VIP Team Report To ISD Staff On
The Results Of ISD's Visioning Exercise

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Introduction

In January of 2006 the Vision Implementation Project (VIP) team submitted a proposal to the Information Services Division (ISD) management recommending that the VIP team lead ISD staff through an "Envisioning The Future" exercise. ISD management determined that elements of this proposal could be incorporated into ISD's strategic planning process.

Over a period of several months, ISD held a series of meetings designed to help ISD get a clear picture of where it has been, who it is now, and where it is going. This included a discussion of what ISD's goals were in 2000 and a look at what has been achieved since then; several meetings dedicated to taking an inventory of what ISD does now; a meeting led by Kelly O'Brien of Turning Pointe, designed to help ISD clarify its identity; and a visioning meeting led by the VIP team.

The visioning meeting was a three-hour exercise that took place on June 29, 2006. (The meeting agenda is included in Appendix A.) This document, a summary and analysis of the results of the visioning meeting, is a report to ISD staff. It includes:
1. A summary and analysis of the information industry trends that were discussed at the meeting and their impact on ISD;
2. The results of an exercise in which staff was asked to articulate some aspect of what ISD might be doing in five years;
3. Summaries of related discussions that occurred during and in support of the visioning meeting.

Trends and Impacts Discussion Summary

In preparation for the "Envisioning the Future" exercise, ISD staff read a variety of articles that discussed prevalent information-industry trends. One article was assigned to each of five small groups. (For a list of articles, see Appendix B.) The small groups reported back to the entire staff by identifying future trends described in these articles and their potential impact on ISD. When multiple articles emphasized similar points, these findings indicated a recurring theme. The following represents the VIP team's compilation of the staff comments and the resulting themes that developed.

In the future, ISD anticipates facing a customer base with higher expectations for information services. This new customer base will be fluent users of information technology and fluent multitaskers. They will also be socialized towards a collaborative, networked environment. The rate at which ISD will need to change will be determined by the ages of its customers.

Collaborative partnerships will become increasingly important for ISD at a variety of levels. In addition to developing partnerships with peer organizations, there will be a growing need to collaborate with other parts of NIST. ISD will need to seamlessly integrate its resources and services into the workflow of NIST's researchers. In this way, ISD will retain visibility within NIST. On another level, ISD can play a role in facilitating the collaborations of NIST scientists that occur both internal and external to the organization.

How ISD interfaces with its customers is being transformed. The role of the Research Library as a physical destination for accessing resources is diminishing. While some customers choose the Research Library as a quiet place to work, customers are much more likely to interact with ISD and its resources virtually. ISD will need to increase its outreach efforts in order to stay in touch with its customers. There is a trend for libraries to reallocate their physical space in order to create social gathering places, communication centers, and IT labs.

ISD's role as an "information gatekeeper" looks different than it has in the past. The large quantity of easily-accessed information that is now available to its customers creates a role for ISD as an information filter. ISD becomes responsible for collecting *appropriate* data and selecting *targeted* information services and products. Assessing the quality of resources becomes increasingly important.

At the same time, researchers are less likely to use the information gateways provided by libraries and publishers. The trend towards relying on validation through the wisdom of the masses rather than an authoritative voice is gathering momentum. The underlying belief that information should be "free" has resulted in a movement towards open access publishing and peer to peer distribution of research results. These activities decrease of the impact of the more traditional information mediators.

ISD will be required to create new ways of disseminating information. Customers will demand more personalized and user-centered interfaces to ISD's resources, and they will place greater requirements on ISD to meet them at their point of need—in any form, wherever they are.

Movement away from printed media will continue and the traditional structure of books and journals may disappear completely. ISD needs to be ready to handle large data sets. Meeting these enhanced needs will likely require an electronic repository.

Within ISD there is an awareness and concern for the fast pace of change in the information industry. Inability to keep up with, for example, the changes in electronic scholarship, could render ISD irrelevant. ISD will need to continue its discussions with its customers, find new ways of conversing, and use the data it collects in new ways. ISD will also need to increase the speed at which customer feedback is assimilated into services.

Because resources are limited, ISD will need to make clear decisions about what services it will not provide in the future and make choices about who to target as its primary customers. ISD needs to make good decisions, based on environment and user analyses, when making budget priority decisions, deploying new technologies, and abandoning old technologies. Contributing to this challenge is the often conflicting preferences of different generations of customers.

Exploring Future Scenarios

During the last part of the visioning exercise, teams were re-formed and provided with a question which underscored potential future visions. The year 2012 was specifically selected as a mid-term target, given the rapid rate of change within the information industry. The teams were asked to consider how ISD's services and environment will be impacted by the trends discussed earlier in the exercise. The questions were designed to be open-ended. There were no "right" or preconceived answers to these questions; their purpose was merely to stimulate thought and discussion about the future. As such, each team's response provides a creative answer and analysis of the situation at hand. The questions and corresponding staff responses are provided below.

Question 1: Identify one service ISD currently provides that it will still provide in 2012. How will it look different to the customer? How will ISD's work change to support these differences?

Marketing and advertising services and capabilities will continue to be a significant activity for ISD staff. However, the manner in which these activities are undertaken will be changed. Marketing will be more interactive in nature, creating a more collaborative union between ISD and the customer. For example, users could provide feedback and suggestions for ISD services using wikis or other virtual spaces. The dialogue between ISD and the customer will provide the impetus for innovative ideas. Through the existence of this interactive forum, ISD will market resources and services. Potentially, this type of forum might offer a long-term replacement for the *ISDirections* newsletter.

In addition, the future vision for marketing and advertising services projects that ISD will be able to customize "messages" and interfaces through this virtual space. This would allow more targeting of services for individual users, further developing and enhancing ISD's relationship with its customer base.

Question 2: What will ISD's physical public space look like in 2012? What will occupy a majority of the space? What will no longer be there?

ISD's physical space of the future will stimulate more opportunities for collaboration. For example, the lines of tables currently in the Information Commons area will be replaced by temporary walls that allow for separate, but intimate meeting spaces. These "walls" will be largely made of glass or see-through materials. The use of glass will also extend to the ISD staff areas in order to emphasize the sense that there is little separating the Division and its customers. The environment will be more casual and inviting, through the use of amenities such as a food center and comfortable furniture. This atmosphere will extend to a greater use of the outdoor patio areas, as well, making the Research Library more representative of a campus environment.

Since 2012 is only a few years in the future, it is unlikely that the Research Library will have eliminated its print and book collection entirely. However, it is possible that the microfiche readers and other more obsolete technology hardware will have disappeared. In addition, given

the increasing proliferation of wireless technologies, there will be more accessibility to handheld devices and scanners in the Information Commons area. Conference and meeting areas will also be equipped with more technology features and offer additional outlets for electronic devices and chargers. Many more library customers will be using their own personal devices such as I-Pods or the like. Seeing individuals working while wearing earphones will be a common sight.

The circulation area is likely to experience significant change by 2012. A physical circulation area may not even exist. Badges will not be the identification method used to record books checked out from the Research Library; fingerprint scanning will be used instead.

Question 3: *In 2012, how will ISD evaluate its level of success? What measures will ISD use? How will they be different from ISD's current measures?*

One of the main measures of success will still revolve around customer satisfaction with ISD resources and services. Customer surveys will continue to be exploited. ISD Web sites might include an "easy button" where customers could push "yes" for satisfied and "no" for not satisfied.

Usage of electronic resources will also be a significant measure of success. Data collection efforts for journal and database usage statistics will become increasingly important. In addition, the availability of collaborative tools within both the physical and virtual space will provide other avenues for measuring usage. The knowledge of both *how* and *how often* these collaborative spaces are used will be a valuable analytical tool for assessing how successful ISD is in meeting customer needs and expectations.

Question 4: *Describe one primary service that ISD is not providing now but will provide in 2012. How will ISD provide this service? How will researchers interface with this service?*

The service selected for this analysis and discussion was mobile access. As the number of mobile devices burgeons, users must be able to interface with ISD and access all content. Providing data in formats suitable for these types of devices will be a continual challenge.

Another potential new service for ISD is to act as the authoritative approving body in the social publication process. For example, a proposed review process might look as follows:
- Collaborative groups review articles and resources in subject areas relevant and of interest to NIST staff. These groups make their comments and provide the reader's feedback on article and resource content.
- ISD then filters the top recommendations from the collaborative group.
- These recommendations are made available as a "reader's list" for users, with data analysis conducted in a manner consistent with the social publishing model.

Question 5: *In 2012, will publishing look different as more authors choose to be part of collaborative groups and peer reviews? How will the way articles are distributed change? What will ISD's role be?*

It is likely that the Internet will be used for central pre-publishing review. Personal publishing activities will increase, with editing and review being conducted by peers. Specialized publications will be shared amongst peers in a more collaborative way. ISD will have the role of acting as an information advisor and providing supporting web services to conduct these types of activities.

The increased appetite for access to topics of interest will result in daily and even hourly updates and publications. As access becomes increasingly mobile, publishers will provide content in different formats to accommodate mobile devices. For example, blogs will be made available via cell phones, PDAs and other devices. Copyright issues will become progressively more complex as these social publishing and varied format/device issues advance.

Related Discussions

Identity Discussion

The purpose of the "Envisioning the Future" exercise was to capitalize on the momentum gained from the "ISD Identity" meeting held on June 6, 2006. In order to refresh ourselves on the findings from that previous meeting, VIP staff provided notes on some of the "ISD Identity" meeting highlights. These notes included a synopsis of Kelly O'Brien's definition of organizational identity, as shown below.

"What is Organizational Identity?"
- What you do, offer, provide…
- People
- Culture – "Walk the walk", not "Talk the talk"…
- "Look and feel"
- What you stand for: "magnetic north"
- Evolves

VIP team members analyzed the notes taken from the "ISD Identity" meeting, including those compiled by both Mary-Deirdre Coraggio and Kelly O'Brien. These findings were broken down into those themes which were consistent across many staff responses and those themes which appeared to be in conflict. These notes are presented below.

Consistent Identity Themes:
- Customer focused
- Good value ("bang for the buck")
- Respected/trusted
- Essential to NIST
- Accessible
- Straddling the past/future
- Adaptable
- "Go the extra mile"
- Not large and impersonal

Conflicting Identity Themes:
- Innovative vs. Safe
- Competent, professional vs. well-liked
- Luxury model vs. practical model
- Clearly defined expertise vs. whatever the customer wants us to be

Impetus and Barriers for Change

In order to facilitate unconfined thinking during the final exercise, ISD staff was asked to identify those factors forcing change upon ISD as well as those barriers impeding the Division from making progress. The results are presented below.

What is Pushing us Forward:
- Technology – this was a recurring comment and observation
- Changing expectations and <u>fast</u> access for users
- Good customer satisfaction – recognition that we provide different services increases our drive to provide more
- Commercial competitors and other information providers
- NIST management mission – showing we have impact, need to remain relevant
- Sense of adventure and fun – pushing forward keeps things interesting
- Enthusiasm generated by leaders

What is holding us back:
- Budget limitations
- Lack of user awareness of our skills, services and capabilities
- Time limitations
- Expertise/skills/training
- Keeping up with both old and new services
- Lack of technology – don't have the tools to push us forward
- Vendor policies
- Administrative rules/red tape/bureaucracy
- Administrative workload – ex: writing and re-writing reports
- Staff time limited – no time to learn new areas
- Conflicts of innovative vs. safe
- Trying to do everything that the customer wants
- Lack of information about rules for innovation – need to know the parameters of what's acceptable within ISD
- Not keeping up with changing marketplace (administrative)
- Cultural inertia
- Clearly defined expertise vs. whatever customer wants

Exercise Feedback

Participants were asked to provide feedback on the "Envisioning the Future" session in order to help the VIP team plan for future exercises. The following is a summary of the comments:

Successes:
- Pre-assigned reading allowed staff to come prepared
- Small groups a plus
- Liked mixing with different people across the organization
- Eye opening to hear different ideas from others
- Helped to having someone interpreting and analyzing the discussion
- Like the format and pace
- It was fun, good food

Opportunities for improvement:
- Three hour chunks of time is too long to abandon our customers
- If staff types up the reports on the articles in advance, there would be less scribing and we would save time.
- It would be helpful to get input from people outside of ISD by including them in the discussion. Examples include: Kelley O'Brien from Turning Pointe; NIST researchers; RLAB; and other libraries.

Appendix A: Visioning Meeting Agenda

ISD VISIONING MEETING
Thursday June 29, 2006
9:00 am – 12:00

Objective
The VIP Team's hope is that the exercise will result in a shared understanding of where ISD hopes to be in five years. Added benefits are that the exercise will enhance the staff's environmental awareness and create an additional opportunity for staff to join the discussion of what "being relevant in the future" might look like. From this vantage point, ISD staff is better equipped to evaluate what is significant to our organization and ultimately, contribute feedback into which directions ISD should invest its limited resources.

Perspectives to Keep in Mind
- Consider ISD in five years.
- Define high-level outcomes or end results, not methods and tactics.
- Suspend assumptions about what is feasible.
- Have fun!

Schedule

Time	Activity
9:00 – 9:05	Welcome
9:05 – 9:15	Meet with assigned group to finalize how the group will report out on its reading assignment.
9:15 – 9:40	Reports and discussion of articles.
9:40 – 9:55	Review "Identity Meeting"
9:55 – 10:25	Brain dump: What's pushing us forward? What's holding us back?
10:25 – 10:40	BREAK
10:40 – 11:15	Create future pictures for ISD (in small groups)
11:15 – 11:40	Report out on previous exercise
11:40 – 12:00	Closing discussion

Appendix B: Assigned Readings

Article: Research Libraries Engage the Digital World: A US-UK Comparative Examination of Recent History and Future Prospects by Clifford Lynch (from *Ariadne*); Feb 2006
Location: http://www.ariadne.ac.uk/issue46/lynch/

Article: Born with a Chip by Stephen Abrams and Judy Luther (from *Library Journal)*; May 2004
Location: http://www.libraryjournal.com/article/CA411572.html

Article: Trendbriefing: InfoLust (from Trendwatching.com)
Location: http://www.trendwatching.com/trends/infolust.htm

Article: Upstream (from Sirsi/Dynix Institute); 2005
Location: http://www.sirsidynixinstitute.com/Upstream/Archive/Files/upstream_200501.pdf

Article: FutureFacts: Information Industry Outlook 2006 (from Outsell)
Location: S:\ISD_Common\VIP\Articles\OSHotTopicsV1091905FutureFacts.pdf