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Capturing Snapshots in Time

Environmental Scanning as an Ongoing Process

In 2013, I conducted my first official environmental scan. It was with a team that was developing services and creating the vision for researcher support at the Ohio State University Libraries. The eventual Research Commons Task Force recommendation highlighted services and support to invest in along with areas better served by other campus units. At the time, the group was given a couple of examples of environmental scans that had previously been completed, but there were no detailed instructions to follow or specific approaches that were commonly known by the group. In fact, many members of the group were familiar with environmental scanning only as part of a strategic planning process rather than for developing new services. In our process, the task force focused on assessing scholars' needs and practices through both informal and formal methods, along with monitoring the larger trends affecting higher education to respond to evolving researcher practices, design innovative services, and enable research partnerships.

Upon reflection and subsequent use of environmental scans, I realized that my background as a subject librarian had provided a framework and informal training in environmental scanning techniques. Though I have subsequently received formal training in storytelling and advocating for resources, the process of scanning the environment has always been embedded both in how I approach planning services as well as a practice I try to instill into all of the members of my Research Services department by encouraging an intentional, user-focused service orientation to our work. We aim to be engaged partners with faculty and other research support providers around campus to advance the research, teaching, and learning missions of the university. Therefore, for each additional area of research support that is added to my department (so far, data management support, data visualization, GIS, digital humanities, research impact, research data support, and publishing and repository services), staff have completed their own environmental scans. Although I think generally libraries have steps of the environmental scanning process built into our nascent infrastructure, few rarely take a systematic process for generating a complete picture to inform future service/support development.

Why Environmental Scanning?

Environmental scanning—the practice of taking a step back and reviewing the context of a system, the key players, similar services available elsewhere, and how information/resources/money flows through the system—provides a holistic view upon which recommendations

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can be made. Although this approach has been a mainstay in library strategic planning processes,[1] it is less prevalent in planning ongoing work. This process has many different names depending on the field: a traditional SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis from the business world,[2] capture planning in the realm of research development offices,[3] landscape analysis for entrepreneurs,[4] or competitive intelligence for our colleagues in special libraries.[5] Overall, an environmental scan typically has both an internal and external focus. It concentrates less on what the competition is doing and more about a snapshot of current practices. It is an approach used to inform local strategic planning and provides a way to gather information about the local environment to make more informed decisions.[6]

In libraries, there are many stakeholder perspectives to keep in mind while designing services, delivering collections, or planning future projects. For this reason, having a clear understanding of the environment will allow those developing strategies to stay informed of their users' needs as well as anticipate any barriers present that may interfere with a successful implementation of the vision. For example, in my work as a liaison, scanning the environment helped inform my collection development to know the research specialties of my faculty as well as program offerings at the graduate and undergraduate levels. I gathered information about the courses where I offered instruction, examined the course catalog to identify additional areas for inroads, and compared with colleagues at other institutions who were partnering in similar courses.

I quickly realized that my liaison departments maintained lists of both their peer and aspirational programs, and they were happy to share that information. I could then use that information to compare our collections and approaches to outreach and even network with librarians at peer institutions to understand how they were thinking about the ever-changing approach to offering support to their constituents. Overall, having a bird's eye view of my department allowed me to take a holistic approach to the support I offered. It also became a technique I employed at least every three to five years as the departments evolved, campus areas of interest changed, and my approach to librarianship matured.

Key Aspects of an Environmental Scan

Though the specific areas that are captured in each part of an environmental scan may vary, they typically include an executive summary, an introduction, a background or a little history, literature review, conversations with or information gathering on/about key stakeholders (both internal and external), a list of hypothesized future directions, a set of recommendations, and appendices of additional information. I'll now cover each area in greater detail to explain why it is important to the overall structure.

The executive summary should provide highlights of the entire report. It will summarize the recommendations and provide touchpoints for the reader. If it were a journal article, the executive summary would serve the function of an abstract.

The introduction will orient the reader to the report, what you intend to convey, and how the report will be structured. This may blend some of the areas related to history and background as well. It may highlight what will not be covered in the report or set the context of what else is happening in the libraries or on campus at the time of the writing. This section should detail the timeframe for the report and capture any co-authors who are instrumental in its creation.

The background section may vary in length. It is not necessary to identify all of the iterations of services until now, but it is intended to provide context related to the support that will appear in the future directions or set of recommendations. This area may also serve as a place to highlight gaps in current support.

In terms of the literature review, it is possible to have this section merge with history or with information gathering. This step allows you to contextualize the snapshot in time, communicate how greater campus trends affect library work, or highlight other studies that argue for a similar approach.

For the information gathering stage, you should contact similar service providers on campus or identify peer institutions who provide similar support. Key stakeholders may be internal to the library, on your campus, or at other schools. One good question to ask as you're developing a list of other individuals to interview is to end the time with, "Who else should I contact to gain a deeper understanding of . . ." In this way, the key stakeholders will alert you if there are additional stakeholders that are missing from your list. Although you could create a set of questions to ask everyone, typically you will have a custom list of questions to ask based on the background information sleuthing you have already done of their website or service catalog. Take good notes at this stage because you will be synthesizing trends or themes that emerge from these conversations.

The next stage is future directions and/or recommendations. These areas likely will emerge based on all of the information you have gathered in the other sections. First you will want to clearly articulate the change you are proposing. It could be a new workflow, set of services, or a way of framing your own work based on what you have learned from the previous steps. If the proposed change is large, needs financial support, or requires additional staffing resources, you'll want to make sure you align the vision in this section with the ask for resources. Recommendations you suggest should be actionable, achievable, and proposed with a timeline in place. However, they do not necessarily all have to be implemented by you alone. For larger organizational changes, new services, or stopping existing services, recommendations will require multiple inputs to ensure their success. With these larger changes, it would be advisable to preview recommended changes with others at your library to ensure they are on track, to anticipate any pushback that might occur, and to generate buy-in to the proposed approaches. Based on the feedback, you may want to adjust the recommendations or perhaps seek input from additional stakeholders.

The appendices number and length can vary greatly. Any information that can be referenced in the report but that is not integral to the proposed changes should be moved to an appendix to streamline the reader's experience. This could be summaries of stakeholder interviews, figures from comparing your institution to other peer institutions, or summary snapshots of similar programs offered elsewhere. This section provides additional context for the recommendations that are offered, but that may be too detailed for the main report.

Environmental Scanning for All Areas of the Library

Everyone who joins my team who is inheriting a service, starting a service, or rethinking a service sets a goal of conducting an environmental scan. I feel this is so crucial for each program area because it provides a time to pause and gather resources, reflect on the current state of activity, and make recommendations for future approaches. It provides intention to the planning that is forthcoming. It clearly addresses the expressed and uncovered needs that

exist and responds with support that has the potential to scale. It is beneficial to the department as a whole as well because it allows us to anticipate emerging staffing needs, articulate demand, benchmark available support at peer institutions, and intentionally plan for the future. Although many have used these reports to inform their own processes and approaches within the department, the digital humanities librarian used this opportunity to share her approach with others in the profession.[7] In writing this article, I have realized that our staff turnover has matched the three to five years recommendation for repeating an environmental scan. Others who have remained in the department have integrated mini-snapshots into their ongoing approach for monitoring the ever-changing landscape on a busy academic campus and have opted for an iterative approach to recommending ongoing changes.

Conclusion

In thinking about who in libraries should employ environmental scanning as part of their normal planning process, my answer would be anyone who wants to deepen their understanding of their constituents, those who want to think intentionally about existing workflows and what resources they are employing, and anyone who is designing new services or redesigning existing processes. Environmental scanning provides a snapshot in time by looking at current practices, documenting current trends, examining what others in the field are doing, and making recommendations for changes to existing practices or addressing gaps. It may confirm that approaches already in place are exemplary. In short, it notes what makes us unique/special/different within our own local context, what aspects are the same as peers, and what ought to be modified for efficiency. The process provides a holistic view that will hopefully shed light on strategic directional changes, as needed. Therefore, it could be a useful tool for those in libraries to consider adding to their toolkit in areas outside of the strategic planning process. �

Notes

1. Ann E. Prentice, "The Environmental Scan," *College & Research Libraries News* 50, no. 8 (1989): 713–17, https://doi.org/10.5860/crln.50.8.713.

2. Wikipedia, "SWOT analysis," last modified August 17, 2023, https://en.wikipedia.org/wiki/SWOT_analysis.

3. Red Team Consulting, "Transitioning from Capture to Proposal – What's the Big Deal?" 2022, https://redteamconsulting.com/2022/12/15/transitioning-from-capture-to-proposal/.

4. Max Miller, "How to Conduct a Nonprofit Landscape Analysis," LinkedIn, 2021, https://www.linkedin.com/pulse/how-conduct-nonprofit-landscape-analysis-max-miller-mpp/a.

5. Zena Applebaum, Philip Britton, and Alysse Nockels, *A Practical Guide to Competitive Intelligence* (Mt. Laurel, New Jersey: Special Library Association, 2022).

6. Kendra S. Albright, "Environmental Scanning: Radar for Success," *Information Management Journal* 38, no. 3 (2004): 38–45, https://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.983.8496&rep=rep1&type=pdf.

7. Leigh E. Bonds, "First things First: Conducting and Environmental Scan," *dh+lib,* January 31, 2018, https://acrl.ala.org/dh/2018/01/31/first-things-first-conducting-an-environmental-scan/.