

The Planning Process

Abstract

This chapter of “Building the Digital Branch: Guidelines for Transforming Your Library Website” discusses how to turn the information gleaned from staff and patrons into a plan of action, how to gather people to help with the work, and how to present your plan to your library’s management team. The chapter includes guidelines for organizing the information you’ve gathered and working with a committee or administrators to help secure approval for your plan.

In the last chapter, we discussed ways to gather information from managers, library staff, and patrons about what they expect to find at a digital branch. Now we have to start the planning process and then create a tangible product from all of the information we gathered.

In this chapter, we will discuss how to turn the information gleaned from staff and patrons into a plan of action, how to gather people to help with the work, and how to present your plan to your library’s management team.

Pull Your Information Together

First things first: you need to take all the information you gathered—the patron observations, the popular websites patrons use, the focus group content, results from any online surveys that you conducted, and the meetings you held with staff—and condense it into a cohesive plan for your digital branch. Let’s figure out how to do that by answering some “what,” “why,” and “how” questions.

First the “what” question. What exactly is this document’s purpose? The document you’re going to create

from all your research and information gathering isn’t so much a cohesive, detailed, step-by-step plan. It’s more of an outline, backed up with organizational information and customer wants and needs.

The outline should be as short as possible. No one wants to read a twelve-page document on how to structure a website (well, I might read it . . . but your average deputy director probably has better things to do). This document should not give details about implementation. Instead, it should give overviews of what you discovered and possible next steps. The best documents are short, concise, and simple.

How about the “why”? Why make this document? Well, you don’t always have to. If you have sole responsibility for the website, and your boss says, “Just go build it” (I’ve had that directive in past jobs), you might not need it. If your library is small enough that this type of detail might be overkill, you also might not need it.

I would suggest creating this planning document anyway. First of all, careful planning and documentation of your work is never a bad thing. Second, whether or not you need the document now, you might need it in the future. For example, let’s say your library is creating its first blog. When you’re at the point where writing assignments are being handed out to staff, they are going to have some burning questions, like “Why do I have to write for the blog?” or “What’s in it for me?” and might even suggest, “Our patrons don’t want this type of stuff!”

If you did the legwork and created a document showing what staff and patrons expect in a new website, you can whip out your handy-dandy document and *show* them your reasoning and the statistics and quotes behind the reasoning. This type of concrete information is much better than getting into a subjective argument about whether or not your patrons are using MySpace. If you

can back up what you're doing with solid information that you gathered from your own library users, your future arguments about why you're going in this direction are much stronger.

Finally, the "how." How do you take all that great information you gathered and mash it up into a cohesive document? There are many ways to do this. I used MindJet's MindManager program. It's a mind-mapping application (see figure 8). Mind mapping, according to a "define mind mapping" search in Google, is "a diagram used to represent words, ideas, tasks, or other items linked to and arranged radially around a central key word or idea."¹

To begin, I went through my first document from the information-gathering phase, arranging the information in points underneath a heading like "wants to create a new books blog." As I went through my document, I synthesized my findings in an outline-like order. Then I tackled the next document, and so on, until all my meetings and findings were displayed in a mind map with headings and subheadings.

That gave me a rough draft outline with talking points. You don't need to hone this document further

into a ten-page white paper complete with multiple appendices. Save that for your article about redesigning your website in a library-related journal. Your outline is good enough for your next step, which is to start talking. Take your talking points to your manager, or to your next managers' meeting, or to whoever gets to approve your next steps, and discuss. Do a presentation. Hold a meeting. Hand out copies.

You have a few goals to achieve during this meeting:

- *Get people talking.* You want them interested and excited enough about the ideas to start talking about the digital branch and what it could do for the library and for your library's patrons. That excitement can spill over into action and approval.
- *Provide information.* You want to succinctly describe the goals for this redesigned digital branch and your next steps.
- *Get the go-ahead.* Of course, your big goal is to get your next step approved. That next step probably needs to be to start building—or better yet, to gather a committee that can discuss and decide the details of your digital branch plan.

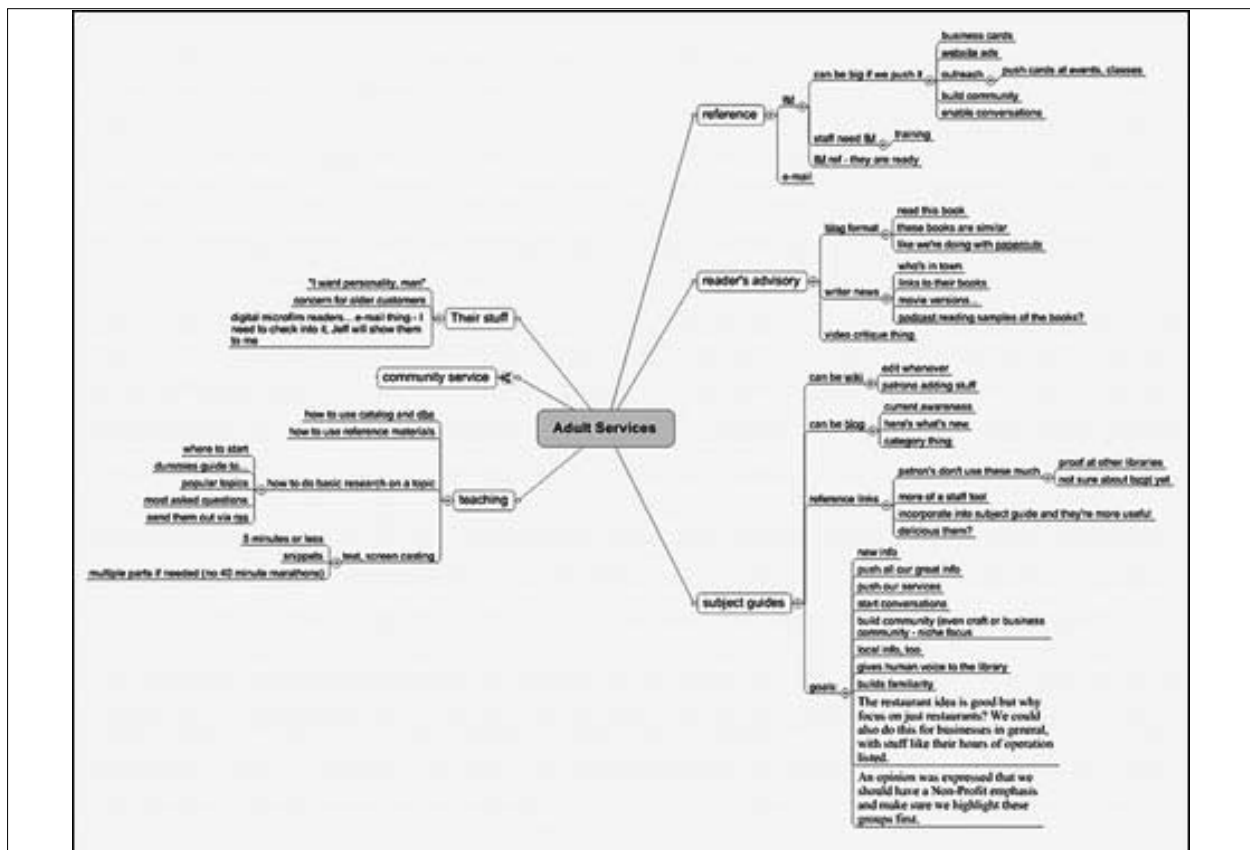


Figure 8
A mindmap.

Gather a Committee

Your digital branch idea was approved! My recommended next step? Form a committee to work out the details. This is an important step because it gets other staff members involved in the project. In addition to the obvious advantages of spreading out the workload and bringing in additional perspectives, it also strengthens the case for your project. If you don't get others involved and if someone doesn't like what you created, it's your fault. You did it, it was your plan, and the rest of the library might not want to follow along—you will have resistance. But if you have a committee planning the details and the direction, you will already have a built-in groundswell of support, because more people will “own” the project.

What should this group do? For starters, you need to present your findings to the group: not just the overview that you presented to managers, but the whole enchilada. Go over all the details with them. Then, as a group, figure out how to hash through your findings and ideas and create an action plan.

That's what we did at Topeka and Shawnee County Public Library. We formed the Digital Branch Committee, and I presented my findings (most of this group also participated in some of my fact-finding meetings, so there weren't any surprises for them).

We went through my notes and picked out the good stuff. Then we discussed if anything was missing—if there was anything we needed to add to the mix. Next we discussed lots of details: details like what navigation scheme to use on the website (e.g., left side, right side, top of every page), what the wording for major links should be, and what pages we needed to emphasize on the main page of the site.

Another large set of details involved the visual design of the website. Our webmaster started building mock-up designs, and we discussed, refined, and handed them back for a redesign.

Go Visit the Managers Again

This is an important step. Once you have the details fleshed out, you need to touch base with your managers and administration again. Briefly describe what your group has done, and show them your final mock-up. We explained which major services we'd be highlighting, what our navigation scheme would be like, and our concept of blog-based subject guides to be used on the site. If you can, do some quick HTML and CSS coding to make a working mock-up of the site so that they can click through it and explore your idea. Your goal in this meeting is to make sure this group approves your progress.

Important side point—don't take too much ownership of the work you've done to this point. Share what you created, be proud of your work (because you have done a smashing job, I'm sure), and then let your management group decide if it's the right way to go. Instead of arguing our group's points, I described them, gave our committee's reasoning for what we did, and then let the group decide. This provides even more buy-in for the digital branch.

Note

1. “Mind Map,” Wikipedia, http://en.wikipedia.org/wiki/Mind_map (accessed June 20, 2009).