SIL Vision

SIL creates a compelling environment for connecting, collaborating and exploring across disciplines and information boundaries
SIL enhances and eases the discovery of information in our collections for SI scholars, researchers, scientists, and the larger world of learners
SIL understands and meets user needs, serving users where they live and work
SIL builds expertise on information discovery, navigation and management

SIL Values:

Excellence in process, procedures, and services
Experimentation / Innovation / Creativity / Flexibility
Responsibility (in our personal actions; corporate actions of stewardship of resources and collections)
Collaboration
Continuous improvement by ongoing learning for individual and organizational growth

Background

SIL Strategic Planning/Strategic Thinking 2008-2009

Libraries and librarians find themselves in interesting times. We need to maintain print collections of great age, value and rarity, at the same time we need to be on the web—to license information, to create digital products and to be active participants in a networked world.

In 2008, SIL began a 12 month planning process. SIL Director Nancy E. Gwinn sought a strategic plan that demonstrated and fostered the Libraries’ leadership role as information broker in an era of rapidly-changing technology, while aligning the SIL with the goals and mission of the Smithsonian Institution. SIL hired Lou Wetherbee as a consultant to assist the Libraries by working with a wide group of staff, researchers and other interested parties. Mary Augusta Thomas (MAT) served as the coordinator onsite for this effort.

Consultants Lou Wetherbee and Susan Loving led a SIL Town Hall discussion on March 25, 2008 in Baird Auditorium. Ms. Wetherbee explained to staff what we might expect of the planning process during the coming year and engaged those present in an interactive exercise to identify issues of concern for the SIL. Next steps included submitting a survey to all staff about concerns and issues, conducting “environmental scans,” and planning additional all-staff meetings.
From the beginning, the entire SIL Advisory Board participated in the planning process. The Board formed a Strategy sub-committee that met with the consultants and gave feedback at all stages. One Board member, Hope Furth, served on the library steering committee, participated in conference calls and travelled to DC to meet with the Steering Committee several times.

A second SIL Town Hall meeting was held on May 6, 2008, and produced a number of good ideas for the SIL Steering Committee to use in the planning retreat in July. Since feedback for library staff was very positive, Lou Wetherbee urged the Steering Committee to use new tools and try new techniques to generate creativity. These included the first SIL YouTube videos. The idea was to learn as we went along so that by the conclusion of the process, SIL would already be employing a number of new skills.

Four environmental scans were conducted by SIL staff. Their work included: Communication and Outreach, Customer Review, Current and Emerging Discovery Tools, and Training and Staff Development and. These scans formed the areas that were the center of a two day planning retreat in July.

Throughout, SIL staff participated in brown bag lunches and guest lectures on the future of libraries and Web2.0 technologies. For example, in May, staff heard a presentation from the National Geographic Society library staff on the various initiatives they are taking to explore and experiment with new web 2.0 technologies and to promote the library use with the staff.

The SIL Planning Retreat was held Wednesday July 16 and 17, 2008. Participants from the staff, the SIL Board, and key SI stakeholders: Anne Van Camp, SIA, Ann Speyer, OCIO, and Carol Neves (OP&A), identified four core strategies and a number of possible initiatives. Everyone worked under the principle that 20% of our enterprise should be spent on keeping things going and 80% should be spent on things that move the Libraries toward its goals. Succession planning and the need to help staff develop appropriate skills were among the topics discussed, and the group in general had a strong customer focus. Here are a few reflections of the day and a half from attendees:

“That experience motivated me, as a board member, to seek out [a] more interaction with the staff to deepen my understanding of the issues and [b] opportunities to stay involved in the development of this strategic plan.”

“The cooperative generation of meaningful ideas, with everyone contributing and no one to dominating, was truly amazing. We are on our way to producing a document which enable the libraries to move in new directions, utilizing evolving technology, improved communication and our outstanding staff. This is a rare achievement.”
Based on the environmental scans prepared by SIL staff, and informed by discussions at all staff meetings, we divided into four groups and created the first draft of core strategies to help SIL in the next few years.

With a wealth of information gleaned for these events, from August 2008 to January 2009 a writing team drafted text that was revised many times. In October, a working draft was sent to library staff and stakeholders for review. Three focus group sessions were held at the end of October and additional input solicited by e-mail. The draft was heavily revised as a result and presented to staff repeatedly. The Consultant(?) lead several meetings of the combined steering committee and writing group to articulate the basics and discover the clearest way to express what needs to happen now and in the future.

On March 4, 2009 the document was presented at a Town Hall which featured a consultant-facilitated discussion of how we fill in the next steps with ongoing work and with new ideas.

The final plan focuses on service to both our internal and external users. We seek to provide a collaborative atmosphere and to actively engage with researchers and the public through on-site and web communities. We want to continue supplying information sources that are critical to SI work while bolstering interdisciplinary efforts.

By the last third of the SIL planning process, the SI strategic plan process began. SIL staff was happy to note that the two seem to have similar methods and we are confident that the SIL plan will support the goals that are being outlined by the Secretary.

**Lessons learned:** For a plan to have validity, we needed to be open to ideas and opinions from everyone on the libraries staff as well as external stakeholders. Asking for feedback in a number of different ways was crucial as we incorporated the words people used in to the planning documents and process.

SIL sees our plan as a springboard for actions. As we learn more, we will make changes and add new initiatives. No one plan answers all the needs of all audiences. SIL will have versions of the plan for the public/fundraising and publicity. A different version of the plan is already a working document for each library department. We will develop a board version for their use in supporting SIL.

We want to keep the staff plan at least as a work in progress, with changes made as we learn more in undertaking initiatives. Staff will have an opportunity to report on their implementation projects several times a year and in different forums. Not only will this track action it will also, we hope, encourage the staff to opt – in to trying some of the initiatives in new ways.

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**GOAL 1** **COLLABORATING ACROSS BOUNDARIES**
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<tr>
<th>STRATEGY 1.1</th>
<th>SIL creates a compelling environment for connecting, collaborating and exploring across disciplines and information boundaries</th>
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<tbody>
<tr>
<td><strong>INITIATIVE A:</strong></td>
<td><strong>Position SIL as a center for research activity with physical library and virtual research content environments that promote collaboration</strong></td>
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| **NEXT STEPS** | Create collaborative space (both virtual and physical) in each future library project.  
Develop training on using online citation management\(^1\).  
Take advantage of opportunities to consolidate library space. |
| **INITIATIVE B:** | **Situate SIL internally within SI as the center for networking and exchange of ideas** |
| **NEXT STEPS** | Publicize information about SIL in SI newsletters, publications and online content.  
Encourage SIL staff to promote SIL services to colleagues/departments through informal means such as “elevator” speeches and casual conversations.  
Identify unique anniversaries and events in specialized fields and share among SIL staff. |
| **INITIATIVE C:** | **Adopt new technologies to remove boundaries, encourage collaborative research, and include users in the process** |
| **NEXT STEPS** | Explore which web applications and technologies (including social networking) are best suited to promote collaborative research and quickly start using them in beta.  
Distribute newly acquired books lists or updates to digital collections via RSS feed.  
Collaborate with users to put up content of interest to them, and host their locally developed content in a webcast of the month.  
Discover the best way to introduce next generation communication tools.  
Work with OCIO to update Cross Search to reflect the needs of our users. |
| **INITIATIVE D:** | **Extend outreach and collaboration by enhancing existing and forging new relationships between SIL and other SI units as well as local institutions** |
| **NEXT STEPS** | Work with Smithsonian Affiliates, Smithsonian Associates, and Smithsonian Center for Education and Museum Studies and other units identified.  
Collaborate with local universities, libraries and institutions to increase SIL visibility. |

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\(^1\) [http://www.refworks.com](http://www.refworks.com) is how SIL tracks SI research output, while [http://www.endnote.com](http://www.endnote.com) is offered by SI
Participate in museum and scholars groups throughout the institution to better understand the information needs of SI Scholars.

**INITIATIVE E:** Create ways for SIL staff to make their areas of expertise (e.g., information fluency and information organization) accessible and better known within SI

**NEXT STEPS** Create a staff directory by utilizing web 2.0 tools such as SlideShare,\(^2\) where presentations and publications by staff can be posted and shared. Encourage staff to participate in SI wide committees in order to participate in the exchange of ideas and collaborate across the institution. Put staff pictures, buddy icons or avatars on the branch pages.

**INITIATIVE F:** Make SIL one of the first points of contact for newly hired employees by inserting SIL into employee orientations

**NEXT STEPS** Contact SI Human Resources with a proposal for SIL participation in employee orientation to introduce services and resources early in a new employee’s career. Provide targeted orientation to various sub-groups.

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<th>STRATEGY 1.2</th>
<th>SIL exchanges information and fosters interdisciplinary research nationally and internationally</th>
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**INITIATIVE A:** Develop a Web of SI Research that fosters interactive research networks

**NEXT STEPS** Approach SI offices including the Chief Information Officer, SIRIS Community, Office of Policy and Analysis along with the international library community to determine interest in participation and cooperation. Using data from surveys of users’ research partners/familiarity with web 2.0 tools, set up testing panel.

**INITIATIVE B:** Create a Technology Advisory Group (TAG) to discuss innovative ways to exchange information

**NEXT STEPS** Determine makeup of TAG (SIL staff, board, private sector), set mission of the group, and prioritize tasks. Involve SIL Advisory Board expertise and connections.

**INITIATIVE C:** Develop SI Research Online\(^3\) as a site to provide access to all SI produced content

**NEXT STEPS** Continue to work with SI Scholarly Publications to deliver past and current SI scholars’ research. Collect and make available products of SI research in the Digital Repository.

**INITIATIVE D:** Collaborate to make SI scholarship available worldwide

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\(^2\) [http://www.slideshare.net/group/smithsonian-libraries](http://www.slideshare.net/group/smithsonian-libraries)

\(^3\) As a new product to include the SI Digital Repository and SI Research Bibliography, etc. ([http://research.si.edu](http://research.si.edu) [http://si-pddr.si.edu/dspace/](http://si-pddr.si.edu/dspace/))
NEXT STEPS
Enhance exchange programs. Provide opportunities for international scholars, fellows and interns to work with SIL staff.

INITIATIVE E: Expand and improve SIL’s contributions to the Biodiversity Heritage Library (BHL)
NEXT STEPS Promote BHL content via presentations at national and international library and scientific professional groups. Collaborate with BHL content users to improve quality of metadata and presentation of content.

GOAL 2 DISCOVERING INFORMATION
SIL enhances and eases the discovery of information in our collections for SI scholars, researchers, scientists, and the larger world of learners

STRATEGY 2.1 SIL builds partnerships with other individuals and departments in the Institution who are developing an SI-wide digitization strategy

INITIATIVE A: Enhance the SIL digital infrastructure for both the creation and presentation of digital content
NEXT STEPS Form an SIL working group to participate in the use of the SI DAMS⁴, and in SIRIS Cross Search Center for image storage and access. Identify and access new funding sources for digitization efforts. Complete and publicize SIL digitization strategic plan and participate in SI-wide digitization strategic planning⁵. Suggest staff to SI Senior Management to serve on SI wide groups that are planning web content and strategic planning. Reorganize the branch pages with a discipline-focused approach.

INITIATIVE B: Enhance the metadata associated with SIL web content to increase and facilitate findability of SIL digital resources
NEXT STEPS Raise ranking of SI data in web search results. Experiment with user-generated tagging to complement controlled classification schemes. Begin user testing of existing SIL web pages to evaluate how our users discover information.

STRATEGY 2.2 SIL increases awareness of SIL content and expertise through rapid prototyping⁶ of discovery tools and new technologies

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⁴ Digital Asset Management System
⁵ The Smithsonian is currently creating a digitization strategic plan with a deliverable date of October 2009. Additionally, all units are required to create unit level digitization plans
⁶ http://usabilitynet.org/tools/rapid.htm has a good summary. Quickly developing interactive software/hardware prototypes that can be evaluated and further refined based on user requirements and feedback.
INITIATIVE A: Experiment with emerging technologies to develop content that engages participants and users

NEXT STEPS
- Investigate the use of toolbars and/or plug-ins for web browsers and select an appropriate application(s) to provide direct access to Library catalog.
- Experiment with the use of social bookmarking for organizing frequently used reference materials, databases.
- Initiate beta project where researchers can identify, organize and share most frequently used materials.
- Identify three practical ways to measure the results of experimentation with collaborative content and discovery tools for users.
- Define, identify, and develop a ‘resource discovery system’ for SIL assets (next generation SIRIS).

INITIATIVE B: Experiment with new, faster means of delivery of resources to users

NEXT STEPS
- Expand the use of scanners for in-house document delivery beginning with three branches (CHNDM Library, HMSG Library and Botany/Horticulture Library).
- Explore alternate delivery systems of physical items.
- Set up special accounts with vendors and create means for patrons to purchase articles from publishers using own funds via purchase-on-demand.
- Develop interface that allows users to search SIL’s catalogs, online journals and databases in an integrated search.
- Investigate areas where workflow efficiency can be achieved (e.g. time it takes from request for purchase, to receipt, to cataloged, to shelf).

STRATEGY 2.3 SIL builds, sustains, protects, and shares world class collections, making decisions about acquisitions and preservation of print and digital collections informed by a deepening understanding of users’ current and future needs

INITIATIVE A: Identify and highlight hidden SIL resources and collections

NEXT STEP
- Create a “Hidden Gems of SIL” feature on SIL blog to reveal collections, push out through web 2.0 tools, posters in relevant branches, emails to interested staff.

INITIATIVE B: Align SIL collection development and distribution of SIL resources and staff with SI research priorities and directions

NEXT STEPS
- Experiment with a “Recommend Titles to Purchase” function on the Library Catalog or Webpage.
- Meet regularly with core user groups to learn about changing information needs.
Analyze circulation, ILL, and subscription database usage data to identify research trends and subject areas that need either enhancing or weeding and to evaluate material and work force expenditures.

**INITIATIVE C:** Fast track digitization efforts to aid preservation and access, especially of rare materials

**NEXT STEPS** Create a SIL-wide priority list of rare materials in need of digitization and preservation.
Create a scan-on-demand service, whereby general collections materials are sent to mass scanning facility.

**INITIATIVE D:** Explore means by which SIL could take a role in the future research data storage needs of SI

**NEXT STEPS** Find a partner in SI to test storage of researcher generated multimedia files.
Use SIL location at Pennsy Drive to test ways to improve how SIL maintains and accesses collections in an off-site facility to support current research priorities.

**INITIATIVE E:** Ensure the future use of our collections by preserving information for continued accessibility

**NEXT STEPS** Collaborate cross-institutionally with SI conservation staff and internationally through a conservator exchange program.
Devise and implement a Preservation internship program for book conservation and library preservation students.
Recruit volunteers from VIARC to assist in SIL Preservation initiative.
Become a center of expertise on the exhibition of the book.

**GOAL 3**

**CONNECTING WITH USERS**

SIL understands and meets user needs, serving users where they live and work

**STRATEGY 3.1**

SIL looks to user generated evidence for its decision-making framework

**INITIATIVE A:** Collect and analyze users’ current usage data (focus groups, interviews, etc.) while respecting their individual rights to privacy

**NEXT STEPS** Interview users to understand and determine their research/information needs.
Host quarterly focus groups producing at least one idea to be adopted and reported on.
Identify sources of data on the use of collections, and create a central repository for the data including both statistical and anecdotal data.

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7 Possible sources: SIRIS circulation data and search queries; ILL requests; SIL web site page hits and searches; LIBQUAL; usage of online journals and databases; branch staff soliciting feedback; suggestion button on SIRIS
**INITIATIVE B:** Develop profiles of SIL core user groups and their typical characteristics, likes and needs using internal and external third party research

**NEXT STEPS** Partner regularly with SI Office of Policy and Analysis on methods for analyzing data to review current services, user trends and future needs. Consult with SI Office of Fellowships on perceived trends and research needs of the upcoming generation of scientists and scholars. Configure SIRIS to automatically generate and display personalized recommendations based on users’ queries.

Investigate the information needs of SI researchers “in the field” (e.g. on scientific or cultural expeditions and fieldwork) and find ways to meet their needs.

**INITIATIVE C:** Generate mechanisms that will reveal patterns of customer use and perceived value of SIL services based on user needs

**NEXT STEPS** Create a “Buzz Index” reflecting usage of SIL’s web sites and/or online catalog, and link it to SIL’s home page.

Develop means of collecting feedback on library services and research needs from user communities.

Conduct interviews with SI Fellows, interns, and other short-term users to get their opinions on how to improve library services.

**INITIATIVE D:** Invite users to collaborate and refine SIL programs, products and services for continuous improvement based on user feedback

**NEXT STEPS** Use metrics to determine the amount of resources (staff time and money) to put towards SIL’s most wanted and valued services; also use metrics to explore less needed areas of service where staff time and money might be reduced or eliminated.

Based on feedback gathered, re-evaluate SIL’s services for tweaking, changes of emphasis.

**INITIATIVE E:** Identify and reach out to potential users of SIL

**NEXT STEPS** Distribute information about SIL and its services at scholarly conferences and research-related events.

Design and implement versions of SIL’s most popular web services adapted for mobile devices, based on an analysis of users’ current and future needs.

Experiment with new means to reach potential users not typically associated with SIL.

Encourage guided tours of SIL resources.

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1 While attending to what is required with Human Subjects Research
2 Similar to the feature used in Amazon.com
3 Similar to http://buzz.yahoo.com/; some kind of display of most used features of SIL
4 Such as users from SI’s various business units, disciplines, geographic areas, as well as users from lesser-served groups such as independent researchers, freelance journalists, magnet school teachers and classes, etc.
GOAL 4 BUILDING EXPERTISE  
SIL builds expertise on information discovery, navigation and management

STRATEGY 4.1 SIL continuously develops and refines the competencies and skills needed to meet the challenges of the libraries’ changing role in an ever-changing information landscape

INITIATIVE A: Raise the minimum knowledge and skill level of SIL staff members to be consistent with what users expect from a center of expertise

NEXT STEPS  As new positions are approved, review position descriptions and revise them to define appropriate knowledge and skill levels for each position at SIL, and revise performance plans to set acceptable base lines of performance.
Create a multi-pronged educational approach to raise staff skills, including “23 Things,” technology petting zoos, brown bags, blogs, wikis, and/or sandboxes with the assistance of TAG.
Through an interactive online site, gather internal and external training and professional development opportunities to assist staff in planning their development.
Train staff on SIRIS Cross Search Center.

INITIATIVE B: Allocate resources and staff to support new goals and initiatives through performance plans and managerial structure

NEXT STEPS  Require and support the learning of new skills and experimentation by setting down challenges in performance plans and providing a robust learning environment that result in measurable changes in staff competencies.
Experiment with ad hoc task forces that focus on one problem and disband when goal is accomplished.
Train, hire and mentor knowledgeable staff with appropriate content and technical skills to perform effectively in the web 2.0/3.0 environment; conduct the next new hire process with this in mind and evaluate the results after six months and one year.

INITIATIVE C: Determine best means of providing access to and sharing internal SIL communication, documentation and collective knowledge.

NEXT STEPS  Expand the use of internal collaborative spaces such as SharePoint and wikis.
Use new models for the collection of and access to SIL written communication and documentation that allow for testing and experimentation.

12 http://plcmc12-things.blogspot.com/
STRATEGY 4.2  SIL teaches people how to discover, navigate and manage information effectively

INITIATIVE A: Create a toolkit of common processes for accessing and distributing information that can be deployed depending on the needs and preferences of individual users

NEXT STEPS
- Create YouTube videos with explanations of SIL services and processes for our website as beta
- Make SIL cameras readily available for use.
- Gather and evaluate ideas from other libraries and museums to see how they use video tools to enhance user services and experiences.
- Set up colloquia and host a series on the use of technology to enhance user services.
- Expand the use of “Desktop Doctors” from NH with SIL staff and/or broaden range of service.

INITIATIVE B: Create resource-discovery workshops tailored to the information needs of individuals and specific groups in the SIL user community

NEXT STEPS
- Host interdisciplinary workshops to encourage the cross-pollination of ideas among SL staff and researchers on topic determined by survey.
- Offer new resource “petting zoos” for the Institution that demonstrates SIL services and expertise; begin with a zoo that focuses on tools to support creative internal communication.
- Create podcasts, wikis, videos, blog, etc. that explore how to discover, navigate and manage information, paying special attention to results from goal 1; implement and evaluate at least two such products in the first quarter of the year.
- Cosponsor lecture series with SIA and OCIO devoted to how information access and delivery methods are changing and what libraries, museums and archives need to do to stay relevant.

GOAL 5  SECURING FINANCIAL RESOURCES
SIL is committed to finding opportunities to secure its financial future

STRATEGY 5.1  SIL creates opportunities for funding operations and programs

INITIATIVE A: Build a robust program to increase annual giving

NEXT STEPS
- Send targeted mailings to three new library communities.
- Continue annual mailings for AfA, Leighty and other special funds.
- Work with Cooper-Hewitt to kick off annual fund for new library space.
- Cultivate donors with major capacity for gifts.
- Hire a Development Director as soon as possible.

INITIATIVE B: Strengthen the SIL Advisory Board

NEXT STEPS
- Build Board membership to eighteen by 2011.
Develop effective orientation program for new members and handbook for all members.
Engage members in life of SIL through participation in programs and activities and frequent communications and interactions.

INITIATIVE C: Work with Board Development Committee to create fund-raising events
NEXT STEP Plan an event for 2010.

INITIATIVE E: Participate in the SI Capital Campaign

INITIATIVE F: Develop a marketing strategy that targets potential donors by broadening awareness of SIL collections and services
NEXT STEP Apply the “friends of the library” concept to target specific interest or subject groups.

INITIATIVE G: Develop a “toolkit” of fundraising strategies/opportunities/models
NEXT STEPS Explore “Adopt a Book” initiatives.
Encourage creative branch level fundraising.
Educate staff about grant application opportunities and writing techniques.
Host periodic workshops for staff to share fundraising strategies and successes.
Find and place funding information in a central location.

STRATEGY 5.2 SIL increases revenue from content-based products

INITIATIVE A: Market availability of images for licensing
NEXT STEP Produce press release and place two ads about each event.

INITIATIVE B: Promote development of new products based on SIL images
NEXT STEP Encourage branch staff to provide relevant images to Product & Licensing staff.

INITIATIVE C: Develop commercially viable products from collections that can produce royalties
NEXT STEP Test one new content project for its marketability.