ASIS&T Strategic Plan 2015-2020

EXECUTIVE SUMMARY

The 2015 ASIS&T President, Sandy Hirsh, formed the Strategic Planning Task Force (SPTF) at the Annual Meeting in Seattle, Washington in November 2014. The SPTF collected data over a six-month period, analyzed the data, reviewed findings with the Board of Directors, and summarized key findings and strategic directions in a report (*ASIS&T Strategic Planning Report: Key Findings and Strategic Directions, http://bit.ly/1QlwFJb*). There are five strategic directions identified in the report:

1) Membership
2) Programs/Services/Mentoring
3) Publications/Communications/Social Media
4) Publicity/Outreach/Advocacy
5) Institutional Knowledge

The SPTF worked closely with the ASIS&T Board of Directors during the summer of 2015 to develop goals and objectives for each of the five strategic directions. This draft strategic plan was shared with the ASIS&T community for review and discussion in September and October 2015. The SPTF revised the Strategic Plan based on feedback received. The revised Strategic Plan was adopted by the Board of Directors on November 7, 2015 at the 2015 Annual Meeting in St. Louis.

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INTRODUCTION

The 2015 ASIS&T President, Sandy Hirsh formed the Strategic Planning Task Force (SPTF) at the Annual Meeting in Seattle, Washington in November 2014, with the following purpose:

- Review ASIS&T's mission, vision, and goals and translate these into clear actions that can be reported on;
- Survey (using various methods, including focus groups, interviews, surveys and other instruments) ASIS&T members to ensure the Association is meeting membership needs and being more transparent;
- Develop a plan of action, with goals and objectives, that will provide strategic direction for the Association, thus setting the Association up for long-term success;
- Assess resources to better align the Association with the strategic goals and objectives.

The SPTF reviewed the existing mission and vision for the Association and updated the statements to reflect ASIS&T's international focus; these serve as ASIS&T's guiding principles:

Mission
The mission of the Association for Information Science and Technology is to advance the information sciences and related applications of information technology by providing focus, opportunity, and support to information professionals and organizations in all parts of the world.

Vision
Establish a new information professionalism in a world where information is of central importance to personal, social, political, and economic progress by:
- Advancing knowledge about information, its creation, properties, and use worldwide;
- Providing analysis of ideas, practices, and technologies;
- Valuing theory, research, applications, and service;
- Nurturing new perspectives, interests, and ideas;
- Increasing public awareness worldwide of the information sciences and technologies and their benefits to the Association.

The SPTF collected data over a six-month period (November 2014 - May 2015), submitted reports and preliminary strategic directions to the Board of Directors for review and discussion (July 2015), received recommended amendments and changes from the Board (July 2015), and then finalized the *ASIS&T Strategic Planning Report: Key Findings and Strategic Directions* (August 2015) – http://bit.ly/1QlwFJb.

The five strategic directions identified in the report are:

1) Membership
2) Programs/Services/Mentoring
3) Publications/Communications/Social Media
4) Publicity/Outreach/Advocacy
5) Institutional Knowledge

The Board of Directors worked closely with the SPTF to develop goals, objectives and activities (those "SMART" criteria – specific, measurable, assignable, realistic and time-related) contained in this draft Strategic Plan. The ASIS&T President and Board of Directors will prioritize which of the Strategic Plan's goals and objectives will be the focus for each year over the next five years. Many, if not all of the goals, objectives and activities will require some form of financial support; financial considerations will be carefully evaluated by the Board of Directors in the context of the ASIS&T budget at the time of implementation.

Strategic directions, goals, and objectives are numbered in the Strategic Plan as a way to provide easy referencing in the document; the numbering does not indicate priorities. Several of the goals and objectives are intertwined because the five directions are not mutually exclusive. Therefore, some goals share similar elements with different objectives to carry out each goal's directions.

STRATEGIC DIRECTION 1: MEMBERSHIP

The heart of any organization is its members. ASIS&T has long been known as a gathering place of leaders, academics, practitioners, and students in all facets of the information professions. However, while jobs and careers in information-related areas are increasing, membership in ASIS&T has decreased, a pattern seen in many other associations as well. Information is global and that requires an association that is global in vision, with members reflecting this reality. Programs and services are key factors that drive membership, attracting and retaining a broader range of membership (See also Strategic Direction 2: Programs/Services/Mentoring).

Goal 1.1: Retain both new and continuing members.

- Objective 1: Develop innovative programming and/or a new publication that keeps existing academic, professional, and institutional members in the Association.

- Objective 2: Promote job and internship listings available through ASIS&T listservs that are only available to members.

- Objective 3: Develop workshops, trainings, and/or other activities that help members participate more fully in ASIS&T initiatives (e.g., develop workshops on writing for *JASIS&T*).

- Objective 4: Create a "Member of the Month" feature on the ASIS&T website to highlight the breadth of membership and to celebrate individual success and contributions to the Association.

- Objective 5: Ensure the smooth onboarding of new members and leaders by facilitating personal connections with existing members and leaders.

- Objective 6: Review benefits for institutional members to determine what would attract and retain institutional members.

Goal 1.2: Increase regular memberships.

- Objective 1: Increase regular memberships annually by 0.5% through an outreach/publicity campaign (e.g., by targeting non-members who attend ASIS&T programs, reaching out to recently lapsed members, utilizing radio and Internet/Web advertisement media, etc.).

- Objective 2: Develop a membership-marketing program with "sister" societies and associations, with the aim of adding 100 regular members within the first year.

- Objective 3: Regularly gather testimonials about the value of membership and post them prominently on the ASIS&T website and share them via social media.

Goal 1.3: Increase student and transitional memberships.

- Objective 1: Create a Student Chapter Advisor training program, which will guide and support advisors as they guide and mentor students through their first ASIS&T experience.

- Objective 2: Offer student members, within a year or at the time of joining, an ASIS&T email alias that they can continue to use when they transition to a regular member.

- Objective 3: Create a Transitional Mentoring Program for student members that encourages them to register as transitional members and then on to full regular membership within 3 years.

Goal 1.4: Attract new academic, professional, and institutional members.

- Objective 1: Clearly articulate value propositions for various groups of members and make marketing materials available in multiple languages.

- Objective 2: Provide more opportunities for academics and professionals to benefit from and complement their respective skills and knowledge through programs, events, research collaboration, and other initiatives.

- Objective 3: Attract more professionals to ASIS&T by showcasing 'information science in practice' at Annual Meetings and Chapter/SIG events.

- Objective 4: Provide a forum for ongoing discussions on specific areas of information science to define a "baseline" or "bluebook" agreed upon by the ASIS&T members (i.e., forum discussion would define a glossary of terms such as "knowledge management").

- Objective 5: Provide more attractive incentives for institutional members, such as reduced membership rates and meeting registrations for a maximum number of individuals within an institution.

Goal 1.5: Improve membership system integration and access.

- Objective 1: Integrate access to personal membership information with other services on the internet to provide seamless access, with proper security features, whether from another social network provider (e.g. signing in to ASIS&T membership database using LinkedIn account) and regardless of device/technology being used (e.g. tablet, mobile device).

- Objective 2: Develop the capability to create a member profile that can be ported to other services/technologies, and can be used within the Association for various purposes, such as creating speaker bios for use during conferences, identifying potential speakers for upcoming programs, matching mentors and mentees, connecting new members with the chapter in their geographic region, and creating stories as part of Strategic Direction 4: Outreach/Publicity/Advocacy.

STRATEGIC DIRECTION 2: PROGRAMS/SERVICES/MENTORING

ASIS&T members and non-members alike are drawn to the wide array of programs and services – meetings, conferences, webinars, workshops, social events, etc. – and there is demand for more, both virtual and face-to-face programs, including at the local level.

Mentoring, the process where an experienced person "takes under her or his wing" a less experienced person and guides them, through dialog, interaction, coaching and sharing, is a successful structure for building expertise and leadership.   Demand for this process is high, not only among students and among new professionals, but also with mid-career professionals who are embarking into new territories.

Goal 2.1: Realign existing conferences, meetings, webinars, workshops, and other programs and services to meet more closely the needs of both academics and professionals.

- Objective 1: Ensure that Annual Meeting programming is relevant to professionals by introducing new panels, tracks, and product showcases.

- Objective 2: Introduce new awards for professionals that recognize their achievements and contributions to the Association.

- Objective 3: Initiate an internal speaker's bureau by developing a database of potential speakers, publicizing this tool on the ASIS&T website, and coordinating and linking the speaker's bureau database with the webinars.

Goal 2.2: Provide a more effective conduit between academics and professionals.

- Objective 1: Re-launch the *Bulletin*, perhaps with a new name, with a range of content designed to appeal to both academics and professionals , and evaluate the need for one or more new publications aimed at professionals and at other disciplines.

- Objective 2: Support virtual networking and collaboration between academics and professionals, for example by launching the First Draft, which is a pre-proposal, pre-publication, pre-presentation virtual space for ASIS&T members for frank and open discussions about their ideas.

Goal 2.3: Expand and strengthen programs and services at the local/regional, SIG, and international levels.

- Objective 1: Provide more virtual programs and events that enable greater engagement and participation of a broader range of members, regardless of their geographic location.

- Objective 2: Engage members at local levels through local meet ups, regional events (mini Annual Meetings), etc.

- Objective 3: Develop regional programs that can be "canned," be delivered to more than one location, and involve regional chapters, student chapters, special interest groups and international leaders, as needed.

- Objective 4: Develop more programs focused on soft skills, such as effective public speaking, program planning, assessment and evaluation tools (e.g., how to manage an effective focus group), running meetings (e.g., for committees, taskforces, work groups), and marketing/publicity.

- Objective 5: Assess and create structures that enhance collaborations within the Association between regional and student chapters and the Special Interest Groups, for example by matching luminaries in our profession with local or regional programs.

- Objective 6: Develop a mentorship program to cultivate leaders from regional chapters and SIGs.

Goal 2.4: Introduce a variety of mentoring programs for academic and professional leadership.

- Objective 1: Create a doctoral consortium program for doctoral students.

- Objective 2: Create a leadership preparation program that provides training and support for new and emerging leaders at all levels of the Association.

- Objective 3: Develop a career mentorship program that provides career support and advice to scholars and professionals.

- Objective 4: Develop a mentoring program for students that matches them with new professionals (i.e., those who were recently students) to smooth the transition from student to professional.

STRATEGIC DIRECTION 3: PUBLICATIONS/ COMMUNICATIONS/ SOCIAL MEDIA

JASIS&T and the *Bulletin* are regarded as leading publications in the field and should be maintained as such, but there is demand for more avenues to disseminate knowledge, experience and data, especially for professionals.

Goal 3.1: Improve the global impact of ASIS&T publications, communications and social media outlets.

- Objective 1: Re-envision and strengthen the position of *JASIS&T* as the premier publication by expanding the scope (e.g., practice-oriented/topicality/interdisciplinary) and accessibility and by reducing the publication time and refining the publication cycle.

- Objective 2: Create alternative platforms for dissemination of communication, such as a virtual peer-review professional publication that highlights emerging technologies, discusses best practices, enables discussion via opinion pieces, disseminates pilot project results, and provides more "translational research" by making research easier to understand and apply to work situations.

- Objective 3: Explore partnership opportunities to enhance ASIS&T reach and to expand content within third party information professional publications (e.g., providing "The ASIS&T Perspective" opinion blog/column in *Information Today* or a similar publication); this type of partnership also supports Strategic Direction 4: Publicity/Outreach/Advocacy.

- Objective 4: Create staff position(s) to assess and manage communications, social media, and outreach, with the aim to increase communication within membership, visibility with non-members globally, and visibility with employers/industry globally by:
    o Developing social media policies and processes.
    o Reviewing social media analytics.
    o Creating new and better platforms for dissemination of information.
    o Reaching out to members for online news and content.

Goal 3.2: Engage in a range of communication, publication, and social media activities to give people reasons to "like" or "follow" ASIS&T by providing content of interest to them.

- Objective 1: Increase use of social media and other tools (such as Twitter, video podcasts, online forum for blogging, microblogging, and commenting, RSS feeds and monthly email blasts).

- Objective 2: Expand communication through publications (such as writing articles for the *Bulletin*; developing a new student publication; increasing more content for information professionals; making research content from *JASIS&T* more accessible and applicable to professionals) and widely promote these communications/publications.

- Objective 3: Promote a range of presentation-types (such as lightening talks and interactive sessions at Annual Meeting; offer opportunities for people to participate virtually during the Annual Meeting).

- Objective 4: Develop activities that foster connecting (such as speed mentoring/networking, based on the speed dating model).

- Objective 5: Provide more publication support (e.g., pre-previewing and providing "First Draft" feedback on ideas, proposals, posters, and papers; offering mentoring activities to help writers).

- Objective 6: Archive publications by developing an ASIS&T Repository.

- Objective 7: Provide enhanced member-exclusive content that gives members reasons to visit and log into the ASIS&T website (e.g., for news updates on technology and information environments, events in higher education, and research relevant to ASIS&T members).

Goal 3.3: Re-envision and strengthen the Annual Meeting Proceedings, exploring ways to enable the AM Chairs and reviewers to get scholarly publishing credit for their contributions.

- Objective 1: Gather input from past AM chairs, reviewers and scholars on the amount of time spent on the process for developing the Proceedings.

- Objective 2: Analyze data and propose methods for handling credit and strengthening the Proceedings.

STRATEGIC DIRECTION 4: PUBLICITY/OUTREACH/ADVOCACY

The Association's visibility to those in the information professions as well as to those outside the professions, whether closely related or not, has decreased. To some, this is a sign of dwindling importance, even if programs, publications and other actions by the Association remain strong. A publicity, outreach, and advocacy program by ASIS&T should not just improve name recognition, but it should encompass feelings of "I want to belong to that organization – I want to be part of that success!"

Goal 4.1: Improve communications with ASIS&T members regarding Association activities and resources.

- Objective 1: Feature enriched content on the website and monthly emails – driving more regular visits to the ASIS&T website.

- Objective 2: Review social media analytics to develop a plan for communication that includes social media based member and non-member preferences.

Goal 4.2: Provide effective communication about the value and purpose of ASIS&T to multiple audiences in all regions of the world.

- Objective 1: Increase visibility and name recognition of ASIS&T outside the organization by:
    - Developing marketing material and a vocabulary to talk about ASIS&T to non-members, employers, and members of other professional organizations.
    - Reviewing the website for language and content and including a section aimed at media, with contacts for ASIS&T experts in a variety of areas.
    - Encouraging chapters and regions to contribute materials (in their language) that promotes ASIS&T.
    - Conducting marketing research focused on identifying media outlets that reach the most current and potential members, such as through other conferences, radio ads, web advertising, etc.
    - Developing assessment tools that will evaluate the impact of publicity/outreach campaigns.
    - Repurposing content to suit diverse global audiences.

- Objective 2: Enable each member to become an ASIS&T Ambassador by:
  - Engaging ASIS&T members on a regular basis outside of the Annual Meeting, through webinars, online discussions, 'issues of the month', short polls and surveys, and other services for various career stages.
  - Producing video interviews of member testimonials regarding the value and purpose they find in ASIS&T (impact of membership).
  - Connecting members to one another to facilitate collaboration and a shared ASIS&T identity.
  - Leveraging networks of alumni based in various sectors outside academia (health, government, IT, etc.).

- Objective 3: Make ASIS&T better known to employers by:
  - Collaborating with Information Professionals Taskforce on advocacy issues.
  - Developing ASIS&T as a label for quality and expertise.
  - Creating downloadable marketing materials, templates, logos, brochures.
  - Publicizing and promoting the work of the Information Professional Task Force.

- Objective 4: Make ASIS&T better known to other (learned) societies and associations by:
  - Leveraging current ASIS&T members' networks within societies such as ACM, IEEE, SIGIR, ISKO, DL, IFLA, Digital Curation, EU, and Council of Scientific Society Presidents, AAAS, and associations like ALA, SLA, and MLA.
  - Developing sessions and panels comprised of ASIS&T members and submitting these proposals to sister conferences.

Goal 4.3: Explore ways to bring ASIS&T into policy debates and media coverage of current events.

- Objective 1: Explore interest in creating a policy arm of ASIS&T to educate the public and policymakers (e.g., Electronic Frontier Foundation, EPIC, Civil Liberties, Congress, global groups, etc.) on various issues related to the information lifecycle (e.g., production, organization, management, access, use, ethical aspects), as well as to share updates with members on policy issues.

- Objective 2: Create a roster of ASIS&T scholars who are interested in contributing to the public debate around various information matters.

- Objective 3: Establish a Speakers Bureau and develop a Congressional Handbook.

- Objective 4: Facilitate training for ASIS&T members on how to communicate with policymakers and how to translate research into policy briefs, and invite policymakers to attend/speak at ASIS&T conferences and to meet members.

STRATEGIC DIRECTION 5: INSTITUTIONAL KNOWLEDGE

As a knowledge leader, ASIS&T institutionally must improve its knowledge management (KM) procedures and processes. Preserving its institutional knowledge will enable ASIS&T leadership at all levels – internationally, regionally, and down to individual student chapters – to enhance communication, leadership, and community and improve organizational memory and continuity.

Goal 5.1: Assess the current institutional knowledge and knowledge management practices of the ASIS&T community.

- Objective 1: Assess the current knowledge management practices of the ASIS&T community (Board, HQ, SIGs and Chapters, past, current Presidents, etc.).

- Objective 2: Assess what institutional knowledge is currently available (Board, SIGs, Chapters, AM Chairs, etc.) and where it is currently stored (ASIS&T server, with current and past Chairs).

- Objective 3: Clarify the organizational and governance structure of ASIS&T.

- Objective 4: Identify the user groups and the information needs of each group who will be using the institutional knowledge.

- Objective 5: Work with HQ to determine what institutional knowledge is stored on ASIS&T server and other locations.

- Objective 6: Document Board, SIG, Chapter, and AM Chairs' practices for capturing and preserving institutional knowledge by obtaining written testimonies from individuals within the ASIS&T community (past Presidents, chairs of SIGs, chairs of Chapters, SIG Cabinet Director, Chapter Assembly Directors, AM chairs, etc.).

Goal 5.2: Develop processes, practices, and mechanisms for capturing the institutional knowledge of the ASIS&T community.

- Objective 1: Formalize the capture process and best practices in officer manuals for the Board, SIGS and Chapters.

- Objective 2: Develop a manual for Annual Meeting (AM) Chairs/Co-Chairs which includes capture process and best practices.

- Objective 3: Add data management provision to Board, SIG, Chapter, and AM Chair reports.

- Objective 4: Define and build continuity structures into every leadership structure, develop induction and training kits for new leaders, and update all officers' manuals.

- Objective 5: Capture HQ staff members' tacit knowledge and engage in succession planning strategies by shadowing HQ staff members.

Goal 5.3: Implement processes and practices to preserve the institutional knowledge of the ASIS&T community.

- Objective 1: Hire a dedicated ASIS&T staff person, or redefine current staff responsibilities, to:
  o Develop and maintain the knowledge management system.
  o Develop a user-centered centralized archive.
  o Assist the Board, SIGs, Chapters and AM Chairs to migrate their documents to the centralized archive.

- Objective 2: Conduct a usability study on the new archive after the information is migrated to the new archive to:
  o Determine if all knowledge has been archived.
  o Determine if the information is easily accessed by the different user groups.
  o Recommend changes to the archive to the Board and implement them once approved.

NEXT STEPS

This Strategic Plan was developed based on input from members, ASIS&T board and other leaders, non-members and other key stakeholders. A draft version of the Strategic Plan was made available to ASIS&T members for review and feedback. Three virtual townhall feedback sessions were held in September and October 2015, and people were encouraged to send their comments through social media and through an email alias created for the strategic planning process. Based on the member feedback received, the Strategic Plan was revised. The revised Strategic Plan was adopted by the Board of Directors on November 7, 2015 at the 2015 Annual Meeting in St. Louis. The Strategic Plan will be a living document, which will be reviewed and revised regularly by the ASIS&T Board of Directors.

Each President-Elect will draw from the ASIS&T strategic plan focus areas/goals/objectives to identify the top priorities that he/she will focus on during his/her year as President. The President-Elect will align these priorities with the ASIS&T governance, committee and taskforce structure in preparation for his/her presidential year – creating committee and taskforce charges, appointing people to leadership roles, setting timelines, and determining funding needs – to realize these priorities and to advance the vision of the Association.

The Board of Directors will develop a process for ongoing review and updating of the Strategic Plan. A tracking matrix will be developed to help evaluate progress, for example with columns for Goals, Objectives, Responsible Party/Group, and Status (Completion Date). It is recommended that a formal revision and updating of the Strategic Plan be done at least every five years (with systematic data collection, including through focus groups, feedback from membership, analysis of membership trends, environmental scans, and other inputs), with annual SWOT analyses completed at the annual Board Retreat and with biennial (twice yearly) progress check ins at the Annual Meeting board meeting and the annual Board Retreat.

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