

# Get past technology and define what you do

Peter Hicks<sup>1</sup>

<sup>1</sup>Curtin University of Technology, Perth, Australia, p.hicks@curtin.edu.au

## INTRODUCTION

Strategic planning is an essential part of running an effective organisation. Our universities do it, most faculties and major administrative areas do it. When it gets to smaller areas or teams, whether in a scholarly or administrative/technical area, planning often becomes operationally focused with vague reference to the higher visions and objectives. The value of strategic statements is real at any level of an organisation. They clarify purpose, define shared expectations and aid decision making when competing priorities are difficult to untangle.

Developing a set clear and concise statements about a relevant and inspiring objective, purpose and actions required to achieve can appear daunting. Like many activities, once you have a reference to compare to it becomes easier to do your own. This paper describes the elements of each statement and an example from Curtin IT Services eResearch Support.

## DEVELOPING STATEMENTS

The mission statement describes what you do and your contribution to the organisation [1]. The mission of Curtin IT Services (CITS) eResearch Support was written and firmly committed to memory before the group was established. *To assist researchers enhance research outcomes through the use of information and communication technology.* This mission signalled the intent of eResearch Support to those who would initially form it, the rest of Curtin IT Services and the research community. It also informed decision making about the initial team structure and priorities. A mission statement should be an everylasting broad view of the purpose of your organisational unit, particularly focussed on downstream effect of your operations. The statement does not describe the literal operations.

A vision statement describes where you will be in the future. The vision is more difficult because it includes a specific indicator of success with a deadline [1]. The vision for CITS eResearch took a while to develop, based on our experience of undertaking our mission for six months. We currently aspire *To be technical experts providing a competitive advantage to Curtin researchers, with 50% of our effort directly contributing to research outcomes by 2012.* This helps determine real action priorities when there are competing demands which are all worthwhile. Finding a clear indicator of success can be a challenge.

The strategies are what we are more familiar with. Strategies are general in nature and are subject to change with circumstances. During our starting phase CITS eResearch Support had three broad strategies. To help us enhance research outcomes we needed to *understand research practice and research needs.* We also needed to *connect researchers to suitable resources* and *support the unique needs of researchers.* At the time an overarching strategy for Curtin IT Services was (and is) developing strategic partnerships and de-duplication of effort, so *within and beyond the University* was added to the 'connect' theme. In a social and utility computing environment we need to leverage the expertise and effort of those around us [2].



Figure 1: Vision Pyramid for Curtin IT Services eResearch Support

The tactics are the regular activities and projects undertaken and can be quite numerous. CITS eResearch Support activities are categorised by the themes *Conversations*, *eResearch Projects (Research Enabling Infrastructure and Research Project Collaboration)*, and *Research Technology Support* [3][4]. An example of how CITS eResearch Support enacted our vision, mission and strategy is the eResearch Toolbox [5]. The eResearch Toolbox allows researchers to find relevant resources within and beyond the University that enhance their individual outcomes regardless of discipline or

technology experience. This is achieved by implementing a transformation layer based on an abstract model of research practice developed by the author.

## AS A REFERENCE

This has proven to be a useful template for supporting researchers. In a recent exercise with Curtin University Library staff we found that replacing keywords in the CITS eResearch Support mission and strategy quickly developed a version that was useful for them. The resulting vision was quite different, as their ideal future state related to access to scholarly information rather how they expend effort, and some of the tactical themes were also specific to their expertise (e.g. Scholarly Resource Support). The experience highlighted how abstractly similar our efforts are toward a common objective like scholarly research. The template could be equally useful for Human Resources, Financial Services and other internal areas that indirectly contribute to research outcomes.

- Library: *Enhancing scholarly outcomes through the use and creation of information resources*
- Service Desk: *Enhancing productivity at the point of interaction with information and communication technology*
- Infrastructure: *Enabling flexible University operations through access to agile and robust technology platforms*
- Human Resources: *Enabling researchers; the most important research resource*
- Financial Services: *Keeping the financial blood flowing through our research brains*

The focus on research outcomes can be replaced by other university ends, such as learning or societal benefits. For example, a technical eLearning support team might have a mission of *enhancing learning outcomes through the use of information and communication technologies*. Ideally the independent functions that have been discussed (ICT, Library, HR, Finance, etc) would recognise the significant overlap they have in contributing to the university outcomes, represented by the vision, and beginning exploring where their respective areas of expertise can be combined to further enhance outcomes. This holistic approach begins to redefine organisational boundaries based on the principle of strategy determines structure [6], with a degree of service function aligned to service receivers while retaining optimum functional efficiency.

## AN ECOSYSTEM

Your descriptions and plans should contribute to, rather than align with, the vision of the next level of the organisation and reflect your position in an organisational ecosystem [4]. Each department is interdependent on those around. For example, CITS eResearch Support is dependent on the CITS Infrastructure, CITS Business Systems, CITS Project Office, CITS Administration and CITS Client Services. CITS eResearch Support and CITS as a whole is interdependent with other University organisations including Human Resources, Financial Services, University Properties, Office of Research and Development. The University (indirectly) and some units (directly) are interdependent with external organisations including iVEC, ARCS, AARNet, Microsoft, Cisco and Optus/Alphawest. They are equally dependent on us to some degree for them to meet their ideal objectives, even if they are not articulated (i.e. they may not know it!). Recognising the ecosystem enables you to be more specific about the purpose and contribution of your organisation and develop strategies and tactics that maximise the

## CONCLUSION

A clear and concise set of statements that encapsulate your purpose, direction, strategies and activities is an effective way to understand and share within your team and colleagues what you contribute to the organisation. And now the easy part, execution! A great set of statements won't help if you don't follow through and achieve results.

## REFERENCES (TBC...)

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2. Social/utility computing
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4. Peter Hicks eResearch Australasia 2010
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