1995 Annual Meeting Presentation

At our Washington D.C., meeting on August 31 the Roundtable used the experience of the National Archives and Records Administration (NARA) in strategic planning as a case study. Two NARA staff members who co-chaired the most recent strategic planning effort, John Constance and Sharon Fawcett, shared their experiences and perspectives. The history of strategic planning at NARA since 1992 was reviewed, as well as the strengths and weaknesses of the various NARA strategic plans.

Both speakers discussed at some length the process followed in developing the plans, and the role of the internal and external constituencies in the formulation of the plans. Key points revised in the presentations and during the question and answer period included the importance of mission/vision statements, identifying key strategic goals and developing effective implementation strategies. A vital point stressed repeatedly was the need for top management involvement and commitment to the process.

Products and Product Planning

Whether you manage a small archives with one or staff members or one of the largest archival institutions in the world, you are constantly faced with choices between competing ideas and priorities in relation to information products you will produce. A faulty decision-making process can result in products that fail to deliver the information needed by the user or that lead to more, not less, work for the staff. Those "finding aids" no one uses are the tell-tale signs of poor decisions! The high cost of utilizing the miracles of information technology has forced us to look carefully at how we choose to spend our dollars for product development. The Internet allows direct and almost instantaneous access to our products. We can no longer afford to create products that require an archivist for access or interpretation.

The Office of the National Archives of the National Archives and Records Administration (NARA) has established a study group for the purpose of learning about and examining questions related to archival information product planning and management. The results of this effort will be shared at the 1996 annual meeting in San Diego in a session on "Managing Reference Service: Products and Possibilities," chaired by Lisa Weber. Other participants in the session are Sharon Fawcett, who is chairing the Office of the National Archives Study Group and

Products and Product Planning (2)

Richard Szary, who is engaged in an analysis of archival information delivery in anticipation of a redesigned reference center at Yale University. Comment will be provided by Reynolds Cahoon, an expert in product and service management.

For purposes of this study, the National Archives Study Group has defined a product as any "tool" that facilitates awareness and use of records. It is easy to acknowledge the merits of product planning but the difficulties are always in the details. In the process of devising a model for product planning the Study Group addressed numerous concerns. Unit heads and staff were very clear about needing to be able to produce low cost finding aids that expedited the reference process without engaging in an administratively burdensome process that could take more time than producing the product. Creative ideas from all levels of the organization needed to be welcomed and encouraged in an open, non-intimidating process. There needed to be broad access to information about planned and existing products. The Office of the National Archives needed to engage in a coordinated product development process. Before developing a product, we needed to be clear about the users, the need for the product and how the proposed design would meet those needs. Products in electronic format needed to be functional in NARA's information technology environment.

The Study Group recognized that we needed to learn how to critically examine the products NARA has produced from the user point of view so that we could better understand the kinds of products users need and the information that needs to be a part of these products. Better product planning means institutionalization of an approach that requires user input in determining products and product requirements. In the future, in a federal environment, outcome measures are more important that output measures. How users perceive our finding aids will be more significant than the number of finding aids we produce. Finally, the Study Group recognized that product management does not end with the creation of the product. Products must be managed throughout their life cycle which requires that each product is the responsibility of a product manager who ensures that products are up-to-date, in-stock, quality tested, evaluated, and retired when no longer needed or used.

The examination of these questions is still in progress. The Study Group has produced a preliminary model for a planning process. This model and the results of our testing will be examined and shared at San Diego.

TQManager Reviewed

Schmidt, Warren H., and Finnigan, Jerome P. *TQManager:
A Practical Guide for Managing in a Total Quality
Organization.* San Francisco: Josey-Brass
Publishers, c1995. 196 p. ISBN 1-555-425-593.

This book will be of interest to archivists serving in
supervisory and planning capacities. The authors intended their
work to be read by a broad spectrum of professionals. Schmidt
is professor emeritus of public administration at the University
of Southern California; Finnigan serves as human resources
manager for Xerox Corporation's Systems Competency Unit.
TQManager is divided into three sections. The first section
looks at Total Quality Management. The second examines five
aspects of TQM (creating a receptive environment, cultivating
teamwork, managing by fact, establishing rewards, and
emphasizing continuous improvement). The final section offers
practical advice for the TQ manager.

A proactive, global approach, TQ requires a fundamental
shift in thinking on the manager's part. The authors succeed in
showing why TQM is essential in reshaping the organization. A
well written introduction, *TQManager* includes a glossary and
easily understood charts. Novices will especially appreciate
the annotated bibliography of works categorized by such TQ
topics as quality, teamwork, and continuous improvement.

Articles and Reviews Welcome

The Management Roundtable newsletter welcomes articles about
management strategies and practices implemented in archival
institutions and reviews of books concerning management and
management-related topics. Please send articles and reviews to
Casey Edward Greene, Editor, Rosenberg Library, 2310 Sealy,
Galveston, TX 77550.