



FUTURE GOAL SETTING IN OPEN COLLABORATION

Case: Scientific Koha Finland
roadmap for 2030

Pekka Uotila

PEKKA UOTILA

My interest: Organizations as communicative constructions

Education: PhD in Applied Linguistics

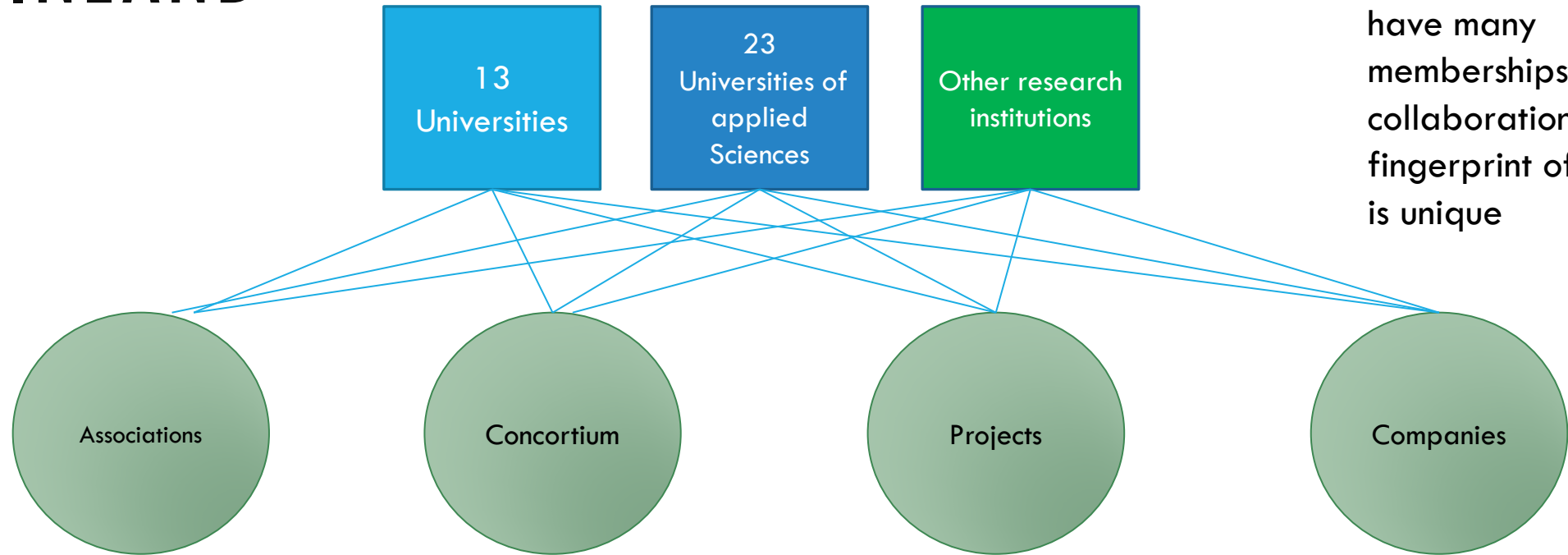
Current position: Manager, Information and Publication Services
South-East Finland University of Applied Sciences

Koha experince: steering group member of the of Scientific Koha Consortium in Finland since 2021 -> my approach is managerial

Active player as the Scientific Koha Finland roadmap for 2030 was created.

This presentation is a critical reflection of the goal setting process from a viewpoint of a participant. I compare our long term planning process with some theories about making a strategy.

COLLABORATION BETWEEN UNIVERSITIES IN FINLAND



All heigher education and research institutions have many memberships = the collaboration fingerprint of each HEI is unique

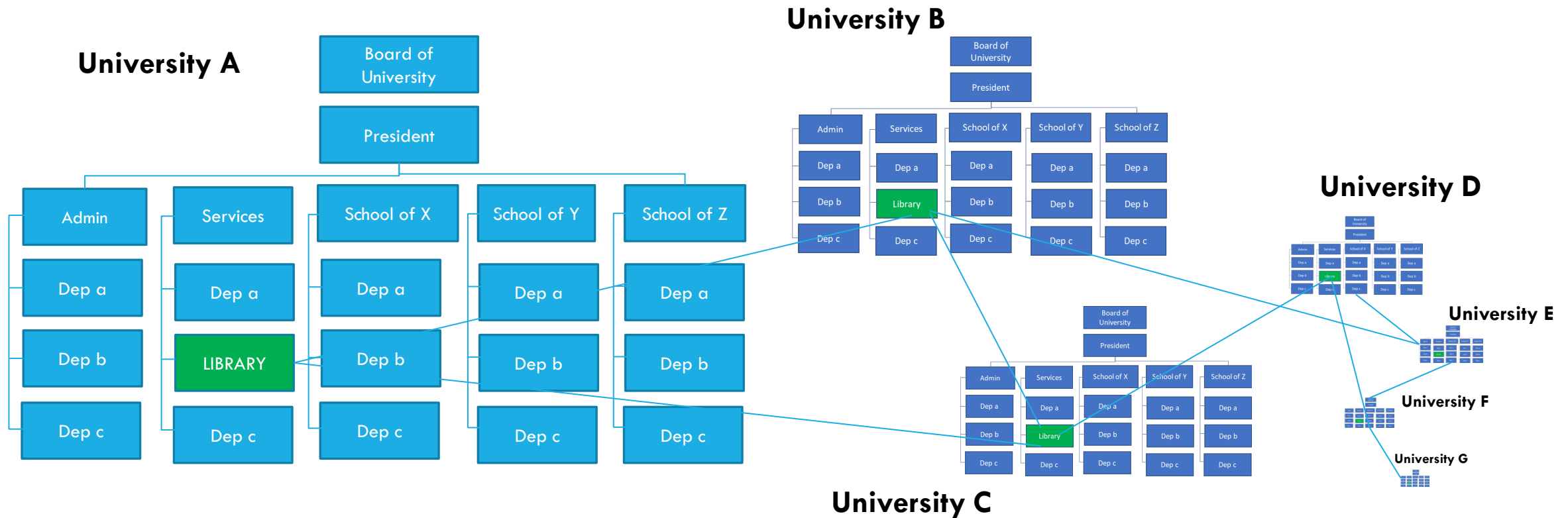
e.g. Council of **Rectors of Finnish Universities** – 13 members
Rectors' **Conference of Finnish Universities of Applied Sciences** – 23 members

e.g. **Peppi** - ecosystem for (Higher) Education Institutions education management – 31 members
The scientific Koha Finland – 17 members

e.g. **Digivisio 2030 programme** – 38 members

e.g. **CSC – IT Centre for Science**

SCIENTIFIC LIBRARIES IN THE HIGHER EDUCATION SYSTEM IN FINLAND



WHY LONG RANGE PLANNING IN A OPEN CONSORTIUM?

Open consortium is a loose social construction. Therefore: all documentation is vital – also in "soft matters" like goals and values

Library managers (all managers) need a clear (and very simple) vision of each services they are using and bying in order to understand the general picture of all services and their interconnectivity – to have a documented roadmap makes sense

STRATEGIZING

OR LONG RANGE PLANNING OR FUTURE GOAL SETTING

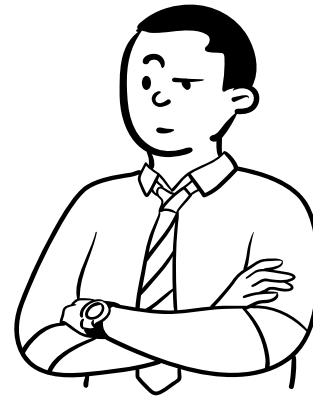
A process where **matters of concern** are transformed **matters of authority**.

Matters of concern

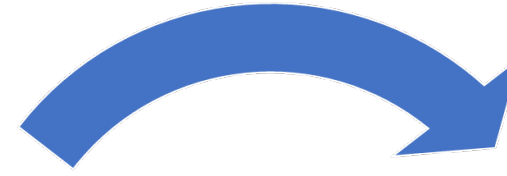
In daily working communication there are things that drive participants defend or evaluate a position, or justify or oppose an objective.

Matters of authority

is a matter of concern that come to legitimize certain courses of action. In this way the matters of concern become collective concerns and gain authority.



Matters
of
Concern



Matters
of
Authority



QUESTIONS

1. What are the matters of concern in a open Koha community and how they are translated into matters of authority?
2. What can we learn from the long range planning process?

CASE: SCIENTIFIC KOHA CONSORTIUM FINLAND ROADMAP FOR 2030



17 scientific and special libraries



Open consortium make decisions on use, maintenance, and development of Koha



Since 2018.



The National Library of Finland provides software development and maintenance services.



CSC – IT Centre for Science Ltd provides server platform services.



The open consortium is literally "open." It has no legal, independent status. Its operations cannot be directly compared to a company or association.

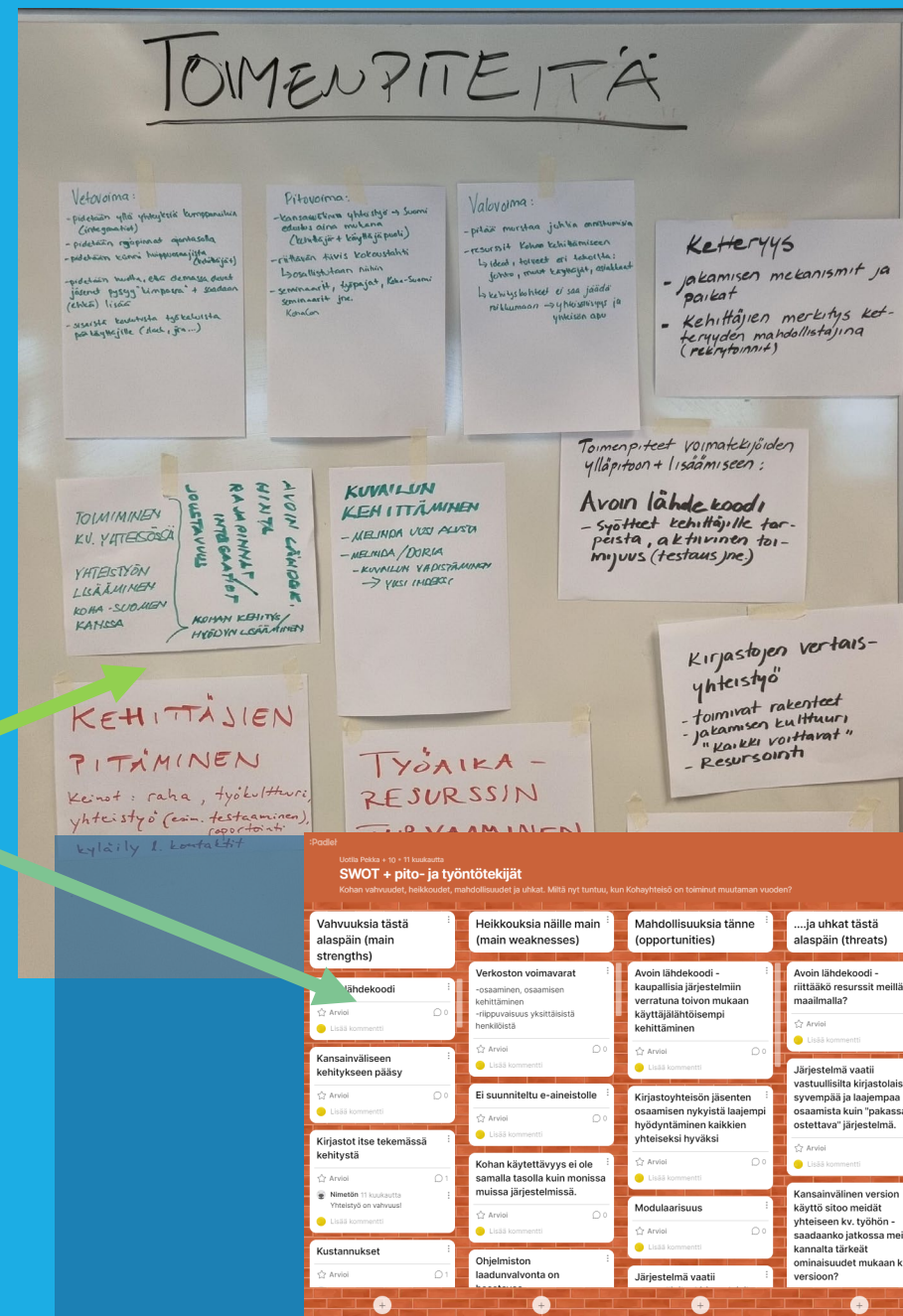
KOHA — LONG RANGE PLANNING

By spring 2021, when almost the entire steering group of the of Scientific Koha Consortium in Finland changed at once, it was realized that ensuring the continuity of the open consortium's operations required the participation of as many members as possible in collaborative development and clarifying the situational picture.

The general meeting of Scientific Koha Consortium in Finland decided to initiate future-oriented work in autumn 2021, aiming to hold a series of workshops and consider **"the direction we are heading and want to go."**

Three workshops were organized in 2021 – 2022

In each workshop there were at least 30 participants, staff members and managers



SWOT

The results of the workshops were prioritized, summarized, to create a SWOT-> MATTERS OF AUTHORITY

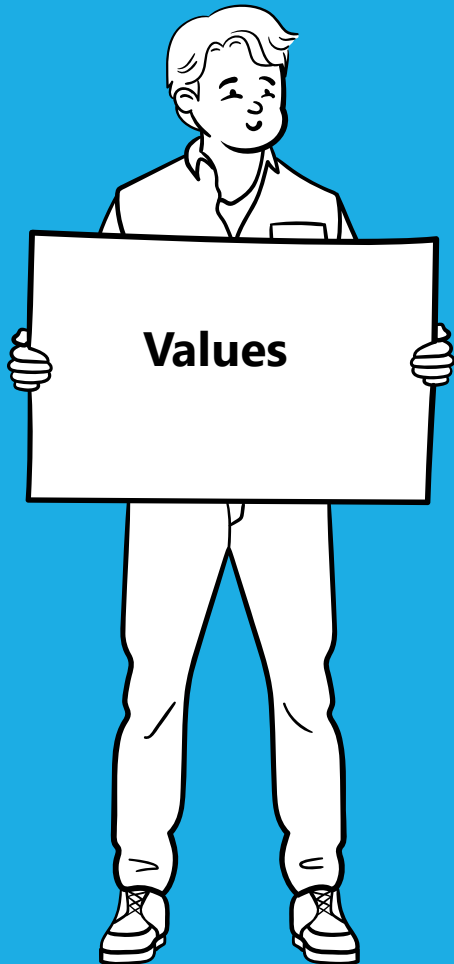
STRENGTHS	WEAKNESSES
<ol style="list-style-type: none">1. system adaptability2. libraries' active involvement in system development3. strong collaboration and mutual trust4. relatively low direct costs	<ol style="list-style-type: none">1. not designed for managing electronic resources2. management of layered code3. required human resources for community development and maintenance
OPPORTUNITIES	THREATS
<ol style="list-style-type: none">1. modularity of the system,2. user-centric development3. expertise of the international coding community4. sharing of collective knowledge for the common good	<ol style="list-style-type: none">1. alternative arrangements might be necessary for electronic resource management.2. potential inadequacy of resources for open-source development3. organizations potentially departing from the community

RETENTION, ATTRACTION, AND COMPELLING FACTORS

The results of the workshops were classified to identify the levels of matters of concern
AND
retention, attraction and compelling factors -> MATTERS OF AUTHORITY

	RETENTION FACTORS	ATTRACTION FACTORS	COMPELLING FACTORS
System level	Opportunity to influence the development of international Koha.	Price; Transparent costs, a view of what kind of costs are coming	Agility – direct contact with developers
Community level	Peer-to-peer cooperation between libraries	Open source: ideology, transparency, agility, customization	Community - works well between libraries and between libraries and developers
Customer level	Stability	Intersystem integrations	Development - opportunity to influence

Eventually the results of the workshops were used to define the shared values -> MATTERS OF AUTHORITY



1. **Openness**

Openness involves the smooth sharing of information and know-how

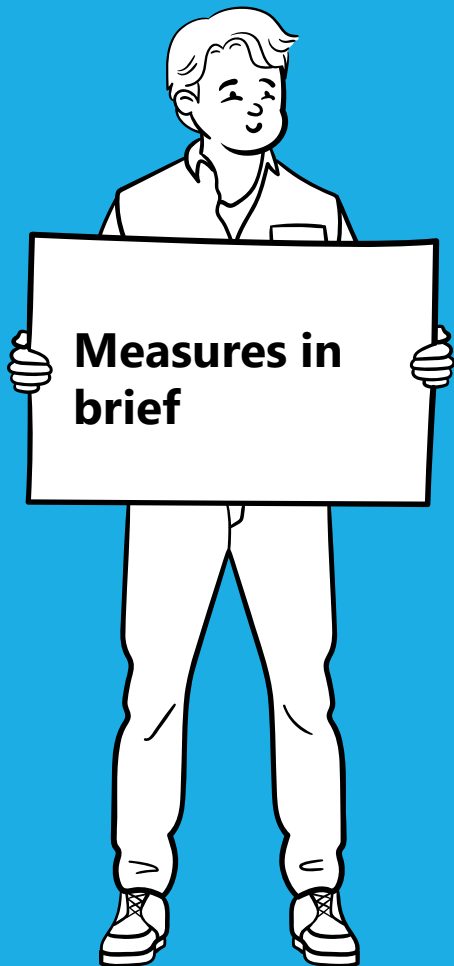
2. **Sense of community**

The contents of communality include a positive feeling of equality, mutual trust and a desire to share and take responsibility.

3. **Sustainability (ecology & economy)**

The Community wants to pay for a system that is sufficiently good and meets the real needs of libraries, and that growth and direction of development are the responsibility of the community and each of its members.

Eventually the results of the workshops were used to create a list of key actions -> MATTERS OF AUTHORITY



1. More attention to communication, especially so that we can be seen and heard outside our own community
2. Competence development within the Koha community
3. Consolidating cooperation with other partners
4. Internationality – increasing planning and widening participation so that main users and other members of the Koha community also actively participate in the development work
5. Technology development – the roadmap identifies concrete development targets that utilise Koha's modularity and the strengths of the developer community

WHAT DID WE GET?

Compared with the theories, we succeeded to create something that resembles very much a proper strategy.

Methods, like workshops, Padlets and SWOT are conventional tools that are commonly used in strategical processes to turn matters of concern to matters of authority.

The outcomes, like a list of future measures is a comprehensive, conventional strategy document.

The levels of strategy we defined, are very concrete for the daily activities of Koha community members, like the Koha library system itself and customers.

Soft issues, like values, openness and community seem to be important for the community there is clear need to get from the collaboration more than just a good LMS

The process itself was rewarding for the participants and helps the community to identify, what we are doing and where we are going to.

SOME LESSONS TO LEARN

(WHAT WE DID NOT MENTION IN OUR ROADMAP SO CLEARLY, IN MY OPINION)

If Koha was just a service, we would not have needed a strategy but a good deal with a nice salesperson.

Koha community is horizontally strong -> how to become vertically strong, as well?

We should have taken more seriously in consideration the macro level actors, For example, could Koha community have more active role in open science movement? Scientific libraries are very active actors to promote open science. Should we expand? Why? Why not? How?

From the management viewpoint Koha is

- **a community which provides a good library system and something else or**
- a cost-effective library management system that demands a lot of community management.

If Koha is considered just another Library management system without any additional value, the community management can become sooner or later a burden.

-> we need actions to make Koha (and other open solutions) even more attractive! How?

What is the additional value of Koha in the future (?)

THANK YOU!

