Strategic Plan FY 2008–2013

Office of Strategic Initiatives
The Library of Congress
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The mission of the Library of Congress is "to make its resources available and useful to the Congress and the American people and to sustain and preserve a universal collection of knowledge and creativity for future generations.

For more than 200 years, the Library of Congress has fulfilled its mission to sustain a repository of the world’s knowledge and American creativity and ensure those cultural records continue to be trusted, protected, sustained and accessible. In so doing, the Library’s work has benefited Congress, the nation and the world by holding in trust the vast record of recorded civilization.

Now the world has changed. So the Library must change the way in which it fulfills its mission. Advances in technology are transforming the way information is created, preserved and shared. Digital technologies are affecting nearly all aspects of content creation, dissemination, scholarly research, librarianship and stewardship. This landscape, where content is no longer constrained by the physical bounds of print or other physical media, is characterized by explosive growth in the creation and distribution of content. This has lowered the barriers of entry and defined new roles and new players across the full spectrum of knowledge creation, search and discovery, and distribution.

The Library now finds itself serving new online audiences who find their way to the Library’s Web-based content and services through increasingly sophisticated and powerful Internet search engines. There is ever-increasing user expectation for virtual access to the Library and its resources. The Library now has the technical means, but not infinite resources, to meet these growing expectations and make its unparalleled collections broadly accessible.

The same digital environment has profoundly affected copyrights. It has blurred the definition of original creative works; redefined the roles of traditional intermediaries that publish, disseminate and protect creative works; and compromised verification of ownership, authenticity and provenance of those works. Due to the inherently ephemeral nature of digital information, the risk of content loss substantially increases for everyone.

The purview of content stewards now reaches beyond traditional libraries, archives and research institutions. These stakeholders exist at all levels of federal, state and local governments and in numerous commercial sectors. Stakeholders, who did not have much incentive to collaborate in the past, now share common interests and challenges. The unique position of the Library of Congress, as the nation’s library and the home of the U.S. Copyright Office, places the institution at the nexus of complex public policy deliberations that have substantive and pervasive impacts on both the private and the public sectors.
It is in this landscape of shared opportunities and challenges that the Library has assumed its strategic leadership role. In addition to setting forth a collecting strategy to build a national repository of significant digital materials, the Library and the Copyright Office are developing policies and protocols for the long-term preservation of these materials.

The Library is working closely with the Copyright Office and other Library units to expand the reach and diversity of the Library’s user base; deliver targeted content and services based on better understanding of different user communities and their needs; build and sustain networked digital repositories of knowledge for the nation; establish open common standards and best practices in the emerging fields of Web science, digital curation and preservation; and advance balanced national public policy solutions.

James H. Billington
This Strategic Plan for the Office of Strategic Initiatives serves as a guide for the activities of the service unit and its staff for 2008 through 2013.

The importance of digital technologies to how the Library does business and provides its world-class services will continue to grow as we strive to fulfill our mission in an increasingly networked world that expects information to be as conveniently available as the nearest computer or mobile device.

The Library of Congress’ contribution to this burgeoning information utility can only live up to its promise if we persist in making more of our resources available electronically and collecting and preserving the born-digital content that is otherwise at risk of loss.

The Office of Strategic Initiatives (OSI) was specifically established in 2001 to support an institution-wide plan for achieving these goals. In addition to advancing the work of the National Digital Library (NDL) Program, which, as of 2007, provides more than 22 million digital items on the Library’s various Web sites, OSI also continues to bring the riches of our authentic online materials to teachers and their students nationwide, inspiring critical thinking and supporting standards of education. It was recognized from the beginning of the NDL Program in 1994 that Educational Outreach was requisite to making these resources as useful as possible.

A logical next step was to build an infrastructure to ensure the preservation of these digitized materials as well as the born-digital content that now comprises the majority of information created today. Thus, in late 2000, Congress established the National Digital Information Infrastructure and Preservation Program to address the Library’s need to “sustain and preserve a universal collection” for the 21st century. These programs would not be possible without the work of the Information Technology Services directorate of OSI, which provides the essential technical infrastructure and expertise necessary to support not only these programs but also the technology requirements of the entire Library of Congress.

The institution-wide approach that OSI takes to achieving its goals is increasingly being implemented throughout the Library, as the forces of technology require us to work more cooperatively, both internally and externally. Technology is breaking down the centuries-old “silos” approach and redefining roles and responsibilities for staff. OSI’s flexibility is the result of a team of professionals who are eager to take on new roles as needs and rapidly changing technologies warrant.

This collaborative ethos and an expert staff are what will lead us through these next five years and beyond, as the Library of Congress continues to transform itself into a bricks-and-bits library for this century and beyond.

Laura E. Campbell

FOREWORD FROM THE ASSOCIATE LIBRARIAN FOR STRATEGIC INITIATIVES AND CHIEF INFORMATION OFFICER
Collecting and preserving history in all its forms: “Herodotus,” by sculptor Daniel Chester French, is one of 16 bronze statues perched along the balustrade of the Main Reading Room of the Library’s Thomas Jefferson Building to recognize important fields of knowledge. Herodotus is known as the Father of History. For more than 200 years, the Library has collected and preserved a universal collection of materials relating to the history of the nation and its achievements. Today, those materials are often created in digital form.
INSTITUTIONAL PRINCIPLES

Many time-tested institutional principles guide the performance of the Library’s unchanging mission. These principles provide the foundation for the Library’s strategic plan for the future and the alignment of the strategic plan of the Office of Strategic Initiatives with those principles.

Through a network of strategic collaborative relationships, the Library will deepen its understanding of how to maintain these principles both within the Library of Congress and throughout the nation. Through its continuing work in the next few years, the Library uniquely will be able to provide unbiased information to Congress and ensure that the cultural and intellectual record of American creativity is sustained for future generations.

Only through collaborative networked relationships can the Library strive to make as accessible as possible its analog collections of more than 134 million items in 470 languages. The exponential increase in the creation of content only in digital form also requires the Library to pursue opportunities for both technical and stewardship collaborations. The Library has made substantial progress in building a broad-based collaborative network of external partners in the past and is breaking new ground in several significant ways, including:

• modeling and testing collaborative digital preservation strategies
• championing digital preservation research across multiple disciplines and content stewardship communities
• defining networked and interoperable technical architecture models
• seeking networks of committed, trusted partners to share digital content stewardship, infrastructure capacities and technical knowledge
• developing a national network of teachers to incorporate primary source materials from the Library’s online collections into classroom curricula.

The following principles will be observed in continuing to build on this progress:

Maintaining Trust and Stewardship. The Library of Congress maintains trustworthiness in its roles as provider of unbiased, authoritative research services to Congress; as protector of American creativity through its Copyright Office; as the national library and steward of the nation’s universal collections; as the nation’s law library; and as expert knowledge navigator. During this extraordinary period of transformation from analog to digital media, the Library will advance public policy considerations that respect the rights of intellectual property owners, enable ubiquitous access to
Over its 200-year history, the Library has demonstrated its ability to adapt its organizational, operational and technology infrastructures to new challenges. This unwavering commitment to maintaining agility and flexibility over time ensures that the Library’s unchanging mission to support Congress and the American people remains current, vital and relevant in the 21st century.

knowledge, preserve analog and digital records of creativity and encourage renewal of that creativity. This invaluable principle of trust and stewardship upholds the Library’s timeless mission and value to the nation.

**Ensuring Content Authority, Integrity and Authenticity.** The Library relies on its unmatched human knowledge resources, which include policy researchers, intellectual property experts, curators, librarians and knowledge navigators. Together they share an institutional responsibility to provide authoritative, unbiased research and intellectual property policy advice to Congress and ensure the provenance, authenticity and validity of the nation’s cultural and legal records.

**Maintaining Interactive User Services.** The Library provides its authoritative content and knowledge services to Congress, the American people and online global audiences. As content is unbound from physical media and distributed across shared networks, the Library will continue to put the needs of Congress and its expanded audiences first.

**Continuing Collaboration.** In the analog realm, the Library already has built and leveraged an extensive network of partners and relationships across global communities to expand its collections and increase their availability. Increased communication and information connectivity are creating new opportunities to further the Library’s collaborative efforts across disciplines, stakeholder groups and global user communities. The Library will expand these opportunities and adopt new models of collaboration both nationally and internationally, enabled by advanced technologies.

**Fostering Innovation.** Over its 200-year history, the Library has demonstrated its ability to adapt its organizational, operational and technology infrastructures to new challenges. This unwavering commitment to maintaining agility and flexibility over time ensures that the Library’s unchanging mission to support Congress and the American people remains current, vital and relevant in the 21st century.

**OFFICE OF STRATEGIC INITIATIVES**

The Office of Strategic Initiatives (OSI) was established during 2001. OSI is under the leadership of the Associate Librarian for Strategic Initiatives/Chief Information Officer (ALSI/CIO). The ALSI/CIO oversees the Library of Congress’ investments in content in digital form, Web-based content access services and the underlying technology infrastructure that enables mission performance of the institution. The ALSI/CIO also oversees the Library’s national digital-content-preservation and educational outreach programs, both focused on building broad-based external partnerships and relationships in support of the Library of Congress mission.

OSI’s traditional information technology services support the Library’s units in servicing the needs of Congress and the nation. Information technology services include secured business information and content management systems; voice, data and telecommunications network services; workstation configuration management services; and other sustaining technology infrastructure within the institution’s enterprise architecture.
OSI is more than the enabling infrastructure of the Library of Congress. Our evolving role in steering the transformation of the Library in the digital environment supplements our traditional role of maintaining stewardship over the Library’s information technology assets, services and infrastructure. OSI is at the forefront of providing comprehensive online digital access services, converting analog materials into digital form, archiving the Web and providing the Library’s Web-based digital library services and educational outreach services that encourage broad national and international use of the Library’s online primary sources.

These core OSI functions serve as the foundation from which the Library increasingly can broaden its reach and mission impact on a national level. OSI leads the National Digital Information Infrastructure and Preservation Program (NDIIPP), an ambitious and significant national program to preserve the nation’s cultural heritage. This pioneering program is building a collaborative partnership network to save the nation’s important “at risk” digital content and support the long-term preservation of digital materials. OSI also leads a program to develop a national network of educators to encourage the educational use of the Library’s online primary source materials across the nation.

Digital content, especially that which exists in no other form, requires active joint stewardship by technical and curatorial Library units. Regardless of the intellectual content embodied in digital files, OSI’s active management of the supporting information as well as the repository architecture and technology infrastructure is essential to ensuring both content sustainability and accessibility in the future.

**OUR VISION AND STRATEGIC GOALS**

*Build the content, services and technology infrastructure of the Library of Congress in an increasingly networked environment*

- Enabling expansion of the Library’s collections
- Enhancing access and usage of the Library’s collections and services
- Redefining technology infrastructure to include information stewardship
- Providing value through invested organizational assets

Our vision is to enable the Library to continue collecting, archiving and sustaining records of cultural knowledge and creativity; to build trusted access and preservation tools and services; to advance open standards and best practices to ensure the sustainability of the nation’s cultural records; and to engage national and international partners in preserving the world’s critical digital assets.

OSI will use technology to discover and apply new solutions for acquisition, preservation and delivery of both content and services. Our goal is to continue investing in the core technology infrastructure to acquire, preserve and provide access to content while supporting the delivery of critical services to the institution. We will ensure all our

OSI is at the forefront of providing comprehensive online digital access services, converting analog materials into digital form, archiving the Web and providing the Library’s Web-based digital library services and educational outreach services that encourage broad national and international use of the Library’s online primary sources.
Our goal is to continue investing in the core technology infrastructure to acquire, preserve and provide access to content while supporting the delivery of critical services to the institution. We will ensure all our organizational assets are invested to achieve the Library’s timeless mission and its goals in the coming years.

OSI will continue to leverage strategic opportunities presented by advances in distributed, networked, Web-based and mobile technologies. We will build trusted relationships with other cooperating partners to share technical knowledge and tools, and leverage existing technology infrastructure capacities in shared networks.

OSI will ensure that opportunities presented by technology are assessed in the context of the Library of Congress’ unique position as both the national library and the home of the U.S. Copyright Office. The challenge is to enable the Library, through the balanced use of technology, to make its resources sustainable and readily available to Congress and the nation while protecting the rights of intellectual property owners through secured digital content distribution and delivery mechanisms. Most importantly, OSI will continue seeking opportunities for shared digital content stewardship and access responsibilities across multiple communities.
Chart A: A Network of Partners, an Infrastructure for Preservation

National Digital Information Infrastructure and Preservation Program

**VISION**
Ensures long-term access to a rich body of digital content through the establishment of a national network of committed partners

**PRESERVATION INFRASTRUCTURE**
Two key components of Infrastructure:
- **Preservation Network**: Partners collaborating to preserve and provide long-term access to digital content
- **Preservation Architecture**: Technical components that enable digital preservation

**VALUES**
- Support the needs of multiple communities over long periods of time
- Respond to rapidly changing technologies and innovative behaviors
- Be transparent and trustworthy
Is it real or is it virtual? "The Falls of Niagara--From the Canada Side," is by Currier & Ives, ca.1868. It has been digitized for the Web; the International Space Flight Museum in Second Life is a three-dimensional world created entirely by its residents that only exists digitally. These are both being preserved through Library of Congress programs.
Objective: Enable creation and intake of sustainable digital content

Just as with analog formats, the Library of Congress selects from the universe of created digital content that which is most important for the work of Congress, the research community, students and lifelong learners as well as the economic, creative and intellectual welfare of the nation. Because the universe of what is produced is so vast in the Digital Age, no single institution, not even the Library of Congress, can realistically assume sole responsibility for all created digital works important to the nation.

OSI will continue to support the collaborative building of collections of national interest and the 21st century collection strategies of the Library’s service units. OSI will support the intake of items received through multiple channels that include digital content acquired through legal deposit, purchase and special agreements. The resulting body of content will represent a broad array of digital content types acquired directly and through a network of collaborating institutions.

By 2013 we expect to have in place:

• Increased digital content holdings
• Capability to produce and receive sustainable digital content from multiple sources
• A stewardship network of collaborative partners
• Recommendations on digital content information architecture, preservation and access
• Recommendations on public policy for digital content preservation and access.

Increased Digital Content Holdings

Through the use of current and developing technologies and expertise, OSI will work with Library service units and external partnerships to enable the significant growth of the Library’s digital content, both born digital and converted. OSI will develop a consultative plan for adding and keeping digital content for the Library’s own collections and for expanding capacity to manage and sustain that content over time. The plan will be formulated in the context of the Library’s overall collections strategy to integrate digital content into its unparalleled analog collections.

OSI will foster awareness of the importance of creating sustainable digital content at the point of creation. This educational process will include encouraging Copyright depositors and other content contributors to the Library’s collections to submit digital content in sustainable formats that meet preservation standards.

Born digital: This year, the Library of Congress began a blog to introduce readers to the extraordinary collections, programs and events of the Library. The Library’s National Digital Information Infrastructure and Preservation Program is saving and preserving selected blogs, which are born digital—they exist in no other form.
**Born Digital.** As the world makes the transition to “born digital” content creation and distribution, OSI will help ensure the acquisition of critical “born digital” content for which the Library assumes sole or shared stewardship responsibilities. As we begin to better understand the technical requirements for taking this content in diverse formats from a variety of automated means, OSI anticipates significantly increasing the volume of “born digital” content in the next few years.

OSI already has collected from the digital universe a broad range of significant material: as of FY 2007, a total of 69 terabytes of content from the Web. This total represents the equivalent of digital text information of more than 69 million books (1 megabyte per book of text only). This body of contemporary political, cultural and legislative content includes material relating to U.S. elections, the war in Iraq, Web sites of congressional members and important Web-based citations used in Congressional Research Service reports to Congress.

**Digitized.** In planning for digital conversion activities, OSI will maintain, upgrade and expand the American Memory Web site and support other content conversion efforts. In support of the Library’s continuing efforts to digitize content in the Library’s analog collections of interest to online users everywhere, OSI will increase the production of high-quality digital counterparts and appropriate metadata. OSI now maintains a total of more than 22 million digital files, much of which results from the Library’s award-winning American Memory program, begun in 1990 to provide broad virtual access to our public domain analog collections. OSI will continue to provide the technical and procedural support required to convert analog collections to digital form.

We also plan to support the development of the Library’s new World Digital Library initiative to convert and make accessible in multiple languages significant cultural documents from other libraries and institutions around the world. The Library of Congress began a public-private World Digital Library initiative, in consultation with UNESCO and other national and international entities, to include libraries and cultural institutions. OSI is addressing issues such as system architecture, selection and presentation of content, governance and financial sustainability, as well as developing a prototype site and supporting digitization efforts in several developing countries.

**Capability to Produce and Receive Sustainable Digital Content from Multiple Sources**

OSI will build the capacity to accept digital content through a broad array of channels, including legal deposit, purchase, special agreements and Web capture. This will require implementing processes and tools for the preparation, intake and management of content received. OSI will explore technical collaborations with outside institutions and corporate partners to capitalize on external expertise, strengths and existing efforts already under way. OSI will invest in and acquire automated tools and technologies by monitoring and incorporating technical advances, thereby not only improving efficiency but also ensuring the integrity of content acquired and improving the quality of content produced.
OSI has begun building several pilots for deposit of electronic scholarly journals, digitized historic newspaper collections and audiovisual collections. We have also begun the development of a tool to support the collection of Web content that, once complete, may be made available to national and international communities. We will build automated tools for validating and assessing the characteristics of content and for automatically extracting metadata.

For digitized content produced under the Library’s control, OSI will improve technical processes to ensure content validity, quality and sustainability. For example, OSI is now collaboratively participating in the development and testing of a digital image validation application. The application is being developed as part of a broader joint initiative sponsored by Harvard University Library and a nonprofit organization focused on archiving electronic scholarly journals. The developed application is planned for release as an open source tool in support of the broader digital preservation communities.

OSI will work with other Library service units as well as external entities to formulate digital content standards, best practices and guidelines for format and associated metadata, consistent with preservation and use of digital content.

Stewardship Network of Collaborating Partners
Working with other service units of the Library, OSI will document the scope of collecting and preservation responsibility for the Library within a national collaborative context. OSI will seek opportunities with external public, nonprofit and commercial institutions for shared national digital content stewardship responsibility. Information and knowledge sharing is key to leveraging jointly produced tools and services, shared infrastructure capacities and effective joint investment of scarce economic resources. The Library and its trusted partners will sustain the network through shared collection and stewardship costs and responsibilities.

OSI will enable the Library of Congress to function as a core “hub” in the national network of committed stewardship partners. The Library of Congress will be collector and preserver of important “at risk” digital content. OSI’s NDIIPP partners already have begun to collect from the digital universe a broad range of significant material created only in digital form, including content published only to the Web. Through existing shared stewardship agreements, a heterogeneous body of digital content will result from our NDIIPP partnerships, including geospatial data, digital public television, foreign news broadcasts, social science data, business records from the dot-com era and content focused on the history and culture of the American South.

Recommendations on Digital Content Information Architecture, Preservation and Access
Although digital preservation is still a relatively uncharted endeavor, many national and international entities, both not-for-profit and commercial, are now actively engaged in specifying standards, guidelines and best practices. These efforts focus on guidelines
related to preservation formats and content packaging, as well as metadata conventions describing the nature and technical aspects of the content.

In the coming years, OSI will work collaboratively to define and build an effective information architecture that supports digital content preservation and access. We will define digital content and associated metadata workflow procedures and interfaces for authentication, validation, intake, preservation and access.

**Recommendations on Public Policy for Digital Content Preservation and Access**

A fundamental mission role of the Library of Congress is to balance the rights of content owners with the need for ensuring long-term preservation and access to the nation’s repository of knowledge and information. As the home of the U.S. Copyright Office, the Library is in an ideal position to understand how best to achieve the balance and foster productive public policy debates and increased awareness and education. Currently, OSI is working with the Copyright Office to develop proposals to amend the copyright law to enable digital preservation and mandatory deposit of electronic content without undermining the rights of copyright owners.

The Library of Congress now has an unprecedented opportunity to be the national “honest broker” that provides balanced public policy recommendations to digital content owners, distributors and content stewards. OSI now co-sponsors the Section 108 Study Group with the Copyright Office, which is a 19-member committee of copyright experts from various fields, including law, publishing, libraries, archives, film, music, software and photography. Currently, section 108 of the Copyright Law provides limited exceptions for libraries and archives to make copies in specified instances for preservation, replacement and patron access. These provisions were drafted with analog materials in mind and do not adequately address many of the issues unique to digital media, either from the perspective of rights owners or libraries and archives. The Section 108 Study Group will seek to strike the appropriate balance between copyright holders and libraries and archives in a manner that best serves the public interest. They are also exploring complex issues surrounding reproduction and distribution of digital copies of works for users and other issues related to user access of digital media. The Study Group’s report is due in late 2007.

OSI will continue working with the Copyright Office, Library Services, its NDIIPP partners and other external intellectual property, digital media, technology and archival experts through consultation, meetings and workshops to further these important public policy goals.
**Chart B: Digital Content Intake and Stewardship Models**

OSI GOAL: Build the 21st Century Library of Congress Content, Service and Technology Infrastructure for a Networked Environment

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<th>STEWARDS OF CREATED/ACQUIRED CONTENT</th>
<th>STEWARDS OF LICENSED CONTENT</th>
<th>ENTRUSTS OTHERS</th>
<th>SHARES STEWARDSHIP IN NETWORK</th>
<th>OTHER FUTURE MODELS</th>
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<td>converts to digital form</td>
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<td>gets through mandatory deposit provision</td>
<td>receives through donations</td>
</tr>
<tr>
<td>converts to digital form</td>
<td>harvests from web</td>
<td>gets through special agreement with others (agents, collecting partners)</td>
<td>acquires as paid-for acquisition</td>
<td>stews as licensee/subscriber</td>
</tr>
<tr>
<td>receives through copyright deposit/registration</td>
<td>gets through mandatory deposit provision</td>
<td>receives through donations</td>
<td>participates in national content stewardship network arrangements</td>
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Levels of Library of Congress Stewardship

illegal STEWARDSHIP

- stewardship roles
- content sources

DISTRIBUTED/SHARED STEWARDSHIP

illegal STEWARDSHIP

- stewardship roles
- content sources
Providing service through collaboration: An example of the Office of Strategic Initiatives' collaborative approach to achieving goals is the National Digital Newspaper Program, in which the Library's OSI and Library Services are working with the National Endowment for the Humanities to place important historic newspaper pages online in searchable form. This is page 1 from the Aug. 8, 1900, edition of The (Washington, D.C.) Evening Times. The story at the upper right reports that William Jennings Bryan and Adlai Stevenson have received the Democratic Party’s nominations for president and vice president, respectively.
Objective: Increase use of and seamless access to digital content and services

Our objective is to embrace opportunities for expanded virtual access to the Library’s content and services, and those of its collaborating partners, by increasing the number and diversity of users. Advances in technology have significantly raised expectations about online accessibility to the unparalleled collections of the Library. The Library, through its Web presence, now serves growing online general public and education-focused communities, warranting innovative virtual content and service delivery approaches and mechanisms. However, increased accessibility also elevates potential data security risks and risk of unauthorized access. OSI is keenly aware of the need to ensure the authenticity and integrity of content and to protect copyrighted content from unauthorized access. It is with clear recognition of the Library’s trusted stewardship role, the potential risks of infringing intellectual property rights and growing privacy concerns that OSI has defined its services objective.

To date, the Library’s overall Web site annually handles more than 5 billion transactions, or “hits.” This statistic accounts for all major sub-sites of www.loc.gov including THOMAS, Online Catalogs, Exhibitions and American Memory, the most popular destination for visitors to www.loc.gov.

The Library’s Web site now attracts a greatly expanded and growing user base including K–12 students and teachers and the general public. These users are more technologically savvy and expect the Library to deliver digital content in ways that are meaningful to their specific communities. By systematically assessing the access needs of core and potential audiences, OSI will improve digital content search and discovery, and usability and availability, and will support the creation and expansion of selected user-focused digital programs and services.

The Library cannot do this alone. OSI will continue to expand its established technology-oriented and content-based network of partners to enable the Library to more effectively make its content, services and curatorial knowledge broadly available and useful to its online audiences. An example of this collaborative focus is the National Digital Newspaper Program (NDNP), a long-term effort with the National Endowment for the Humanities to develop an Internet-based, searchable database of U.S. newspapers now in the public domain that provides the most historically significant newspapers published between 1900 and 1910. When completed, digitized newspapers will be made broadly available through the Library’s Web site. OSI will be validating technical
OSI will continually monitor use of the Library’s Web site to evaluate the effectiveness of content and service delivery, measure user satisfaction, as well as identify emerging user needs. We will develop strategies to target specific online audiences, as well as become further informed about existing and emergent audience segments.

approaches for the processing and accessing of complex digital objects and a multifunctional user interface. OSI also will expand our network of educational partners to provide targeted content and resources to our fastest growing online audience segment, the K–12 community.

Through 2013, we expect to:

• Increase use and awareness of content and services by target user communities
• Improve integrated search and discovery
• Secure delivery of digital content and services
• Enable multiple ways/methods of access to digital content and services
• Facilitate integration of the Library’s primary sources into K–12 educational settings and networks.

Increase use and awareness of content and services by target user communities

There now are more than 22 million digital items represented on the Library’s Web sites, including materials digitized from the collections and exhibitions, program activities and interpretive information. The Library’s Web site offers electronic versions of many resources of historical research and educational value that no other institution provides.

Our Web-based content and services are extensive, yet many potential users remain unaware of the ready availability of these services and resources. OSI will expand the public’s awareness of the Library’s unique and authoritative online sources of content and resident knowledge expertise. OSI will collaborate with units across the institution, external technology and content partners and other federal agencies to target and reach the Library’s core online audiences.

OSI will continually monitor use of the Library’s Web site to evaluate the effectiveness of content and service delivery, measure user satisfaction, as well as identify emerging user needs. We will develop strategies to target specific online audiences, as well as become further informed about existing and emergent audience segments.

Improve integrated search and discovery

OSI will determine user preferences in accessing, using and interacting with the Library’s authoritative digital content and resources. We will examine the information-seeking behaviors of online audiences and identify, create and implement applicable search and discovery tools and technologies.

Users should readily find what they seek either through ubiquitous Internet search engines or through navigation within our Web site. Users must be able to search for, discover and locate Web-based content sought in a consistent and time-effective manner. We will strive to make resources “discoverable” by internal and external search utilities and provide users with context at all stages of their search experience.
As an example of the kind of success that can be achieved through improved search and discovery tools, user traffic to the THOMAS Web site more than doubled recently. THOMAS provides public access to congressional records and reports, draft legislation and federal laws, lists of presidential nominees and U.S. treaties. This increase coincided with the debut of the redesigned THOMAS user interface with a user-friendly page design comparable to intuitive, widely used search engines. Users were able to access nine different legislative databases from a single entry point, resulting in a faster, more efficient search process.

Through OSI’s new metasearch effort, we are designing and building an integrated search application to allow users to search across the Library’s publicly available digital content collections from one unified interface. We will focus on the implementation of a search gateway to multiple Library collections in the form of a metasearch tool. The metasearch initiative will continue to improve tools available for navigation and discovery of Library online resources, with the goal of providing integrated approaches that guide users in intelligent ways.

Secure delivery of digital content and services
As the Library makes its digital resources and services available to broader virtual audiences, OSI will ensure that access does not compromise the Library’s information systems and the integrity of its digital holdings. We will identify, monitor and maintain compliance with relevant federal laws, regulations, policies and guidelines related to information systems and data security. We will maintain the currency and applicability of our information policies and data access policies.

OSI will continually seek guidance from the U.S. Copyright Office and collaborate with the Library’s internal and external content partners to ensure that respect for the rights of content creators and copyright holders is maintained. We will monitor evolving digital rights and privacy concerns over digital content distribution, much of which remain unresolved.

Expand channels (e.g., RSS feeds, podcasts, mobile devices) for delivering digital content and services
Technological advances have produced multiple ways of delivering content and services to users. Many of the mechanisms that exist today were not in existence five years ago. As Internet and communications technologies evolve, users will have ready access to innovative mobile technologies far beyond Web-based browsers and PC-based services and applications.

We will monitor trends and industry research regarding the pervasiveness and adoption rates of emerging information-delivery technologies. OSI will be prepared to deliver content and services to increasingly mobile users with differing levels of technology competency and usability needs. For example, focusing on education, the Jefferson Building’s New Visitors Experience will combine analog and digital materials to create a seamless experience for both onsite and online visitors of all ages. Through the use of
new technologies, irreplaceable treasures from the Library’s collections will be virtually placed in the hands of visitors, allowing them to explore the intricacies of these unique objects with the aid of expert interpretation by the Library’s curators. These learning activities will be replicated and extended online, making them accessible to schools across the nation.

**Increase use of the Library’s digital primary sources in K–12 educational settings and networks**

Digitization has created an unprecedented opportunity to make the Library’s resources available and useful to the nation’s education community. OSI will develop and coordinate with other Library units the Library’s core programming for K–12 educational settings and further facilitate the integration of the Library’s digital primary sources into classrooms and curricula. As a new partner in Internet2, the Library can further broaden its reach through partnerships with member universities, school districts and cultural institutions.

The Library is currently developing an extensive “virtual institute,” an online professional development program designed to bring teachers from across the country in a virtual environment to learn strategies for integrating the Library’s digital collections and expertise into their classrooms and curricula. As a core strategy, OSI will develop the Library of Congress Teaching with Primary Sources Program, a national program establishing a network of partnerships with K–12 and higher education communities that ultimately will reach all 50 states. Forty-nine states and the District of Columbia currently require the use of primary source materials in their state teaching and learning standards. The combination of the identified need to integrate primary sources in the curriculum, the successful pilot of building a network of teachers and the demand for high-quality online educational programming has given the Library the opportunity to make the Teaching with Primary Sources Program a national program, with the ultimate goal of establishing partner programs in all 50 states and the District of Columbia.
<table>
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<th>TYPES OF SERVICES</th>
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<td>Web content</td>
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</table>
Linking Culpeper to Capitol Hill: Information Technology Services provides networking capabilities between the newly opened Packard Campus for Audio-Visual Conservation in Culpeper, Va., as seen in these two views, and the Library’s reading rooms on Capitol Hill, approximately 60 miles away.
Objective: Maintain, expand and adapt technology infrastructure to support mission performance and enable information stewardship

Building on the foundation of the Library’s current information technology services, OSI has the charge to provide the flexible, scalable and, to the maximum extent feasible, interoperable technology infrastructure for sustainable digital content management and service delivery. We will provide the Library and its service and infrastructure units with enabling technology capability. OSI will expand our network, storage, application development and data centers’ capabilities to ensure future mission performance. This includes supporting the following mission-critical service delivery priorities of the Library:

- **Implementing the Wide Area and Local Area Networks (WAN/LAN) for the Packard Campus for Audio-Visual Conservation in Culpeper, Va.** A digital preservation and acquisition system to preserve and provide research access to both newly acquired born-digital materials as well as analog legacy formats is a major future strategic focus of the center. The center’s operational success depends upon robust networking capabilities and data/voice telecommunications services, which will link the Culpeper facility, 60 miles from Washington, D.C., to Capitol Hill and the Library’s Alternate Computing Facility.

- **Supporting the efforts of the Congressional Research Service to provide integrated legislative information services to Congress.** The Legislative Information System (LIS) is CRS’ official legislative information retrieval system designed to support the dedicated needs of both Congress and CRS. The overall customer-driven objective of the LIS is to facilitate congressional and CRS analysts’ real-time comprehensive search and retrieval of bill data (Bill Summary & Status), the full text of bills and the full text of committee reports from a single unified search page covering all available Congresses.

- **Supporting the copyright registration and deposit reengineering effort of the U.S. Copyright Office.** The public service reengineering initiative begun in September 2000 aims to improve Copyright Office service delivery to creators and users of copyrighted works by enabling customer-based, Web-enabled online registration and recordation services and copyright record searches.

A key challenge is for OSI to apply the right set of leadership and management tools to steer the Library’s overall technology transformation. OSI will employ sound research,
development and operational practices; structured system development techniques; architecture planning and development methodologies; and strategic information technology project management and processes.

At a minimum, investment in the underlying basic information technology infrastructure components is necessary to avoid technological obsolescence and degradation in existing service delivery to OSI's internal customers. We will monitor industry best practices and technologies to maintain the currency of the Library's basic technology infrastructure components.

It is clear from an assessment of the Library's mission-critical service delivery priorities that OSI must also make concurrent targeted investments in the future of distributed, decentralized information content and business management systems. Most important, additional recurring investments need to be made in expert knowledge resources and capabilities to remain current in our technical competencies and enable Web-based content and service delivery and long-term digital content stewardship. OSI will leverage best practices in information architectures, distributed and shared networks and capacities, and advanced technologies, standards and protocols to support secure and reliable preservation and access to digital content.

In addition, OSI’s national and internationally focused objectives, as articulated for NDIIPP and the future World Digital Library initiative, are to share technical knowledge; encourage national and international standards and best practices for digital repository interoperability; and leverage large-scale repositories and storage infrastructure capacities already under way in stakeholder communities beyond traditional libraries and archives.

Key outcomes associated with our technology infrastructure objective include:

- Secured, available and scalable technology infrastructure
- Defined Library of Congress technical infrastructure for shared tools and services among networked entities
- Defined future institution-wide architecture and support for a national networked digital information architectural framework
- Specialized institutional digital media repository services
- Preserved authentic digital content over time.

**Secured, Available and Scalable Technology Infrastructure**

Our objective is to build a cost-effective, scalable, secure and available technology infrastructure that sustains the Library’s services and is compatible with the networks of our users.

The Library must be capable of being a partner within a distributed national network; therefore, it seeks appropriate flexibility and robustness in its infrastructure through
the use of open common standards, supportable open-source software and commercial-off-the-shelf software components where applicable and when cost-effective.

OSI, together with the service units and infrastructure units, will assess the current technology capabilities and services in terms of the Library’s broad range of business-support requirements and digital content management needs. The baseline assessment will be used to define future infrastructure transition and development plans. OSI will continually refine and update these technology infrastructure components and associated policies and procedures to ensure they are adaptable to the Library’s technology services and communication needs.

Basic infrastructure components, incorporating a broad spectrum of integrated technologies, will be based on leadership-class software, hosting services, hardware and network capacities.

**Defined Library of Congress Technical Infrastructure for Shared Tools and Services Among Networked Entities**

To the maximum extent feasible, OSI will ensure the Library’s digital repository services can interoperate with a decentralized distributed network framework. OSI will form collaborative relationships with selected federal, state and local agencies; libraries and archives; commercial industry entities; and scientific research institutions. OSI will identify large-scale repository infrastructure capacities that already exist or are under way and adopt the most advantageous best-practice approaches.

A key strategic undertaking is supporting the further development of a national technical architecture definition, modeled after the Open Archival Information System (OAIS) standard, ISO 14721:2003. Used by the National Archives and Records Administration and Government Printing Office, as well as international digital preservation initiatives, the OAIS model defines primary functions and roles for organizations and systems that offer archiving services.

The defined national architectural framework specifies three primary functions for partners engaged in digital preservation—Storage, Stewardship and Access. Storage includes all functions necessary to certify that the physical bits are intact and authentic and can include activities such as backup or mirroring the content. Stewardship of the digital content by the preserving institution includes managing the processes and specifications to bring content into an archive; managing information or metadata about the content; and making and implementing decisions about the content throughout its lifecycle. Access to the digital content may be restricted due to intellectual property, security or privacy constraints. The architecture allows for the three primary functions to be shared; for example, one institution may be able to offer storage services to others so that two or more institutions can be engaged in access and stewardship.

The proposed technical architecture requires the support of common technical understandings and processes for exchanging content and sharing preservation functions across institutions within a national network:
• The technical architecture assumes that the mission of each institution will place requirements and constraints on the hardware, software and workflows used to support the functions; therefore, the systems at these institutions could be unique and diverse.

• Agreement on standards for the data is required for the successful distribution of functions for preservation.

• Standards for file and metadata formats provide a common ground for partners to share in developing guidelines and protocols for interoperability.

Defined Future Institution-Wide Architecture
OSI is committed to building an enterprise-wide architecture that will provide for both the support of the service and infrastructure units of the Library and a national architectural framework for content stewardship and service and content delivery. OSI will document the existing Library-wide architecture, define the desired architecture and develop a transition plan. The future architecture will be the blueprint and framework that will guide the technology transformation of the Library of Congress. The architecture will sharpen the focus on the technology infrastructure needed to meet the anticipated future internal and networked national operating landscape. OSI will rely on the strategic plans articulated for the Library and its service and infrastructure units to drive the architecture planning effort.

Specialized Institutional Digital Media Repository Services
OSI will work with technology industry leaders and the digital preservation community to design and implement the Library’s archival preservation and storage systems that provide maximum reliability for all categories of digital content. The repositories’ services will support both responsive access where allowed and reliable security where access is not allowed. To fulfill that responsibility, OSI will ensure that repository services are secure, trustworthy and scalable. Specialized repository services will be developed to sustain content with a wide range of media characteristics, storage, workflow, and access and data security requirements. Institutional digital media repository services also will include format and technical and administrative metadata management.

Preserved Authentic Digital Content Over Time
OSI is responsible for long-term stewardship of multimedia digital content of the Library and ensuring that content is accessible within defined access limitations. Content migration strategies will be developed to avoid the dangers of technical obsolescence and content loss and ensure digital content availability to future generations.
The center entrance doors of the Thomas Jefferson Building depict Humanities and Intellect.
Objective: Ensure organizational assets are aligned with strategic intent, invested to get results and contribute value to the Library of Congress mission

We are committed to achieving consistent operational excellence within the institution and in our national and global strategic partnerships and relationships. Operational excellence will be achieved through investments in strategic priorities that contribute value to the mission of the Library of Congress.

Expected outcomes of our organizational objective are:

• Workforce, budget, capital investments and other assets aligned with strategic intent
• Operational results reflect successful execution of strategic intent
• Mission contributions are measurable and cumulative.

Workforce, budget, capital investments and other assets aligned with strategic intent

OSI’s assets include our workforce, budget, capital investments, allocated space and facilities, communications and other central service unit resources. Workforce development efforts will focus on manager core competencies; continuing staff learning; and internships, exchanges and recruitment for crucial expertise from media and information technology sectors and higher education institutions. All assets will be aligned to produce strategic results that cumulatively increase service unit value.

Operational results reflect successful execution of strategic intent

OSI will identify, develop and implement performance measures and systems that are meaningful and aligned with Library-wide performance indicators. We plan to develop quantitative and qualitative measures that assess tangible and intangible benefits achieved. Performance mechanisms will be implemented to improve program decisions and actions, overall operational efficiencies and employee performance assessments.

Mission contributions are measurable and cumulative

OSI is committed to an accountable and transparent work environment. On a regular basis, we will communicate and report on performance and stewardship results to Congress, appropriators and donors, the Library’s partners and Library staff.
CONCLUSION

The Library of Congress’s mission as national cultural steward for Congress and the American people remains vital and relevant in the 21st century. Although the institution is facing unprecedented challenges, the rewards for meeting those challenges and embracing new opportunities are equally unprecedented. By working with our national and international network stakeholders and partners to build and sustain universal collections, the Library of Congress will help secure the resources necessary for the United States to maintain its position as a world leader in the global information society.

Our strategic direction reflects a clear sense of responsibility for the institution and its national and international reach. OSI will contribute value to the institution’s mission through our technology infrastructure capacities, knowledge and expertise about digital content and collection, and networked relationships. OSI will maintain an unbiased and collaborative leadership role. We look forward to working with other service units of the Library in building the sustainable technical capacities and knowledge capabilities of the 21st century Library of Congress.

The collection and preservation of digital content, as well as the educational initiatives begun by OSI and supported by the U.S. Congress, can lead to broadly shared stewardship roles among national partners in every part of the country. Representing the broad spectrum of private and public sector constituents, our partners join the Library in their commitment to collecting, preserving and making available cultural records of the world’s knowledge and American creativity.

By working with our national and international network stakeholders and partners to build and sustain universal collections, the Library of Congress will help secure the resources necessary for the United States to maintain its position as a world leader in the global information society.
Chart D: Access Service Models

OSI GOAL: Build the 21st Century Library of Congress Content, Service and Technology Infrastructure for a Networked Environment

Audiences served:
- People of the World
- American Public
- Networked Partners (e.g., based on special arrangements)
- Creators/Rightsholders
- Congress
- Legal Communities
- Museum/Archives/Libraries
- Blind & Physically Handicapped
- Law Libraries

Types of services:
- Congressional Research Service
- Copyright Registration/Deposit services
- Legal Information Network, online community, and Congress (e.g., Global Legal Information Network, online products/services)
- Library services to blind and physically handicapped
- Library services to other libraries
- Library services to remote researchers (e.g., Packard Campus for Audio-Visual Conservation Center Remote Restricted Content and Services)
- Library services to onsite researchers (e.g., Packard Campus for Audio-Visual Conservation Center Restricted Content and Services, online products/services)
- Primary source (for researchers)
- National Digital Newspaper Program
- Traditional Library Services (e.g., American Memory, public domain primary source content)
- Visitors services (online catalogs)
- Records, World Digital Library, education, and products (e.g., Thomas, copyright, queryable accessible outreach services)
**Vision & Strategic Goal:** Build the 21st Century Library of Congress Content, Service and Technology Infrastructure for a Networked Environment

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### Strategies

- Convert Library of Congress’s historical holdings to digital form
- Plan, identify, & get “at risk” born digital content through traditional & new acquisitions channels, to include network of public/private partnerships
- Identify & mobilize public & private stakeholders who are sources of digital content to share stewardship responsibilities
- Target state & local content of special interest to Congress & other legislative policy makers; working closely with the Library’s Congressional Research Service & Law Library
- Foster stakeholder awareness of the importance of creating sustainable digital content at the point of creation
- Target networked collaborations with commercial content producers to address the preservation of valuable commercial creative works working closely with Library Services
- Develop & integrate content management requirements into policies and procedures
- Build & use technical capacity for getting digital content
- Recommend changes in the public policy environment to increase incentives to save “at risk” born digital content to ensure long-term accessibility
- Seek wide adoption of digital content information architecture, preservation, & access standards and best practices

- Develop tools for continuous metrics & measures to monitor use of Library digital content and services
- Use customer measures & forecasts to determine digital content access preferences & service usage requirements of target customer segments
- Develop, enhance, & provide customized user-centric information access & discovery tools
- Identify, enhance, & expand access capabilities without compromising information security, privacy, & intellectual property rights management requirements
- Build & implement a national program for incorporating the Library's digital primary source materials into school curricula
- Combine analog & digital materials to create a seamless experience for both onsite and online visitors of all ages
- Collaborate with units across the institution, potential technology and content partners, & other Federal agencies to target & reach the Library’s core online audiences
- Target specific stakeholder groups for their active involvement, collaboration, & support in broadening the Library’s online presence
- Utilize differing delivery mechanisms for content & services to increasingly mobile users with differing levels of technology competency & usability needs

- Build an Enterprise Architecture management foundation
- Manage & sustain business applications by assisting Library programs with services to plan, design, develop, & implement their mission
- Optimize systems operations to ensure a secure, manageable technical infrastructure with maximum scalability & availability
- Build, test & deploy repository systems that ensure secure storage & management of authentic digital content for different content types
- Develop collaborative technical & content partnerships with industry and other organizational entities
- Ensure LC technical environment supports a distributed digital content stewardship environment
- Lead in the best practices in information management within Library of Congress and with our partners.

- Plan, develop, & align financial, & other organizational asset investments with strategic outcomes
- Develop & implement mechanisms that improve decision making & overall operational synergies, flexibilities, and efficiencies
- Develop program & asset performance systems that drive & influence both quantitative & qualitative performance results
- Build a strategic focus in the workforce performance management system
- Develop & implement a performance management system for employees
- Focus on manager core competencies; continuous staff learning; & recruitment for crucial technical expertise from digital media & information technology sectors, & higher education institutions
- Identify training opportunities that support emerging trends & technology and future architecture
- Improve workforce development & recruitment
- Establish collaborative scholarly & executive exchange programs with academia & industry
- Monitor & report annually on workforce, financial, IT, and digital content asset stewardship
- Communicate Service Unit performance results & value contributions internally & externally
## Chart F: Strategic Outcomes 2007–2010

**National Digital Information Infrastructure and Preservation Program**

### Vision and Strategic Goal

Ensure Long-Term Access to a Rich Body of Digital Content through the Establishment of a National Network of Committed Partners

### Objectives

#### Content Collection

**Outcomes**

National Digital Collection

Development of a National Collection of digital Content that is Preserved for the Nation

**Strategies**

- Plan for the Collection and Preservation of Content
- Support Standards and Best Practices for Content Formats and Metadata
- Collect and Preserve At-Risk Digital Content

#### Content Network

**National Digital Content Stewardship Network**

An Organization of Organizations with Varying Roles and Responsibilities for Preserving Digital Content

**Strategies**

- Define the Scope and Context of the Network
- Develop Operations and Functions for the Foundational Network
- Establish and Coordinate a Foundational Network of Partners

#### Infrastructure

**Technical Infrastructure for the Network**

Hardware, Software Components and Technical Protocols to Enable Distributed Digital Preservation Using Shared Tools and Services

**Strategies**

- Develop Shared Technical Solutions, Tools and Services for Digital Preservation
- Promote and Support Standards and Best Practices for Preservation Architectures
- Nurture new Technologies and Research
- Leverage Federal Investments for Digital Preservation Infrastructure
- Leverage Technical Opportunities for the Library of Congress Within the Broader NDIIAPP Technical Environment

#### Preservation Sustainability

**Digital Preservation Sustainability**

Recommendation Pertaining to Long-Term Sustainability of the Stewardship Network

**Strategies**

- Develop Framework for Conceptualizing Content Value
- Document Digital Preservation Business Models
- Investigate Economic Sustainability Issues in Relation to Selected Content Types
- Enhance Incentives for Digital Preservation
- Develop a Public Agenda for Supporting Digital Preservation

#### Public Policy

**Public Policy for Digital Preservation**

Recommendations to Catalyze an Environment to Encourage Digital Preservation

**Strategies**

- Review International Digital Preservation Policies and Laws
- Promote Public Awareness and Education on Digital Preservation Issues and the NDIIAPP Program
- Develop training and Outreach for Digital Preservation Professionals (Workshops)
**Image Credits**


Page 16: Front page of The (Washington, D.C.) Evening Times, Aug. 8, 1900, as viewed in Chronicling America (http://www.loc.gov/chroniclingamerica), a Web site of the National Digital Newspaper Program.


