

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