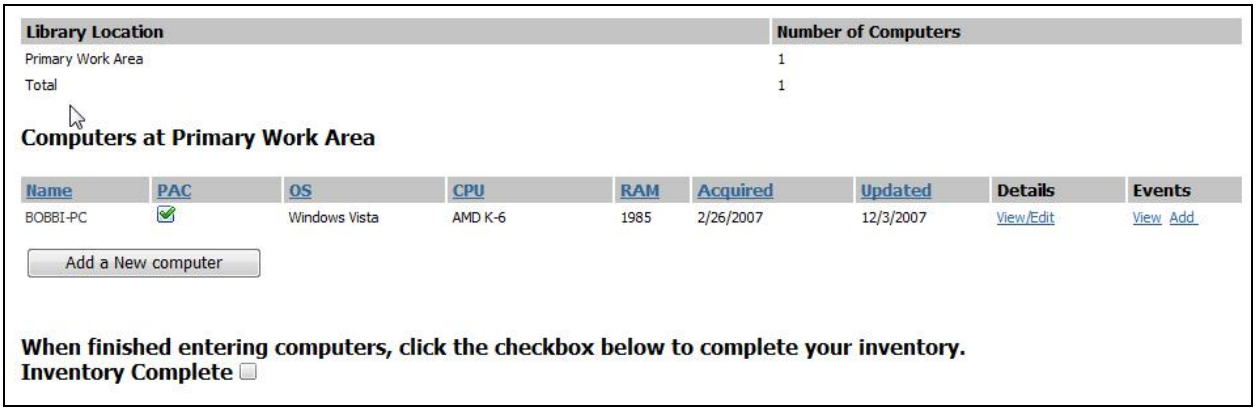


Click on the "Upload" button to send your inventory to TechAtlas.



Success!

Click on **View/Edit** under the Details column to see the specifics about your computer.



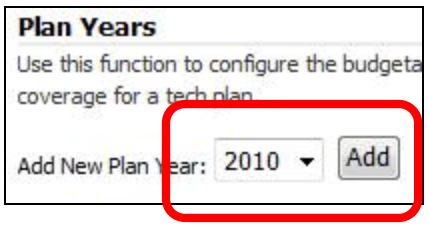
The inventory is complete! If you are running the inventory separately on a few computers, log onto another computer, click on "Add a New Computer" and run the script on each computer.

Using the budget tool

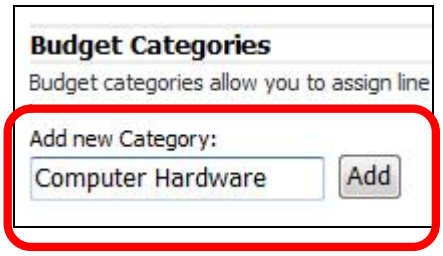
Let's start with the budget set-up…

Start with determining if you want to set up your budget by activity or objective level. *Hint: Objective level is less specific than activity level budgeting. However, for this exercise, let's select "activity" level.*

Let's add the appropriate years for our plan. Remember, a technology plan typically spans three years.



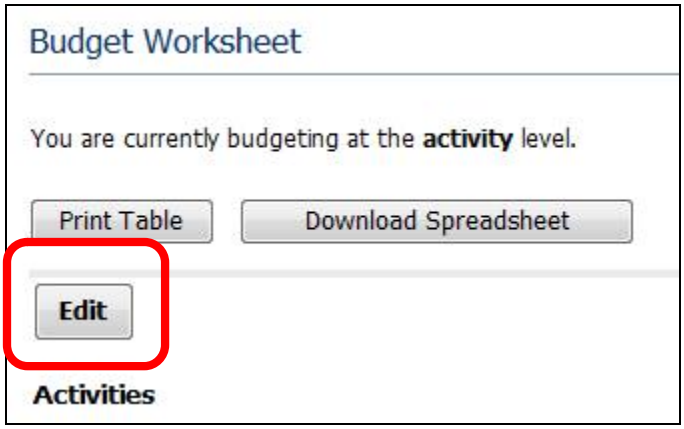
Add some budget categories that will match your line items.



Add your funding source(s).

Click on the "Worksheet" submenu:

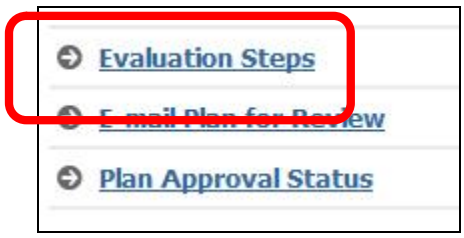
Edit your budget page to enter budget amounts.



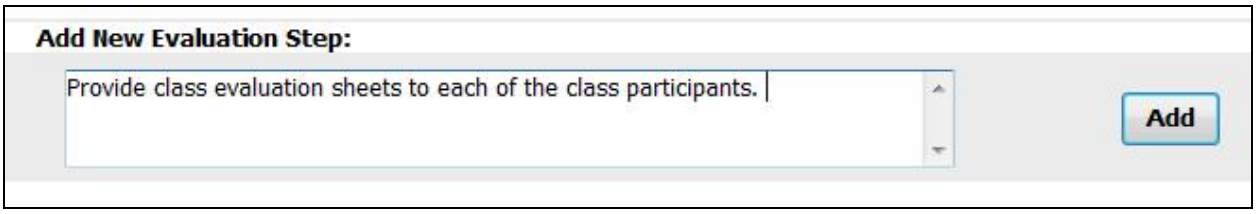
Entering your evaluation criteria

You have the option of including evaluation criteria separately or within the goals and objectives section of your report.

Click on the link for "Evaluation Steps."



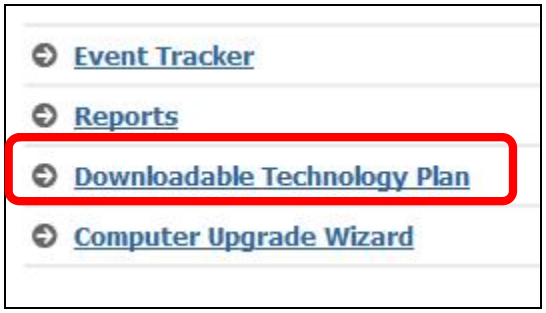
Add an evaluation step from your evaluation strategies.



Your complete technology plan

When you have finished inputting the information into TechAtlas, you can export your data to a Word document and continue editing it from there. You may wish to merge your existing sections (Introduction, Mission Statement, Goal and Objectives, etc.) with the report(s) from TechAtlas.

Click on Downloadable Technology Plan



Click on the link to "Download in MS Word format."

Great job!

Notes: