OFFICE OF LEARNING TECHNOLOGIES

PROJECT: Project #21021 **Remote Distance/Continuing Education - Information Support**
QUARTER: Q1 (April 1 - June 30, 2002)

1.01   PROJECT STATUS
1.1   Deliverables:
         a) Forecast Quarterly Deliverables:
         I.   Stakeholder's Forum (May 27-28, 2002)
         II.   Business Plan for Pilot Project (June-July 2002)
         III.   Select core suite of innovative information and learning technologies for testing (June - July 2002)
         IV.   Prepare to recruit Assistant Project Manager and library staff to participate in the pilot project.

         b) Actual Quarterly Deliverables:

I. Stakeholder's Forum
         The planning for the Stakeholder's Forum began in March with a draft program ready in early April 2002.
Planning continued throughout April and May in parallel with the continuation of data entry and analysis of the
three surveys (Libraries, Students, Faculty). The analysis and data from the surveys was compiled in a statistical
software package (SPSS) but approximately 1200 comments were entered on a spreadsheet, sorted and analyzed
separately. A summary document (discussion paper) for the student and faculty surveys was to provide the core
information for discussion at the Stakeholder's Forum and for that reason it had to be completed and published by
May 15th in order to be distributed to Forum participants in advance of the meeting. A copy of this document is
included with this report. The citation for this document, copies of which have been catalogued for the Novanet
database and deposited in the National Library of Canada and Legislative Library of Nova Scotia, is as follows:

Waddell, B.; MacGillivray, M.; MacLean, P.; Pace, G.; Roman, A.; and Birdsall, B. 2000. Discussion Paper
prepared for the Novanet Distance Education Stakeholders Forum - Mount Saint Vincent University, Halifax, Nova
Scotia, Canada. May 27-28, 2002. Nova Scotia Agricultural College, Truro, N.S.

         The Library survey interviews had been completed with the exception of one Library. When the interviews
were complete all the data was entered onto spreadsheets for analysis, and then a summary report prepared. This
report, completed May 24, 2002, was distributed as part of the Forum Registration Kit.

         Forty four people, including the Steering Committee and Administrative Assistant, were invited to the
Forum. Those invited were selected by each University or College in numbers that approximated the relative sizes
of the Institutions' Distance Education Programs. Nominees were selected by the Steering Committee member or
Liaison Person at each institution who had the final say on who was selected to represent their institutions.
Guidelines were prepared, so that we were able to maintain a balance of DE administration, DE faculty, DE
students, and Library staff. A copy of these guidelines is included with this report. There was no registration fee for
the Forum and all expenses were paid by the project. Of the 44 people invited to represent their institution at the
Forum, only two students were unable to make it due to transportation and other problems. A list of attendees is
included in the forum proceedings document.

         In order to stay within budget, we decided to reduce the number of external resource people for the
technologies that were suggested by the surveys; however, it was felt that at least one resource person should be
from another area of the country in order to provide participants with a better professional development
opportunity, to reinforce the credibility of Project objectives, and also because some expertise is not yet available
in Atlantic Canada.   Presenters included several from the Steering Committee, one from the Novanet community
not on the steering committee, one from Nova Scotia external to Novanet, one consultant with relevant experience

in the United States who has relocated to Halifax, and one from the University of Winnipeg.

Evaluations for the Forum were excellent to good, with many positive comments. It was especially important that the Forum was seen as a valuable and informative experience, because it is hoped that many of these people will either make up the pilot project teams or participate in other ways in testing and evaluation during the Pilot Phase of this project. A summary of the evaluations is included as an Appendix in the Forum Proceedings document.

II. Business Plan for Pilot Project (June - July 2002)
Method / Strategy: based on outcomes of the Forum, standard small business template
Contributors: Steering Committee (DE Working Group); DE student representatives
Time line: June-July 2002

The first step in preparing the Business Plan has been to prepare a summary of the presentations and discussions that took place during the Forum. This has been published as a proceedings, which will provide a workbook or handbook for pilot project teams as they plan the implementation of various technologies selected for the pilot. This document, copies of which have been catalogued for the Novanet database and deposited in the National Library of Canada and Legislative Library of Nova Scotia, was completed in mid-June and may be cited as follows:

Waddell, B. R., ed. 2002. Proceedings: Novanet Distance Education Stakeholder's Forum - Mount Saint Vincent University, Halifax, Nova Scotia, Canada. May 27-28, 2002. Nova Scotia Agricultural College. Truro, N.S.

The preparation of a Business Plan is a fairly onerous undertaking. In the academic library environment a business plan is not normally prepared, so that the benefits of this effort are not entirely clear; however, a draft business plan will be prepared during July to be used as a workbook, to be amended and revised with particulars as planning proceeds for the implementation of various sub-tasks within the pilot project, between September and December 2002.

III. Select core suite of innovative information and learning technologies for testing
Method / Strategy: DE committee to attend one technology conference; update literature review with technical information; based on the needs assessments recently completed.
Contributors: Steering Committee / Consultants as needed
Time line: June-August 2002

The Service Model suggested by the Forum was similar to that suggested by the Surveys, but differed in certain important ways. The Forum, after hearing of the experiences of the presenters and in the context of their own experiences, prioritized the technologies differently. They also chose among delivery options and advised on the 'cost(effort) - benefit' of different options. The participation of DE administrators and both DE faculty and DE students was especially valuable during this ranking, and they suggested approaches that might not have come out in a discussion among library staff alone.

Priorities selected were:

#1   Live Help/ Chat Research Assistance (offer also during extended hours)
#2   Discipline Specific Electronic Collections (e-books, e-journals with direct links to licensed material)
#3   Online Tutorials (online tutorial for Novanet, viewlets for Web pages, revise Novanet web page)
#4   Electronic Reserves (small pilot to compare costs, evaluate issues - print vs. online vs. CD)

Also:
Team Approach within the Consortium (include Library Staff, DE Admin, DE Faculty, IT Support as advisors)
Update Novanet Policies/ Procedures (expand Novanet document delivery, bar codes for DE students, patron ID)

Live Help/ Chat Reference Assistance: The highest priority for the Forum was Live Help/ Chat Research Assistance. This is the use of Chat software to provide online real time reference assistance to remote students and distance learners. We had believed that there would be a steep learning curve for students, but our consultant assures us that the students have an almost flat learning curve and only the library staff have a rather steep one. There was considerable discussion comparing live chat with an e-mail based reference support system. It was felt, in the context of the comments from students, that the particular needs of distance / remote students would be better met by using the chat software. The "Ask a Question" software developed at Grant MacEwan College in Alberta, was written specifically to manage reference support within a consortium. It is quite impressive, but relies entirely on e-mail. It was felt by the Forum that e-mail creates a barrier, as it is perceived that a question needs to be much more carefully articulated than chat, which is more of a dialogue in which questions do not have to be anticipated. In any case, chat reference uses e-mail as a back-up for those hours when the live service is not available. The two software options are HumanClick and LSSI. LSSI is a much more sophisticated software, but also very expensive and not yet adapted for a consortium environment. HumanClick is less complex and much less expensive but does not provide either transcripts of the session or statistics. There is a possibility of the Project taking over an existing license for the period of the pilot.

Discipline Specific Electronic Collections: It was felt that, at this time, a general core collection for all distance programs in Novanet, although possible for the term of the project very likely would not be sustainable beyond the project. This perception has not been tested or verified, but needs to be kept in mind. It was thought that we might instead identify several programs offered through distance education which are shared by several institutions within Novanet (business administration, nursing, education were mentionned) and develop "E-Course Packs" which have direct links to peer reviewed electronic materials already licensed by academic libraries. Our model might be the product "MDConsult" which is an electronic collection on CD of 40 textbooks and 50 journals for the health sciences, rented to students for $10 per month. It is a very popular core collection supporting the new "evidence-based health care" approach being used in nursing and medical programs.

Online Tutorials: It was felt that the most helpful initiative would be to develop a generic tutorial on using the Novanet system (catalogue, patron records, reserves, novanet express, keyword vs. browse searching of databases etc.) that could be shared by all Novanet libraries. In addition, it was felt that a new approach might be provided by "Carbon" software that allows the creation of very short 2-3 minute instructions (viewlets) that can be placed throughout a web site to provide user instruction where it is needed. The advantage is, with some experience, new viewlets can be created in about an hour, so editing and adding would be much less difficult than designing and maintaining a full information literacy course. It also was felt that the Novanet web site is so difficult to use that it is a considerable barrier for distance students. A complete revision with web pages tailored to the needs of distance education students needs to be undertaken.

Electronic Reserves for Recommended Readings: This was the number one priority for students; however, the Forum advised that the considerable resources needed to establish and maintain an electronic reserve system would be better spent on developing e-collections, particularly for the Humanities and Social Sciences. The labour involved is very considerable 1) scanning documents to create pdf files 2) editing and correcting the file when the original is pale or damaged, 3) mark-up in html required by distance students (pdf downloading with Adobe Acrobat from off-campus is impossibly slow), and 4) securing copyright permissions (a difficult and expensive task), and at the end of term or semester the materials must be deleted. It was recommended that a small test be made to compare the costs and problems encountered with print vs. online vs. CD as a means of handling reserves. This would provide a benchmark for Novanet in the future.

Team Approach: This can be included in the planning and conduct of the pilot, but it is hoped that this will become normal operating procedure when providing library services to distance education at most Novanet institutions. Involving all stakeholders in this project will provide a model for that change.

Updating Novanet Policies and Procedures to remove barriers for DE: This was seen as a task for the Steering Committee. Changes required will need to be articulated and documented very clearly and in great detail before submission to the Novanet Technical Advisory Committees (Lending Services functional groups first for evaluation, then to the NSOC Committee to be voted onto the priority list, then in time being included in the top 5 priorities for action.) Each item would need to be prioritized among many competing requests for improvements and changes. It is anticipated that this will take about 1 - 1 ½ years.

IV. Prepare to recruit Assistant Project Manager and library staff to participate in the pilot project.
Method / Strategy: Identify skills needed, benefits to be derived, publicity on project goals and objectives. Work with the Novanet Policy Board. Contact Dalhousie School of Library and Information Management. Formalize recruitment plan for Assistant Project Manager (ad, criteria, job description, interview questions etc.)
Contributors: Library staff at Novanet institutions, Steering Committee, Faculty at Dal Library School.
Time line: to have Assistant Project Manager in place by August 6, 2002

Some preliminary work has been done, but this task will be completed in July.

c) Variations from last quarter's stated objectives:

Unexpected Variations

In early April we received an invitation from the National Library of Canada in Ottawa to attend a "Canadian Virtual Reference Forum". Travel was subsidized by the National Library and by the Nova Scotia Agricultural College. The Project Manager attended this meeting to represent Novanet and the Distance Education Project, but also to network with people who are involved in, or planning to implement, one of the technologies that we expected to be included on the list for our Pilot Project. Another objective was to try and identify a resource person with experience delivering electronic reference services to be the presenter at the Stakeholders Forum. In this we were highly successful.

During the winter the Project Manager was invited to plan a session at the Canadian Library Association Annual Conference being held this year in Halifax, on the topic of recent developments in library support for distance learners. The Canadian Library Association is the national professional association for librarians. The session was to be sponsored by the Distance Education Interest Group. Of 10 proposals submitted from Atlantic Canada only two were accepted, of which ours was one. Feedback on the workshop was positive , e.g. "one of the

best sessions of the conference". The session was held on Friday, June 21, 2002 using a PowerPoint presentation outlining this project and our progress to date. Other presenters reported on related initiatives across the country. It was very clear that the Novanet approach has been unique in that the pilot has grown up out of the surveys and needs assessments, while in other projects the pilots are developed at a higher level and dropped down.

An unexpected outcome of the Forum was a closer relationship between Novanet and Acadia University, one of only two post-secondary institutions in Nova Scotia which are not members of the Novanet Consortium. The Acting University Librarian at Acadia contacted the Project Manager to see if they might participate in the Forum. Their problems are very similar, and their experiences and perspectives were helpful to our discussions. The Acadia Systems Manager was the presenter for Electronic Reserves.

In-kind contributions to date have exceeded expectations. The Project Manager was invited to be a consultant in the preliminary planning for the evolution of the Virtual Library Project of COPPUL (Council of Prairies and Pacific University Libraries). The Steering Committee has asked that the Forum Proceedings (and other documents) be posted to the Novanet DE Web site. The re-opening of the Queen's Printer at NSAC has reduced printing costs.

d) Areas of concern regarding deliverables: None

e) Next quarter's forecast deliverables:

I.   Complete draft Business Plan for Pilot Project based on recommendations of the Forum
        Method: use a standard template, adapted for the non-profit environment
        Contributors: Library staff, student, faculty, DE Admin representatives for the pilot advisory teams
        Time line: June - August 2002

II.   Recruit Assistant Project Manager and Library staff to participate in the pilot teams.
        Method / Strategy: Identify skills needed, benefits to be derived, prepare publicity (brochure)
        Formalize recruitment plan: criteria, ad, job description, interview questions, etc.
        Orientation for Assistant Project Manager.
        Contributors: Library staff at Novanet institutions, Steering Committee, Dalhousie Library School
        Time line: to have Assistant Project Manager in place by August 6, 2002

III.   Lease equipment & set up office and meeting space & arrange network and communications
        Method / Strategy: this may be partially in-kind contribution of the Nova Scotia Agricultural
        College, perhaps through research overheads.
        Contributors: Acting Chief Librarian and Systems Librarian (NSAC) as well as the NSAC
        Administration (VP Academic and VP Administration).
        Time Line: by September 2002

IV.   Begin planning the design and implementation of selected technologies.
        Contributors: pilot advisory teams
        Challenges: Maintaining the consortium focus. Establishing 'distance" work patterns for the pilot
        teams. Staying focused on issues arising from the needs assessment. Staying within a modest
        budget. Planning for sustainability.
        Time line: September - December 2002

Novanet Working Group on
Distance Education

OLT ACTION PLAN 2002 Objectives and Time Table - Updated March 2002

Activities / Objective	Method / Strategy	Contributors	Time line	Comments
I. Literature Review	Online databases; final bibliography selected by the Steering Committee		Completed by January 31, 2002 with continuous updating	
II. Three Surveys	<u>Student Survey</u> (demographics and needs assessment) to be mailed <u>Faculty Survey</u> (Faculty, Instructors, Coordinators of distance/ continuing ed) <u>Library Survey</u> (participating Novanet libraries - existing and planned services and policies) by interview using survey previously mailed		March 2002	surveys distributed but returns still coming in throughout February data entry more time - consuming than expected
III. Develop a tentative Service Model in the form of a Discussion Paper	based on responses to the surveys	input from the DE Working Group and DE Liaisons at libraries at 8 universities and the community college	April-May 2002	data entry for library survey continues. Discussion paper to integrate findings of all three surveys (5 surveys if you count the comments as separate)
IV. Stake Holders Forum	by invitation small conference / workshop format	representatives of DE students, DE faculty / instructors / coordinators of programs and library staff	May 2002	more realistic for careful planning for 50 participants
V. Business Plan for Pilot Project	based on outcomes of the forum.	Recruit student and faculty representatives for the Steering Committee (DE Working Group)	June-July 2002	prepare proceedings or summary document; consultations in development of the business plan; it is required before (Aug.5, 2002)
VI. Select suite of innovative information and learning technologies for testing	Committee to attend one technology conference; update literature review	Steering Committee	June-July 2002	must research specs and possibly prepare tender documents or RFPs for a number of products

VII. Recruit: Assistant Project Manager and library staff	Identify skills needed - benefits to be derived - publicity on project goals, objectives examples of complementary skills: teaching, reference, distance ed., info. technology, communications, Web Page design, educ.program design, etc. examine governance issues	contact all library staff of Novanet institutions Steering Committee contact Dalhousie School of Library and Information Management and professional contacts.	June-July 2002	will need lead time to prepare recruitment papers for proper personnel management lobbying and publicity for the project among library staff
VIII. Lease equipment & set up office and meeting space		NSAC systems librarian; NSAC administration; Project manager IT support	August 2002 -	Upgrade environment for Asst Project Manager & test teams (subcommittees)
IX. Test and implement selected information technologies for electronic collections	identify discipline specific collections for several programs shared by Novanet institutions - model: MDConsult	One working group or team; advisors include DE faculty, students, admin. Ex-officio: one steering committee member and Asst Project Manager	Plan implementation Fall 2002 -	pilot starts January 2003
X. Test and implement online reference support services, and begin developing user profiles	interactive reference chat service database development security issues	same as above	Plan implementation Fall 2002 -	pilot starts January 2003
XI. Test and implement information literacy program	Web site development Novanet tutorial Viewlets for web page instruction	same as above	Plan implementation Fall 2002 -	pilot starts January 2003
XII. Test and evaluate electronic reserves	Compare print, electronic, CD	same as above		
XIII. Run the Pilot Project for one year	Four working groups		January - December 2003	pilot starts January, ends December 2003
XIV. Evaluation of Project		Methodologies established the first year Statistics Journal Keeping by participants	January 2004	pilot ends December 2003

1.2 Budget

a) Forecast quarterly expenditures:

Direct salaries and benefits:	$ 1,654.00
Consultants fees:	$ 5,000.00
Direct materials & supplies:	$ 100.00
Printing & dissemination:	$ 500.00
Evaluation:	$
Other: digital collection	$

b) Actual quarterly expenditures:

Direct salaries and benefits	$ 1,516.55
Consultants fees:	$ 3,725.59
Direct materials & supplies	$ 59.27
Printing & dissemination	$ 363.48
Evaluation:	$
Other:	$

c) Variations in expenditures:

Direct salaries and benefits	$ 137.45
Consultants fees:	$ 1,274.41
Direct materials & supplies	$ 40.73
Printing & dissemination	$ 136.52
Evaluation:	$
Other: digital collection	$

d) Budgetary concerns: None

e) Next quarter's forecast expenditures:

Direct salaries and benefits:	$ 3,520
Consultants fees:	$
Direct materials & supplies:	$ 500
Printing & dissemination:	$ 250
Evaluation:	$
Other: Digital Collection	$17,500

1.01 OVERVIEW

1.1 Changes Affecting the Project: None.

1.2 Dissemination and Promotion Plan:

  The Project Manager presented a paper describing the project and a detailed overview of the results of the needs assessments (surveys of students and faculty); Pam MacLean presented a paper suggesting a service philosophy for service to distance education students; Gwyn Pace provided an information update on document delivery developments - to the Distance Education Stakeholders' Forum on Monday, May 27, 2002 (attendance: forty people from eight post-secondary institutions in N.S.). At the Canadian Library Association Annual Conference in Halifax on Friday, June 21st, the Project Manager presented a paper describing the project and our progress to date (attendance: 80 people from across Canada from public, university and college libraries).

  The Library Survey Summary will be submitted to the Canadian Association of College and University Libraries as an addendum to Occasional Paper No. 14 - *Third Off Campus Library Services Survey - 1999.* The Occasional Papers are published in print and also in pdf format on the Canadian Library Association web site.

  The Discussion Paper was distributed to all participants in their registration kit, as well as to the Novanet Policy Board. Stakeholders Forum Proceedings are being published for deposit in the Nova Scotia Legislative Library and the National Library of Canada and distribution to the Novanet Policy Board, Steering Committee, and to Forum participants in both print and electronic format. Two copies will be catalogued for the Novanet online library catalogue, which is accessible by anyone with access to the Internet and the World Wide Web. These documents and others will be posted to the Novanet Web site DE pages. A brochure will be prepared to be used in recruitment of staff and pilot teams.

3.0 PROJECT DESCRIPTION [unchanged]

  This project will develop a new service model in the context of the most recent and innovative developments in information technology, with participation of students, faculty, and those library staff who work with a distance/ continuing education clientele. This model will be such that individual differences (skill level, disability, stage of life, experience, work scheduling), geographic location, and level of access to technology are evaluated and accommodated in a customized support program, by library specialists dispersed throughout the consortium, working as a team.

  This project will develop and support library specializations in a collaborative program among member libraries of the Novanet consortium. The team will be instrumental in developing an online information literacy program and maintaining a distance education Web gateway for Novanet. It will provide employment opportunities through an internship program. The model will be implemented as a pilot project over a two year period and its effectiveness assessed by the client group (adult learners and faculty) and by librarians.

  This project will identify and assess new information and learning technologies, testing their suitability and effectiveness for the library setting in the provision of online reference, user instruction and other information support services.

4.0 AUTHOR

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