

**Florida Center for Library Automation
Strategic Plan for 2000-2004¹**

FCLA Vision

Provide high quality, state-of-the-art information technology that assists the SUS libraries in the delivery of information resources in support of teaching, learning, and research for all students and scholars throughout the State University System of Florida.

FCLA Mission:

Through acquisition or development, implement and support high quality computing and telecommunication systems that assist the SUS libraries in managing and providing access to their traditional collections, increase the productivity of library staff, improve inter-library sharing and expand the electronic delivery of information resources to students, faculty and staff.

GOAL 1: Support a library management system (LMS) consisting of software and hardware to assist SUS library operations in the most cost-effective manner.

Objective 1A: Support a system that provides the public catalog, catalog maintenance, circulation, acquisitions, serials control, inter-library loan, and management information functions in either an integrated or loosely coupled fashion.

Strategy 1A.1: Continue to support the existing LMS functions until such time as a new system is installed and working.

Strategy 1A.2: Work with the New LMS Committee in the evaluation of alternative systems.

Strategy 1A.3: After the SUS libraries have selected a system and funding is available, work with the SUS libraries to install the system in the configuration determined by the evaluation process.

Strategy 1A.4: Acquire new inter-library loan (ILL) software from the new LMS vendor or a third party ILL vendor.

Objective 1B: Work with the SUS Libraries to acquire and install a new LMS.

Strategy 1B.1: Participate in new system planning.

Strategy 1B.2: Issue ITN and evaluate responses.

Strategy 1B.3: Negotiate and contract with winning vendor.

Strategy 1B.4: Acquire hardware for new system and expand as usage grows.

Strategy 1B.5: Install and configure software.

Strategy 1B.6: Arrange training.

Strategy 1B.7: Provide NOTIS raw data to new LMS vendor so that the vendor can load the data into the new system.

Strategy 1B.8: Assist the SUS libraries in carrying out functional acceptance test of the software.

¹ Given the rapidity of change in information technologies and the impossibility of foreseeing all potential developments (and therefore, of planning for five years in advance) this plan will be updated biennially by FCLA staff working with the SUS library directors and their standing committees.

Strategy 1B.9: Do local development “around the edges” of new system where necessary, e.g., patron data loads, billing output

Objective 1C: Implement system enhancements that meet changing library needs.

Strategy 1C.1: Provide only critical improvements to the existing desktop clients for catalog maintenance, WebLUIIS, acquisitions, ILL and serials control.

Strategy 1C.2: Assess the state of the art for handling all languages, both Roman and non-Roman, with a special focus on Unicode, and ensure that needed language support is made available in the current system and any future system.

Strategy 1C.3: Evaluate the flexibility of possible future alternative systems to incorporate enhancements as determined by the SUS libraries.

Objective 1D: Implement enhancements as needed to meet state standards for accountability of inventory control, purchasing, fund accounting, accounts receivable, and audit trails.

Strategy 1D.1: Modify the existing system as necessary while it is still operational..

Strategy 1D.2: Evaluate the flexibility of possible future systems for changing to meet new state standards.

GOAL 2: Improve public access to SUS library collections.

Objective 2A: Continue to expand the catalog databases to reflect the holdings of the SUS libraries.

Strategy 2A.1: Continue to load new catalog records, as they become available via WinONI, ftp, and Z39.50 from sources such as OCLC and Marcive.

Strategy 2A.2: Continue to load new approval and order records from a variety of sources.

Strategy 2A.3: Assess the ability of alternative systems to import records from all of the sources used by the SUS libraries and link to electronic holdings.

Strategy 2A.4: Configure new system to correctly load new catalog, approval and order records from all existing sources.

Objective 2B: Implement system improvements that make it easier for library users to search the catalogs and save the results in electronic format.

Strategy 2B.1: For the short-term, enhance WebLuis using the consensus process already in place

Strategy 2B.2: Improve the current Z39.50 server to support new versions of products such as EndNote and Pro-Cite.

Strategy 2B.3: Assess the ability of new systems to download and print search results.

Strategy 2B.4: Configure new system to support SUS download, print and search enhancements.

Objective 2C: Implement additional patron request features for access to physical materials.

Strategy 2C.1: Assess the new systems for the ability to allow patrons to request electronically that circulating items be held, recalled and renewed.

Strategy 2C.2: Assess the new systems for the ability to provide an ILL request form for items not found in any LUIS database.

Strategy 2C.3: Assess the new system for the ability to continue to support and enhance the SUS/Community College borrowing privileges features.

Strategy 2C.4: Assess the new system for the ability to do interlibrary circulation within the SUS.

Strategy 2C.5: Configure new system for all available patron request features.

- Objective 2D:** Increase access for users with physical disabilities.
- Strategy 2D.1:** Work with the SUS libraries to encourage the installation of open Ethernet ports so that users can connect their own assistive technology devices when inside library buildings.
- Strategy 2D.2:** Devise and develop web pages compliant with ADA and the W3C Web Accessibility Initiative (WAI).

GOAL 3: Provide SUS community access to more electronic information in the most cost effective manner.

- Objective 3A:** Work in cooperation with the SUS libraries to license databases.
- Strategy 3A.1:** Assess the technical support requirements for databases under serious consideration by the ECC and inform the ECC about significant issues.
- Strategy 3A.2:** For each selected database, determine contract responsibility and work out appropriate terms and conditions.
- Strategy 3A.3:** Determine the mechanism for payment of license fees, and if necessary, collect funds from the SUS libraries.

Objective 3B: Install and activate databases that are to be maintained on FCLA developed servers.

- Strategy 3B.1:** Continue supporting load programs and loading data for PsycInfo, Engineering Index, ERIC, Books-in-Print, and Wilson's Legal Periodicals and Essay & General Lit Indexes.
- Strategy 3B.2:** Acquire, install and run 3rd party server and loader software from other vendors as requested by the Electronic Collections Committee, e.g., OVID, SilverPlatter, ScienceServer.
- Strategy 3B.3:** Modify load programs and load data for other databases as needed

Objective 3C: Provide search and retrieval links to remote servers in order to present data to users that come from a combination of FCLA and remote servers.

- Strategy 3C.1:** Establish Web interface to remote servers.
- Strategy 3C.2:** Assess Z39.50 services of new systems.
- Strategy 3C.3:** Implement Z39.50 client interfaces and broadcast search capabilities when and where feasible

Objective 3D: Provide authentication software that connects valid users, whether on or off campus, to licensed databases.

- Strategy 3D.1:** Provide proxy servers for remote databases where this is the only access control.
- Strategy 3D.2:** Develop item level security and authorization for access to restricted materials such as electronic reserves, electronic thesis and dissertations (ETDs), and proprietary source images.
- Strategy 3D.3:** Participate in relevant local and national Authentication initiatives.

GOAL 4: Provide tools and services to support building and providing access to library collections of digital resources.

- Objective 4A:** Provide support for libraries' local digitization of non-digital source materials.

- Strategy 4A.1:** Develop and promote PALMM (Publication of Archival, Library and Museum Materials) program to encourage improved inter-library communication and the use of shared guidelines for content and design.
- Strategy 4A.2:** Provide tools and methods for automating common functions related to digitization, such as the creation of structural and administrative metadata, and adding SGML encoding to OCR text.
- Strategy 4A.3:** Continue to provide ongoing technical support for the SUS Florida Heritage Project, including data loading, storage, indexing, retrieval and display.
- Strategy 4A.4:** Provide specific technical support for other PALMM projects as appropriate.
- Objective 4B:** Provide basic tools, strategies and facilities for supporting web-accessible collections of digital content, whether born-digital or retrospectively digitized.
- Strategy 4B.1:** Provide central facilities for loading, storing and serving digital images. Expand support to include moving and scalable vector images.
- Strategy 4B.2:** Provide central facilities for loading, storing, and serving full text encoded in SGML and XML. Implement the Open Text (XPAT) full text search engine.
- Strategy 4B.3:** Provide central facilities for loading, storage, and serving digital audio and video.
- Strategy 4B.4:** Provide tools and methods for cross-domain and cross-collection searching, for example Z39.50 client and server capabilities, and metadata export and harvest capabilities.
- Strategy 4B.5:** Implement OCLC's SiteSearch for storing, searching, and displaying descriptive metadata in MARC and Dublin Core.
- Strategy 4B.6:** Implement tools and methods for creating, searching and displaying the Encoded Archival Description (EAD).
- Strategy 4B.7:** Provide meaningful statistics on use of digital content.
- Objective 4C:** Maintain and enhance support for specific types of electronic collections.
- Strategy 4C.1:** Continue to support and enhance the Electronic Reserves Client (ERC).
- Strategy 4C.2:** Develop and enhance support for electronic theses and dissertations (ETDs).
- Strategy 4C.3:** Load and support Florida Entomologist, Nematropica and other electronic journals where feasible.
- Objective 4D:** Develop the infrastructure to support the SUS libraries in the long-term maintenance and management of large-scale multimedia digital collections.
- Strategy 4D.1:** Develop policy, procedures, facilities and software support for the archiving and preservation of digital objects, both as a centrally-provided service and to facilitate local archiving efforts.
- Strategy 4D.2:** Provide central naming services, including developing naming conventions and running a PURL server.
- Strategy 4D.3:** Coordinate the development of needed local best practices and guidelines, and serve as a central repository for relevant local and national standards.

GOAL 5: Carry out joint planning with the libraries so that the plans for information technology developed by the libraries and FCLA fit together into complementary plans of action.

Objective 5A: Provide a revised and updated FCLA strategic plan on a biennial schedule so that the new plan can be used to justify the libraries and FCLA annual budget requests.

Strategy 5A.1: Write, disseminate, discuss and obtain approval for FCLA's strategic plan.

Strategy 5A.2: Review the strategic plan annually.

Objective 5B: Collaborate with the SUS libraries on strategic and tactical planning.

Strategy 5B.1: Serve as a technical resource to the SUS libraries when requested.

Strategy 5B.2: Collect and maintain comparative data within the SUS to help libraries manage more efficiently.

Goal 6: Experiment with and assess new technologies to support the above goals and objective

Objective 6A: Investigate techniques and software packages for search and retrieval of SUS citations and collections.

Strategy 6A.1: Experiment with various RDBMS packages such as MySQL, PostgreSQL, Oracle and DB2.

Strategy 6A.2: Experiment with various turnkey packages for searching highly encoded full text documents.

Objective 6B: Explore the potential of open systems development with other U.S. libraries.

Strategy 6B.1: Meet with key personnel to formulate broad plans.

Strategy 6B.2: Meet with technical personnel to discuss potential projects.

Strategy 6B.3: If feasible, participate in one or more open systems development projects.

GOAL 7: Obtain the support and financial resources needed for all of the above goals.

Objective 7A: Obtain the support of the Provosts and other SUS administrators for advancements in library information technology and the benefits that follow.

Strategy 7A.1: Advise the UF Provost, the CAVP and other senior SUS administrators on the changes occurring in scholarly communication.

Strategy 7A.2: Advise the SUS library administrators on the changes in scholarly communication.

Objective 7B: Acquire adequate computer hardware and software, telecommunications hardware, software and bandwidth, and technical expertise.

Strategy 7B.1: Anticipate growth needs for a minimum of six months into the future.

Strategy 7B.2: Purchase hardware or lease from NERDC.

Strategy 7B.3: Monitor growth and plan upgrades.

Objective 7C: Obtain necessary funding to make incremental steps toward the above goals.

Strategy 7C.1: Convert strategic plans to budget requests.

Strategy 7C.2: Explain and defend budget requests with the CAVP, BOR, SUS lobbyists, and if called upon, legislative staff and in legislative hearings.