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Getting Around to Being Strategic

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Introduction

Whether you are an IT director, IT manager, or just a one-person IT department for your library, it's easy to allow the operational aspects of technology to occupy all of your time. You have mission critical parts of your job, whether that means keeping servers, websites, and/or workstations up and running.

Even with the best intentions, what can get lost – what is all too easy to put aside again and again – is taking some time to be strategic about your job, your function (IT), and your department (if you have one). One of the mental challenges of getting around to this can be that being strategic can seem like something that will take a lot of time. There is, after all, a lot that goes into (or can go into) being strategic.

Let's challenge that assumption for a moment: what if you could be strategic in only one day a year? Everyone can presumably set aside one eight-hour day to be strategic. What follows here is an example of how you might organize eight hours – collectively imagined as a single day, although you are much more likely to spread eight hours over several partial-days. If you "never" have time to be strategic, or just don't know where to begin, let's look at how you might invest eight hours as a starting place for being strategic.

Hour One: Meet with your leadership

The IT strategy must align with the broader strategic mission of your library organization. So, the first step is to meet with the library director or the library's board to review strategic documents at the organizational level.

In some cases, it may even be appropriate to review strategic documents at higher levels (like a campus goal for the next 20 years that creates an emphasis on distance education). If a strategic plan does not exist as a formal document, review the vision of the organization with the leadership so that agreement exists about what the larger organization is doing and what is important.

Discuss with leadership how IT fits into this vision. Some questions you might want to start with are: Do existing IT initiatives fit into the vision of what the library is and will be? Are there new initiatives (services, programs, and/or changes in perspectives of service expectation) planned or desired that will have IT implications?

The final important topic to discuss with leadership is the budget. Discuss and make sure everyone agrees what is realistic in terms of financial support of any IT programs – existing or proposed. If the larger budget is not available for you to review, make sure you at least have a clear idea of how large your own budget is and what control you have over allocating it.

Hour Two: Host an open forum

Gathering information from stakeholders (typically internal to the library) will be essential to your process, both to assess how existing initiatives are progressing (and how successful IT support is perceived to be) as well as to flush out ideas for new initiatives.

There are several ways to gather input, and you'll want to select one or more methods based on your organization's size and communication culture. One idea is to host an open forum where library employees can bring their ideas and feedback. Another idea would be to use a short, simple survey to ask for broad input on possible projects and/or broad input on how things are going.

For some libraries, gathering input directly from patrons may be a realistic option – and may even be considered the most important source of data and thus central to the strategic process. The methodologies of gathering data are similar, but it may be worth reviewing data on patron trends (see Hour Four) before asking for direct patron input.

One important thing is that the scope of gathering data should match the scope of the rest of this process. To keep your strategic process manageable, you will want to gather data in ways such that you can realistically use the data to inform your way forward.

Hour Three: Talk to the larger IT department

A library almost always has an affiliated larger IT group that is not part of the library such as an Information Technology Department in higher education, a city or county IT group for a public library, or the main corporate IT department for a business library. No matter the size of your library or the size of this outside IT group your relationship with these people makes a big difference to what you can accomplish.

Make a list of your goals and potential projects including the skills and technology necessary to each. Note which skills you have in the library and how much time is needed for each project. Think about which aspects of the projects and which skill sets are most closely related to the mission of your library.

If there is an IT function that is not specific to a library environment, which is the best IT unit to provide that function? More to the point, are there areas where the larger IT department can help with, or take over, your initiatives? Would this result in a change of service expectations? There are examples of larger IT departments absorbing initiatives like providing a SharePoint instance, providing email and calendaring, providing a dedicated server room, and providing desktop support for patron and/or employee workstations.

For many organizations, the hardest part about this kind of transition would be the change in control – you have heretofore retained control of a service. Partnering with another IT department to provide the service will require having less direct control, and therefore more trust. Since these are business relationships, sometimes a written articulation of service expectations and communication protocols is perfectly appropriate and may ease the transition. This may be a memorandum of understanding or a service level expectation, and may be based on similar documents that the larger IT department has with its other clients. Viewing this transition as a relationship challenge rather than a technology challenge can help you assess the best way to move forward.

Other things to think about are whether there is enough work for a particular skill set in the library to ensure that this skill set is used and kept up to date. Do you have a training budget and is it sufficient to develop or maintain the currency of that skill set? Identify skills that you don't want to or cannot maintain. Look at the larger IT department's organizational chart or their service catalog to see what services they provide. Assess their plans for the next year or few years and look for possible areas of collaboration. Are there areas where your initiatives and theirs are interdependent, or are redundant?

Plan your meeting before you go. Take a list of library technology projects for which the library could use help from the IT department. Specify what kind of skills would be helpful. List identified areas of potential collaboration. This doesn't have to be a one-way street—the library may be able to beta test technology pilot programs for the IT department or take on other projects that would be useful to them. Email your document to the contact before or after the meeting and bring copies with you. Take notes at your meeting and send the minutes to your director and the IT contact to document the meeting. Identify next steps and plans. See if it is possible to set up a regular meeting or if someone from the outside IT department could come to library technology department meetings. Consider offering to set up a financial arrangement if that would be beneficial to both organizations. If the IT department cannot supply support ask for suggestions for outsourcing or hiring a consultant.

As appropriate, Hour Three's activities can be repeated with other groups connected to you -- professional groups, other IT groups, other departments that might have skills that would help you reach your goals.

Hour Four: Review data on patron trends

As one of the key strategists for your library's IT direction, it is important that you keep up with library and technology trends, as if you don't know about new technologies you cannot evaluate their utility. An hour used to review current information and take steps to stay informed in the future is time well spent toward identifying which trends are relevant to your mission and which are not.

Identify several journals, blogs, or other information sources that address your current interests. For journals, set up alerts or have the table of contents delivered to you when a new issue comes out. Some databases provide notifications for new materials from pre-defined searches. Subscribe to blogs and Twitter feeds. You can find lists of library and information science journals in subject specific journal databases such as LISTA, on Wikipedia[1] or the Directory of Open Access Journals.[2] One way to find blogs is to consult the Salem Press directory of library blogs[3]. In addition to the directory, Salem Press gives out awards once a year for the best library blogs. [4]

It is important to keep up with technology in general, not just what has already been adopted by libraries. Even if you aren't aware of a library adopting some new technology it doesn't mean that it might not be of help to your library. To find some good technology people to follow on Twitter, you can search for your area of interest (such as "library technology" or "e-books") under the browse area or identify a list of respected people in your area of interest. When you find someone you think is knowledgeable who tweets, check to see who that person follows on Twitter. Try following a few of those people and discontinue those who do not tweet what is relevant to you.

Other valuable information sources are professional organizations such as Educause[5] (professional organization for technology in higher education), Coalition for Networked Information[6] (an organization with ties to ALA and Educause which focuses on libraries and technology) and LITA[7] (a division of ALA which focuses on libraries and technology). Reports of particular note for academic libraries are: the ECAR (Educause) Study of Undergraduate Technology[8] and the Educause Horizon Report[9] (emerging technology) and reports from ITHAKA S + R.[10] Other examples of potential sources of reports are those from the Pew Research Center regarding technology and internet usage,[11] OCLC's WebJunction site,[12] The Edge Initiative[13] and the Bill and Melinda Gates Foundation.[14] You can put a Google alert on pages where new reports will be announced, or put the date when some reports are expected on your calendar so that you check back at that time to read the report.

Conferences are a great way to keep up to date but many of us don't have the time or funding to attend very many. Even if you can't attend a conference you can often use the information presented. Identify conferences you would attend if you could. Set a reminder for a few weeks after the conference and review materials posted from the sessions. In addition to conferences, you may want to investigate online information from organizations such as the Coalition for Networked Information which regularly posts reports from member libraries on projects.

The most valuable information sources will vary according to your current interests and projects and will change with time. You will never have time to read everything and doing so would not be efficient. Review what information you consume on a regular basis. Does it provide enough information to deserve your time? Does it cover the right topics? It is helpful to make sure that you are following technology trends outside libraries? Do you have enough time for it all? If not, eliminate all but those you find the most informative.

Hour Five: Talk to library IT folks

This hour is the time to develop and assess directions and projects. This is your chance to review the successes and challenges of the last year, assess the time and skills needed for various projects that have been proposed, and identify possible areas of greater efficiency. It is important to do an exercise like this at least once a year.

In a small library this might involve only one person, but for many libraries participation could be much broader. It may be that the only people in the meeting are from the library IT department. The group may include other employees in the library who work on IT but aren't in the IT department or even someone from the main IT department for your city, university, or corporation to add a broader perspective on your projects as they line up with bigger priorities.

Before the meeting, have members of the group review specific trends. Ideally these trends or subjects will be aligned with the person's areas of expertise or responsibility. Within their trend, each participant should evaluate existing services and note what services can be improved or eliminated; evaluate the projects from the past year with a brief summary of how the project went; and list potential projects with information about the resources and skills necessary to complete those projects and what kind of impact each would have on library services. The participants should use any kind of data available such as web analytics or help desk tickets in their evaluations. These evaluations should be posted to an intranet or shared document area (such as in Google Docs) before the meeting.

Identify what worked well and not so well for previous projects and current services. Use this information to improve work for the next year. Have each person in the group give feedback about how the existing and potential projects should be prioritized.

When this exercise is finished it should result in a list of potential products with information about impact, and required skills and resources.

Hour Six: Think

Consider where easy wins might be possible. You have assessed the most important projects in terms of return on investment. Consider options for outsourcing some tasks or parts of projects.

Make a list of possible projects for the next year. Make a matrix with room for rating each project in terms of several variables - variables that are important to your organization. Examples might include alignment with library mission and/or strategic plan, direct financial cost, human time cost, and importance to users. Rate each project, reflecting the viewpoints of the entire organization and your users. You can consider your time and/or budget in different ways such as making sure different areas of the library each have at least one IT project in the next year or allocating a certain percentage of time and money to Research and Development—

in other words, to new projects. It is important not to spend all of your resources on maintenance activities or you will never develop new services.

Some of your projects will naturally rise to the top, especially those that will get the biggest result for the amount of resources allocated. Add details to these projects in terms of which skills are needed, how long the project should take, should it be outsourced or handled in house, and the necessary financial commitment. Match human, technology and financial resources to projects. Keep a list of obstacles and missing skills and/or technologies so that you can refer to these when planning training, hiring new personnel, or making adjustments in the organization.

Hour Seven: Prioritize

This should naturally lead into a prioritization process. You should identify what your process will be, and who will be included in it, and then be up front and clear with stakeholders about how this will work so there are no surprises to anyone.

Typically, prioritization of services and projects should be done in collaboration with existing decision-making structures – the director, other IT stakeholders, department heads, etc. How this might work will vary considerably by organization and who should and wants to participate. It is important to realize that the ultimate value of your entire process will be somewhat limited if you cannot get your existing decision-making structures to participate in a prioritization process.

How simple or elaborate your resulting matrix of approved and potential projects may be will similarly vary by the size and nature of your organization.

Hour Eight: Communicate

Once decisions have been made, the next step is to communicate with stakeholders about how services and projects have been prioritized. Again, it is best to imagine how this communication will take place relatively early in the process so that you have an idea of what you are building toward and thus what aspects of your prioritization matrix might be easily reused to ensure clear communication.

Communication can take many forms, and may actually take different forms for different groups of stakeholders. In some cases, a passive communication may be appropriate: posting a priority list or matrix to a website or collaboration tool so that interested parties can access it when they like. In other cases, and especially with stakeholders who are more engaged or whose work may be directly impacted by new or eliminated projects, more active communication may be better: sending a personal email, holding individual meetings, and/or holding group sessions (e.g. with a board of directors or with the IT department) to give participants a chance to ask questions and have dialogue about the priorities.

After eight hours

This process should yield valuable tools and information for prioritizing, evaluating, and communicating IT work in the library, allowing the library technology department to move beyond daily maintenance and work strategically. While the suggestions here are structured around eight hours of planning, in reality this process should be ongoing and may not involve all of these steps in the order described here. The specifics of your library's situation will inform how you may adapt this framework to your own needs.

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