CHECKLIST FOR PLANNING, ASSEMBLING, AND IMPLEMENTING A VIRTUAL LIBRARY

Planning

Mission and Scope
Articulate goals and objectives: what will the library accomplish and achieve?
Define primary audience: who will be served by the library?

Stakeholders
Determine key players: identify essential government/public officials, administrators, managers, library personnel
Secure support and commitment: lobby, prepare presentations and marketing materials

Timeline
Set deadlines: develop project plan with clear sub-projects and deadlines, use project management tools and software to track and manage the project
Define roles and responsibilities: identify who is responsible for each sub-project, determine levels of authority and reporting relationships
Develop contingency plan: identify potential risks and develop methods for overcoming them

Communication
Develop internal communication protocols: identify methods and schedules for project groups and personnel to communicate
Develop external communication protocols: identify methods and schedules for communicating to stakeholders and customers

Evaluation and Assessment
Determine how and when project will be evaluated
Establish outcome measures and criteria for success

Management and Funding

Organizational Structure
Determine management structure and relationship to external partners: establish reporting lines and levels of authority for all levels of the project

Staffing
Determine staffing levels for implementation
Describe job functions, roles, and responsibilities
Hire and train staff
Develop staff training and continuing development program
**Funding**
- Prepare budgets
- Identify potential funding sources
- Prepare grant applications
- Lobby legislatures and other potential funding agencies
- Identify partnerships and cost sharing among member institutions
- Implement cost sharing schemes among institutions

**Technology Infrastructure**

**System Integration**
- Examine existing infrastructure and systems at member institutions
- Partner with member institutions for hardware, software, and staff support
- Establish contracts and agreements with member institutions outlining roles and responsibilities for each area of the project

**Commercial services**
- Examine outsourcing possibilities
- Negotiate license agreements or purchases with vendors

**Authentication**
- Determine, with technology support staff, most efficient and viable method of authenticating users
- Implement remote access mechanisms

**Interface design and usability**
- Develop standards for accessibility
- Ensure access across platforms and devices
- Ensure usability

**Content and Service Development**

**Electronic Resources**
- Determine and purchase needs for electronic subscriptions
- Negotiate license agreements

**Guides and Informational Pages**
- Determine need based on objectives and primary audience
- Develop how-to pages, subject and course guides, and so on

**Resource Sharing**
- Negotiate and sign agreements with member institutions for courier, ILL, and document delivery services
- Purchase vendor hardware and software, if necessary
- Implement courier and ILL services
- Implement document delivery services
Reference Services

- Determine need for reference services
- Develop and implement asynchronous service
- Develop and implement synchronous service