Strategic Planning Worksheet

Inputs to this Strategic Planning Meeting are answers to these questions solicited during Leadership Group Meeting:

1. What new opportunities can the project create for your state?
2. What expected or emerging opportunities can this project capitalize on?
3. What are the potential benefits (positive results) of this project for your state?
4. What statewide problems might this project help to solve?
5. Who can you target to assist in moving the project forward?

1. Review the high level decisions made by the Project Leadership Group
   A. Have there been any changes that might require an adjustment to decisions made in the Project Leadership Group meeting?
   B. Can your group add to the ideas put forward by the Leadership Group? (e.g., suggest additional opportunities, benefits, or problems solved)
   C. Remain aligned with the planned outlook and direction provided by the Project Leadership Group.

2. Define project values – the ideas and principles that underlie your project
   A. Idea: Use brainstorming techniques to gather unedited input from the group members. Work as a group to combine statements or words that refer to the same concepts.
   B. Create a rough definition for each term used, to be edited and reviewed at a later time.

3. Build on project values to create a draft vision statement for your project -- an idealized version of what your repository could be in an ideal world. This draft can be reviewed and edited as needed as your project takes shape.

4. Create a draft mission statement: a precise description of the project’s purpose and expected results
   A. Consider why you wanted to create a repository in the first place
   B. What needs are you meeting and how the repository will meet those needs
   C. The mission should be aligned with the values and vision you drafted in the previous steps
   D. Use measurable language in describing your expected results

5. Create a list of the communities that you might serve. For each community, list the services, needs or priorities they have. Some examples:
   A. Community: Students
      1) Possible services: provide resources for undergraduate, graduate, returning/continuing education
      2) Possible services: support at-risk students; improve retention rates for students in targeted disciplines
      3) Possible services: work with libraries to provide resources for student online research, publication vehicle for student research and student-generated content
   B. Community: Educators
      1) Possible services: provide resources for professional development, certification
      2) Possible services: publication vehicle (toward tenure, research collaboration & publication, creation of learning resources)
   C. Community: Institutional administrators
      1) Possible services: administrators for documenting efforts

6. Address content issues
   A. What specific content areas will you address -- initially, and perhaps later?
      1) Academic subjects
      2) Educational levels (e.g., graduate, undergraduate)
3) Training materials related to repository use
4) Authoring/packaging tools

B. What existing content can you access and how will you go about gathering this content?
1) Buy it
2) Enter into agreements with publishers
3) Solicit from faculty
4) Access student-generated content (e.g., projects or coursework)
5) Harvest and federate with other repositories
6) Engage in online research and networking to seek content sources

C. Will you create new content for your repository?
1) Consider the staffing, tools, time, and other resources that this will require.
2) Potential resources for creating new content: commercial providers, faculty and institutional staff, students

D. What types of content will your repository accept?
1) Technical types of content
   a. Will it house physical files?
   b. Will the repository refer to external resources (URLs)?
2) Granularity of content – what types of digital resource aggregations will you house?
   Some examples of types and definitions are provided below.
   a. Asset - A single, raw media files such as an image, text snippet, audio or video clip, or applet
   b. Information object - Two or more pieces of digital content, such as web page (s), activities, simulations, animations, or tutorials that illustrate a principle, explain a concept, or describe a process or procedure. Information objects can be combined to form a learning object. Information objects can be disassembled into content assets.
   c. Learning object - A complete piece of instruction that contains all resources and tools required for a learner to complete the learning task. It includes the following:
      i. one or more objectives
      ii. content presentation for each objective
      iii. practice with feedback for each objective
      iv. assessment of each objective (graded or self-assessment)
      Learning objects are formed by assembling a relevant reusable information objects. Learning objects may be sequenced and bundled to form larger learning components, such as lessons and courses.
   d. Learning Component - A collection or group of learning objects. A learning component typically has multiple learning objectives or instructional purposes. One or more collections of learning components constitute a course.
   e. Entire course

7. Address funding issues
   A. What funding is already secured?
   B. What are potential or additional sources of funding? (e.g. legislative appropriation, institutional fee for use, revenue generating options, grants)
   C. What funds are available for start-up?
   D. What funds are available for maintenance of the repository?
E. Will the repository be free to use or will there be a fee involved?

8. Resources
   A. What resources are already devoted to or could be used for the project?
      1) people (project director/manager, technical advisors for determining software/hardware
         requirements and ongoing input, technicians to manage the project)
      2) facilities
      3) hardware
      4) software
   B. What additional resources are required?
      1) people (project director/manager, technical advisors for determining software/hardware
         requirements and ongoing input, technicians to manage the project)
      2) facilities
      3) hardware
      4) software

9. Create strategic goals: Create goal statements with supporting objectives that describe:
   A. Repository services you will provide and the communities you will serve
   B. Repository resource content area(s) of focus, content acquisition methods, and acceptable
      content types
   C. Tasks related to securing or ensuring funding
   D. Tasks related to securing resources for the project
   This task may be accomplished more quickly by breaking into small groups to draft goals and
   objectives, with review and editing done by the large group.

10. Suggest methods to evaluate your progress toward each of the goals and objectives.

11. Prioritize: Create short-term and long-term priorities for your goals and for objectives within each goal;
    estimate time frames for completion.

12. Assign responsibility for the next level of operational research, recommendations, and decisions

13. Gain agreement on next steps and follow-up tasks.