Tech Planning in 90 Minutes

Twitter: @CarsonBlock
http://www.carsonblock.com
Really?
Tech planning in this short of a session?

Your goal: find one or two *great* takeaways. Take more for bonus points!
...and with the rate of change, why bother planning anyway?
Why is a Technology Plan important?

The process of technology planning has two complementary advantages:

• You can produce a document to guide and help manage the technological efforts of your library
• The process itself has tremendous value.
What should I know before starting?

• The process can be as fast or slow as you like.
• You can't do it alone.
• Great models exist, but it's up to you to customize an approach that will work best for your library.
Then there’s this:

“...I have always found that plans are useless, but planning is indispensable.”

–Dwight D. Eisenhower
Goals for Today

• Our style is casual, interactive & collaborative to create impact for you
• Gain an understanding of planning principles and techniques (not everything – but the key things)
• Adaptable “cookbook” approach – not a rigid instruction set
• Take notes as inspiration strikes!
• Time to Practice, Interact & Iterate
• Bring home something you can *really* use to move forward
1. Mini Inventory: Who do you serve? Who are your stakeholders (external & internal)?

2. Mini Inventory: How are they served?

3. What is your vison for....
   ...your institution?
   ...your department?
   ...your tech plan?
Meet me! Carson Block

• Who I am
• What I believe
• What I do
I want to meet you!

• Higher Ed Libraries?
• Public Libraries?
• School (K-Libraries)?
• Special Libraries?
• Others?
Choose good models for your plan

• **Process model:** These are the nuts-and-bolts steps, hopefully in sequential order, to the technology planning process. This course represents one approach to the process, but there are others that may suit your needs better – either by simplifying the process, or by suggesting more nuance.

• **Document model:** What do you want your final document to look like? An easy-breezy read for your board and public, a detailed technical document to guide the nuts and bolts of the work. Maybe both? Or something in-between?
Although your steps will be based on your specific model, there are some tasks common to most planning processes:

- Meetings
- Research
- Compilation
- Writing
- Reviews and Approvals
- Communications (along the way, and at the end of the process)
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Who do you serve? How Do You Serve Them?
A closer look at your ILS
How well is your ILS working for you?
Sidebar: Not sure where to start?

Library Technology Guides

• [http://librarytechnology.org/](http://librarytechnology.org/)
Work at Your Tables!
What is the vision for:
...your institution?
...your department?
...your tech plan?
Identify institutional Vision and Mission
Optional Activity: Does your IT Department or IT help have a vision or mission statement? Probably not – at least not committed to paper.

If no, try these questions:
• What is the role of technology in our library?
• What is the IT department’s role in meeting library (user) needs?
Create Technology Plan Vision Statement

• Tip: dream big, say it simply.
• Examples:
  • “Our library will lead the bleeding edge of libraries in the country in terms of technology.”
  • “Our library will be the go-to resource for information literacy in our community”
  • “Our library will use technology wisely to serve our community.”
  • “Our library will increase its technology knowledge and competencies.”
Work at Your Tables!
Sidebar: Determining the scope of your plan

Here are a few elements common to any approach to defining scope:

• Scope should reflect other strategic plans in process (what else are you doing in your library, and how does this support and/or fit?)

• Scope should reflect actual implementation time for the overall plan (how much time are you allowing to accomplish the plan?)

• Scope should include guidelines on how many high-level objectives can reasonably be accomplished in the time frame (what broad areas do you know you want to target?)
Dreaming and Grounding

You can do both at once!
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<th>What's working well? (don’t lose it!)</th>
<th>What could be improved? (Make it better)</th>
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Dreaming and Grounding Exercise

One method is asking the group three questions and dynamically capturing the discussion on a white board:

1) **What is our current experience with technology?**
   
   *Technology is...*

2) **What could we improve?**
   
   *We want to continue to implement technology that...*

3) **What is our wish for the future?**
   
   *We want technology that...*
Work at Your Tables!
Let's assume the simplest situation for now - two groups of users: patrons and staff. As part of planning, you might consider asking these users a couple of questions:

• How does well do the library's computers serve your current needs?
• Are you able to find what you want on our web site?
• What can we do to serve you better?
• What new technology support might serve you in the future?
• What else would you like to know?
• Survey design tips – [http://lrs.org](http://lrs.org) and others
5. Ideas for actions:

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<th>Working Well – keep it up</th>
<th>Areas to Improve</th>
<th>What’s happening elsewhere &amp; how does it apply (tech, society, library services, “future” etc.)</th>
<th>Check in with vision – what should we be doing?</th>
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What’s Next: From “Buckets” to Goals and Actions

• Buckets: Ideas that have some similarity & can be grouped together

• Goals: high-level statements reflecting the Buckets (as you’ve organized them)

• Actions: Refinement of the ideas in your Buckets. Often you can combine several ideas into one action or similar set of actions.

• Timeframes and responsible parties: Don’t skip this in your actual plan!
Although your steps will be based on your specific model, there are some tasks common to most planning processes:

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Thank You!

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