IMARK

Module
Investing in Information for Development

Information Strategy

Lesson 1: The Features of an

Information Strategy

Learner Notes

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This lesson is part of the IMARK Module on "Investing in Information for Development". The Module contains six units. The unit on "Information Strategy" comprises three lessons:

> Lesson 1: The Features of an Information Strategy
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> Lesson 2: Developing an Information Strategy
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> Lesson 3: Implementing an Information Strategy

This course is available in self-paced e-learning format on CD-ROM and the Internet (www.imarkgroup.org).

Learning objectives

At the end of this lesson, you will be able to:

- define what an Information Strategy is;
- recognize the relationship between the different types of strategies in organizations;
- be aware of the benefits of doing an Information Strategy.

Introduction

A major challenge for any organization is to plan for the future, making the most of people and resources available.

In doing so, organizations must adapt to external transformation, which is the major factor driving the need for them to change. It is possible to exploit the positive effects, and avoid the negative effects of external change by planning ahead.

When planning ahead, we must consider information itself as an essential asset, just like people, buildings, equipment or funds. As appropriate strategies are developed for these resources, likewise a well planned Information Strategy becomes extremely important to the health of your organization. Often, managers use the word "strategy" interchangeably with the word "policy".

However, we need to distinguish these terms:
- a strategy is a long-term plan of action designed to achieve a vision for the future;
- policies are rules of practice and procedure that define the ways in which resources are applied (i.e. operations and procedures) in order to achieve the strategic objectives.

Policies, therefore, should be developed in relation to strategy.

We can talk about an "Information Strategy" because information has strategic significance. Let's see what this means.

What is strategic about information?

When considering the ways in which information is managed and used, we need to think strategically, because:

1. Without information, your staff and stakeholders will not know what they need to do or how to do it.

2. Whatever your staff "do" will almost always involve collecting, exchanging or processing information.

3. Information guides decisions, and particularly the important ones that impact in the future.

> - For instance, the type of computer system or software you buy now may affect many other areas of operation for years to come.
> - Expanding your physical library services with a "virtual" library system may improve access to information for your staff, as well as avoid the need for them to spend time going to the library.
>
> One purpose of strategic planning is to identify and address long-term issues that may arise from any decision.

4. Information is a fast-changing area of work with many new opportunities, which can imply substantial investment.
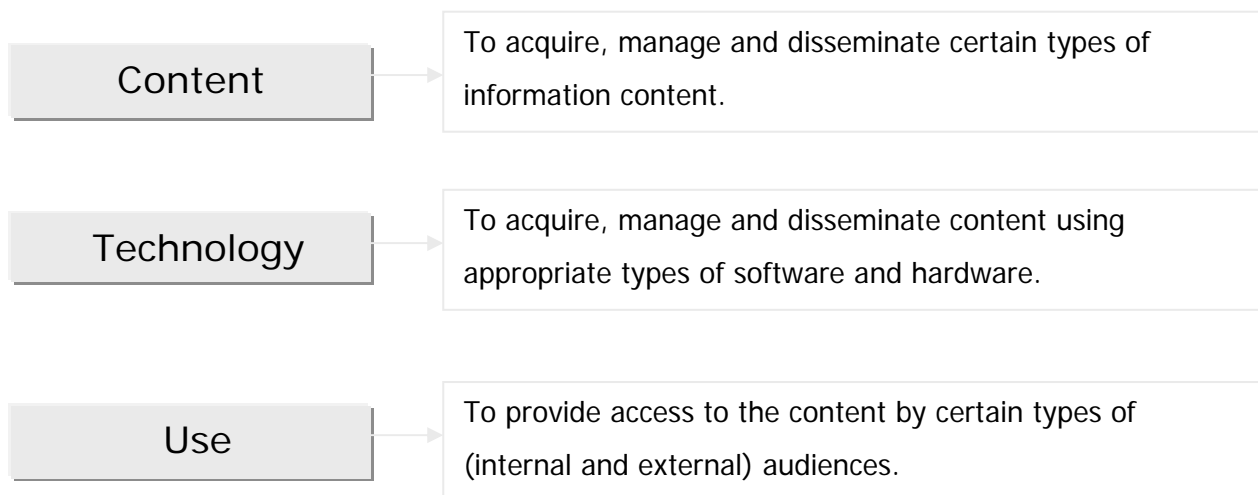
> - Strategic thinking is particularly important at times of change, because unless you have a clear idea about what you are trying to achieve, it can be hard to assess the many new opportunities presented in a consistent way.
> - Large investment decisions are nearly always strategic because if you have invested resources in one area, it usually means you are less able to invest in another.

What is an Information Strategy?

A strategy is a deliberate and planned approach to achieving a vision for the future, which is based on sustainable features and resources of the organization.

An Information Strategy should start from objectives and describe ways of achieving them. Here are some sample objectives for the three important generic types of subjects in an Information Strategy:

Content	To acquire, manage and disseminate certain types of information content.

Technology	To acquire, manage and disseminate content using appropriate types of software and hardware.

Use	To provide access to the content by certain types of (internal and external) audiences.

These objectives are specific to information-related matters, and they are clearly not mutually exclusive. They should also be measurable.

But what are the properties of an Information Strategy?

1. The strategy is concerned with the direct information needs of the organization.

2. It offers a framework with a direction and priorities that can guide staff and other stakeholders in managing their various information-related activities. Also, it helps them to understand the relationship between them.

3. It is formalized and presented as a document, which sets out to senior managers, staff and other stakeholders the vision of where the organization is going and the issues/options it needs to address to get there.

4. Once approved, it is the basis for planning, managing and evaluating information-related activities over a significant period of time – typically two to three years.

5. A strategy will need to be reconsidered after two years to address new "opportunities" and "threats" in this fast-changing field.

The strategy document

We just said that an Information Strategy is formalized and presented in a document.
But what should this document look like? There is no single correct format, since it may vary according to the organization. However, typically it should be concise (10-15 pages plus annexes) and should contain the sections shown in the following table (which are common to many strategies):

Section of the document	Description
EXECUTIVE SUMMARY	Quick overview of the full-length report.
BACKGROUND	Explanation of the context (overall organizational strategy) and the strategic issues faced (key external factors and any explicit constraints) related to information.
SPECIFIC OBJECTIVES	Objectives that are related to information management and systems for tasks such as acquisition and dissemination.
OPTIONS	Review of the range of alternatives and their relevance to the strategy and risk factors, leading to identification of priorities.
OUTPUTS	Outline of key information products and services to be acquired and Disseminated, and the internal/external audience(s) and markets for them.
REQUIREMENTS	Overview of investments, organizational structures, resources (e.g. information technology) and skills needed.
CONCLUSIONS	Recap and rationale behind the options you have chosen.
IMPLEMENTATION PLAN(S)	Specific steps to be taken in order to implement the strategy, with a schedule and assignment of responsibilities.

Whatever format you choose, when producing an Information Strategy you are delivering a product. Therefore, you need to make sure that it:

1. **Achieves its purpose.**

A strategy may have several aims. It may be used in order to argue a case to a skeptical group of managers or staff. It may have wider promotional value to an organization as it explains what it is doing to external stakeholders. You need to identify these purposes and shape the product accordingly.

2. **Is aimed at the right audience(s).**

This affects the style and the presentation of the strategy. Is it being written for colleagues within the organization, or for presentation to the Minister or external stakeholders?

3. **Is in the right form(s).**

If you are presenting it at a meeting, you will need to give careful thought to making an effective presentation and be aware that the document may be used as little more than a record of your presentation. Especially if it is a long document, not all stakeholders will read it entirely – have you prepared summaries, press releases and other versions in appropriate languages and styles?

4. **Is produced cost-effectively.**

Strategies are of variable scale and cost, and need be produced in a cost-effective manner. There is no point using one year's budget to produce a three-year plan.

Nor will anyone want to read 40 pages of argument if the relevant information can be provided in five.

5. **Looks good.**

However brief and simple the document is, it must still be well presented and substantive.

The relationship between the Information Strategy and the Corporate Strategy

Now that we know what an Information Strategy is, and how it is presented, let's consider the relationship between an Information Strategy and the overall strategy of an organization.

How does your Information Strategy relate to the overall strategy of your organization?

The Information Strategy should not be an independent entity. It needs to be related to the goals and activities of the organization.
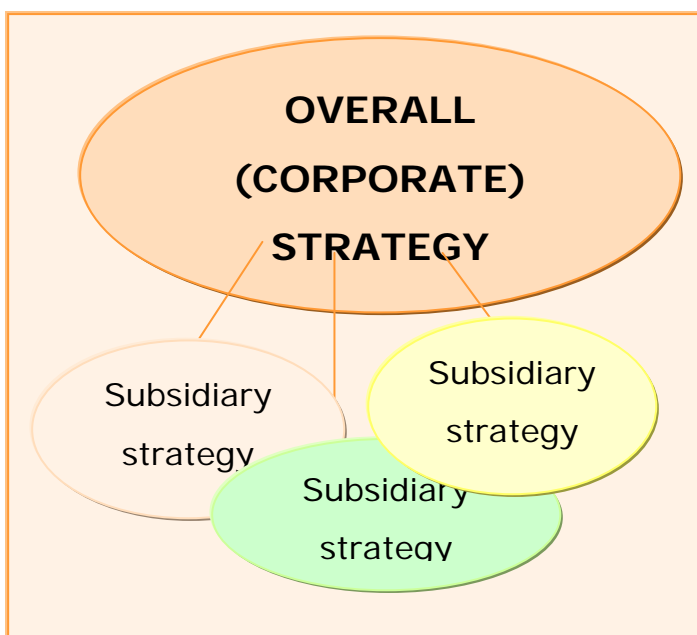
Many organizations have an overall (corporate) strategy.

In the case of most organizations, an overall strategy normally considers how general objectives of development-related outcomes can be achieved.

Within the corporate strategy, subsidiary strategies can be developed in one of two ways:

- for organization units – e.g. divisions, departments, etc.
- for functions/themes – e.g. human resources, information.

Subsidiary strategies must relate to the organization's overall strategic objectives.

If your organization has an overall strategy, you can identify the information activities that are important to achieve its general objectives. On the other hand, through your Information Strategy you should be able to identify:

- the dynamics of how such work is to be introduced and managed;
- the ways in which different pieces of information work may relate to one another.

Therefore, your Information Strategy will become an essential link between the broader strategic goals and the more detailed information-related processes in your organization.

If your organization does not have an overall strategy, there will generally be other sources of policy which you can draw from as you consider your Information Strategy.
Some examples of such sources are:

- **Five-year plan for agriculture**
- **National agricultural policy(ies)**
- **Your own organization's policy documents**
- **Statements from your Director General or Chief Executive**

The sources closest to your own organization will generally be the most valuable. Policy at a national level may only apply if you work in the Ministry of Agriculture or its equivalent.

Developing an appropriate Information Strategy

We just considered that an Information Strategy should be relevant to the overall strategy of an organization. It should also provide a framework for procedures and processes related to an organization's information activities.

Let's look at an example of a real-life situation:

The Secretary of Agriculture is worried about the performance of the Ministry's departments. He sees that the separate and uncoordinated development of various information systems and technologies has led to several problems. Therefore he decides to analyse the situation and identifies several issues that need to be taken care of. The problems he has identified fall into three categories:

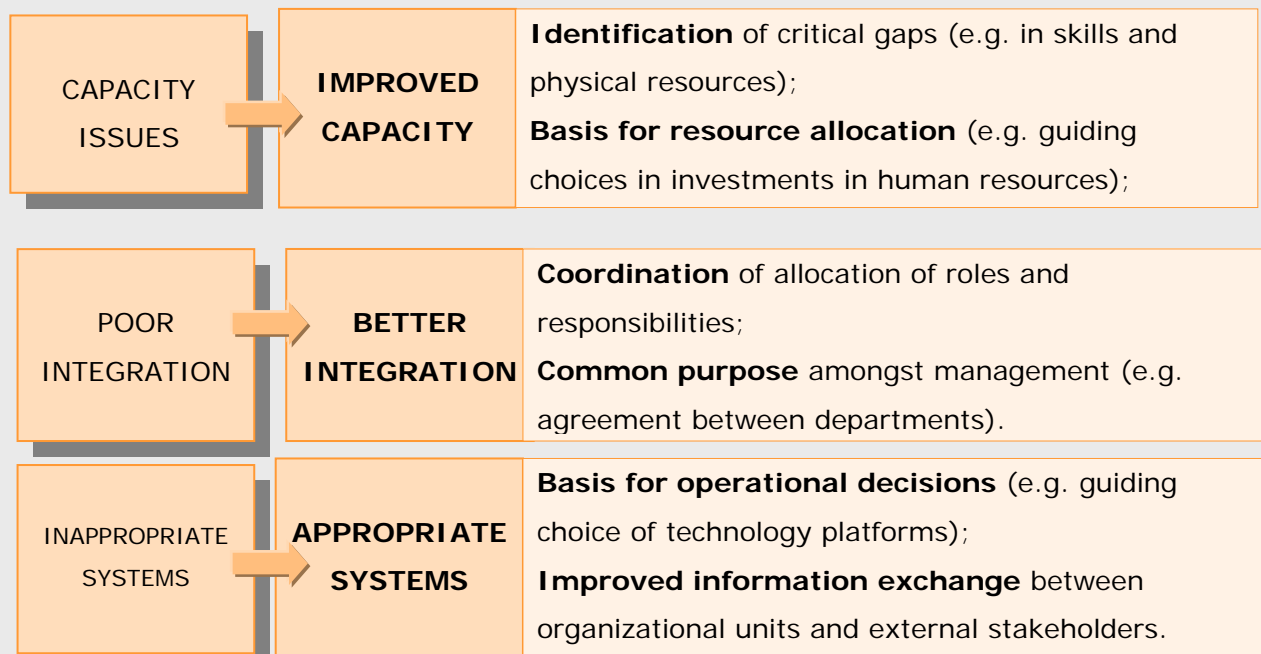|	
CAPACITY ISSUES	**Competing demands** for resources have been hard to resolve without a strategic framework to set priorities. Also, limitations in human resources have restricted options for the development of information products and services.
POOR INTEGRATION	**Poor integration** of the various information systems in the different departments has led to duplication of information activities, inaccuracy of data/content and delays in development and dissemination of information products and services. Poor integration has also inhibited the flow of information across the Ministry.
INAPPROPRIATE SYSTEMS	**Limitations** in information systems have also restricted options for the development of information products and services.

He decides that an Information Strategy will help resolve these problems, with the following outcomes:

CAPACITY ISSUES	→ **IMPROVED CAPACITY**	**Identification** of critical gaps (e.g. in skills and physical resources); **Basis for resource allocation** (e.g. guiding choices in investments in human resources);
POOR INTEGRATION	→ **BETTER INTEGRATION**	**Coordination** of allocation of roles and responsibilities; **Common purpose** amongst management (e.g. agreement between departments).
INAPPROPRIATE SYSTEMS	→ **APPROPRIATE SYSTEMS**	**Basis for operational decisions** (e.g. guiding choice of technology platforms); **Improved information exchange** between organizational units and external stakeholders.

The benefits of doing an Information Strategy

The issues the Secretary of Agriculture has addressed are only a part of the analysis needed to develop an effective Information Strategy. Before considering in more detail some of the methods for building up your strategy, let's look at the benefits.

A good Information Strategy should be of direct practical benefit:

1. **To you.**
   So that you have a clear idea of what you want to do and why, and you have identified and addressed issues of how to achieve goals.

2. **To your staff.**

   So that they are well aware of the organization's goals and how it is intended to achieve them.

3. **To your Organization.**

   So that priorities have been identified and there are clear outlines for future work – for instance to:

   - assess new opportunities and threats;
   - undertake more detailed strategic planning; and
   - and make investment decisions.

Further potential benefits of an effective Information Strategy are:

- it can make evaluation easier by showing how a series of information initiatives are supposed to support each other in achieving some defined goal (to make evaluation easier, a strategy should have within it proposals and methodologies that show how progress will be assessed); and

- it is an excellent way of making your stakeholders more involved. At the very least, it will demonstrate how your organization's work interacts with them. It also offers you the choice of involving them actively in the planning process, thereby benefiting from their input and improving their feelings of ownership of the resulting work.

Summary

Information is an essential resource requiring strategic planning: therefore, a well-planned Information Strategy becomes extremely important to the health of your organization.

An Information Strategy is presented in an important document indicating the vision of where you want to go and the issues you need to address in order to get there. It offers a framework with a direction and priorities that can guide staff and other stakeholders in managing their various information-related activities.

An Information Strategy provides a link between the overall strategy and the handling of information on a daily basis.

If your Information Strategy is good, it should be of direct practical benefit to you, to your staff and to your organization.