Providing data management support is a growing field within librarianship, but one thing that has become apparent during discussions with other data services peers is that not every institution implements the same data services. Certainly, librarians supporting data are concerned with new data requirements, but our services play out in very different ways. Some focus on data information literacy; others, on building and populating a local data repository. Also, there is clearly a difference between the data services offered at large research institutions versus small liberal arts colleges. These differences are not unexpected, as people come to this profession with a variety of skills and backgrounds and the needs of researchers across institutions will be different.

This lack of a cookie-cutter method to support research data underscores the necessity of properly identifying local data needs and translating those needs into concrete plans for service offerings. For example, the large number of non-traditional and off-campus students at the University of Wisconsin-Milwaukee has driven the library to consider how it offers data management training to these students (one answer: videos). All of this research and goal-setting falls under the larger heading of strategic planning. While many libraries and universities as a whole create strategic plans, it is worthwhile to perform this exercise for the data-related subset of services.

Why Create a Strategic Plan?

Strategic planning is an ideal start either to establishing or growing data services because it aligns services with the direct needs of users and balances those needs against the skills librarians bring to the table. This alignment allows us to do several things. First, it helps us set a clear path for establishing or building services; and second, strategic planning provides a way to solicit buy-in from peers and administrators to get support for those services. Importantly, a strategic plan does not need to be set in stone: it can be redone every few years to ensure that services are still targeting the most important requirements. A good strategic plan sets a vision for data services to meet a focused need during a specific period of time using identified resources.

How to Create a Strategic Plan

So how does one go about creating a strategic plan for data services? The first step is research. Start with basic background information on the institution to provide context. For example, what are the mission and demographics of the institution, and how might they affect service offerings? Build on this information by identifying user needs around data. One way to understand user needs...
is to survey local researchers about their practices using one of several available instruments [1, 2, 3]. Alternatively, draw from the number of excellent published studies on researcher data behaviors [4, 5, 6, 7, 8]. The final step of research is to augment all this information with whatever else is known about resources and other needs at the specific institution. For example, are there specialized data skills available in the library or common issues that come up in current consultations? The objective is to collect enough information so that someone unfamiliar with the institution can easily understand its unique data landscape.

With research complete, it can be useful to distill this information into a strengths, weaknesses, opportunities and threats (SWOT) analysis. Strengths and weakness focus on the positives and negatives aspects within the library that will impact potential services, such as personnel with special skills or budget limitations. Conversely, opportunities and threats focus on positives and negatives external to the library, such as new funder or journal data policies or the fact that researchers may be unaware that the library offers services in this area. The SWOT analysis is a great opportunity to list all relevant factors before deciding on service goals.

From the initial background research and the SWOT analysis, it is time to choose the goals that will form the backbone of the strategic plan. Goals should be achievable, actionable and address a specific strength or need at the institution. Goals should also include a timeline for completion and identify any necessary resources. While goals can be small or large, it is useful to limit strategic planning to a timeline of a few years as the field of data management is still changing. Consult with relevant stakeholders to ensure that goals meet everyone’s expectations.

The final step of strategic planning is to distill all of this information into a short document. A useful format includes background information, the SWOT analysis and goals, but at a minimum the plan should outline the goals. A good example plan comes from the Oregon State Libraries [9]. The final document should be thorough yet concise enough for anyone outside the planning team to easily understand, which can help get important administrative buy-in.

### What to Do With the Strategic Plan

A good strategic plan represents only the beginning of the actual work of service development, but it defines outcome measures and ensures that all of the key players are moving in the same direction. Those working on the front lines can establish priorities, create timelines and better focus their efforts on the most important projects. Administrators can allocate necessary resources. Potential users can better understand service offerings. With a shared vision, services can develop and grow.

Strategic planning serves an important function in a new area of librarianship like data management. While the exercise sets a vision and priorities, it is only one part of a larger cycle of services development that should repeat every few years as needs and resources change. I encourage my fellow data management professionals to consider strategic planning in their efforts to grow new services and best meet the needs of their users. ■
Resources Mentioned in the Article


