OFFICE OF LEARNING TECHNOLOGIES

PROJECT: Project #21021 Remote Distance/ Continuing Education – Information Support
QUARTER: Q2 (July 1, 2002 – September 30, 2002)

1.01   PROJECT STATUS
1.1   Deliverables:
   a) Forecast Quarterly Deliverables:
   I.   Complete Draft Business Plan for Pilot Project
   II.   Select Suite of Information / Learning Technologies for Testing
   III.   Recruit Assistant Project Manager and Library Staff for Pilot Teams
   IV.   Lease Equipment & Set up office for Assistant Project Manager
   V.   Begin Planning the Design and Implementation of Selected Technologies

   b) Actual Quarterly Deliverables:

I.   Business Plan for Pilot Project
Method / Strategy: use a standard template, adapted for the non-profit environment
Contributors: Library staff, student, students, faculty, DE Admin reps for the pilot advisory teams.
Time line: June – August 2002

Preparation of the Business Plan began in late June 2002. The Business Plan was approved by the Novanet Distance Education Working Group (the Project Steering Committee) at their meeting of September 27, 2002. In an academic environment a business plan is not normally prepared, so that the benefits of this effort were not entirely clear; however, the various analyses proved very useful in moving the project forward. These included:

1) Business Description:

The advantages of completing this analysis was to clarify three characteristics that will help us succeed. The analysis was extended to include the main characteristics of each of the proposed pilot projects.

2) Budget for Technical Resources: Software, E-Resources, Training.

The advantage of completing this analysis was to show how the "rubber hit the pavement" or what the proposals coming out of the Stakeholders Forum meant in terms of financing the resources to allow them to happen. We were able to negotiate several beneficial arrangements, particularly with respect to the EBSCO trial for distance education students at institutions which do not subscribe to this product. The rationale was that all participating institutions in Novanet would have access to either PROQUEST or EBSCO Academic Search Elite to facilitate the Live Chat Reference service. Secondly, with respect to the OCLC NetLibrary E-Book Collections. Normally, OCLC does not allow the purchase of less than 400 titles which would cost approx. $60,000 Canadian. For our pilot they are allowing a much more focused selection of titles for specific distance education programs within Novanet institutions. They are considering themselves partners in our project and will assist in the evaluation.

3) Analysis of Technical Issues To Be Addressed by the Pilot Teams:

The advantage of completing this analysis was to record the particular challenges that have come to light so far. Since the Business Plan is intended as a sort of workbook for the pilot teams, these issues will become part of their working plans.

4) Human Resource issues.

The advantage of this analysis was to get a handle on the amount of time that will likely be required by libraries with staff interested in participating in the trials. The library directors will have a better basis on which to decided which staff and how many are allowed to represent their libraries.

II.   Select Suite of Information / Learning Technologies for Testing
Method / Strategy: research suggestions arising from the Stakeholder Forum.
Contributors: Stakeholder Forum consultants.
Time Line: by September 2002

At the Steering Committee meeting of the Novanet Working Group on September 27, 2002, the Project Manager was advised and authorized to proceed with the purchase of these resources. The rationale was that the Assistant Project Manager, when hired, will have his or her hands full coordinating and supporting the work of the pilot teams without having to research and rationalize the content of the pilot projects. It was felt that the Forum consultations had been definite and clear enough for us to proceed. We will be about one month behind schedule on this aspect of the project, mainly because it proved to be impossible to make any progress during the summer vacation period.

III.   Recruit Assistant Project Manager and Library Staff for Pilot Teams
Method / Strategy: identify skills needed, benefits to be derived, prepare brochure
Formalize recruitment plan: evaluation criteria, ad, job description, interview questions etc.
Orientation for Assistant Project Manager
Contributors: Library staff, Steering Committee, Dalhousie Library School
Time line: to have Assistant Project Manager in place by August 6, 2002.

The recruitment of an Assistant Project Manager is slightly behind schedule.   The job opportunity was posted on Monday – Tuesday September 23-24, 2002 to the Dalhousie University Graduate School of Library and Information Services as well as to the Novanet listserv.   We are receiving applications until October 7, 2002 and hope to schedule interviews later that week. Since this contract position will be on the Novanet payroll at 50% matching funding, it was felt that the hiring documents should be approved by the Novanet Executive Committee (NEC). NEC did not meet during July or August, but approved the hiring documents and process at their meeting on September 5, 2002

IV.   Lease equipment & set up office and meeting space
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); NSAC Admin.
Time Line: by September 2002

Arrangements have been finalized for office space and equipment in the MacRae Library, NSAC.

V.   Begin planning the design and implementation of selected technologies.
Method / Strategies: recruit experienced and novice participants to pilot teams.
Challenges: Maintaining a 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.

An initial invitation to participate went out to all those who had participated in the Stakeholders Forum. There was a good response, particularly for the Live Chat Reference. For other of the pilot projects we will have to recruit more actively. The Novanet Working Group has advised that a brochure should be prepared to help in this effort. The Novanet Executive Committee advised that the Novanet Policy Board (University Library Directors) be asked to actively encourage their staff to participate. It was decided to allow the Assistant Project Manager posting to run its course before recruiting to the pilot teams.

c) Variations from last quarter's stated objectives:

The variation from last quarter's stated objectives is a delay of approximately one month – equivalent to the unexpected loss of momentum during the August holidays. No objectives have been changed or abandoned.   Several additional objectives were achieved.

In late June we received an invitation from the International Centre at the Nova Scotia Agricultural College to participate in three days of seminars on Distance Education organized for the benefit of a group of educators from the College of Agriculture, Science and Education (CASE) in Port Antonio, Jamaica. We participated as resource people and also received the benefit of presentations by faculty at Dalhousie University, Saint Francis Xavier University and Mount Saint Vincent University who outlined their experiences managing distance education programs.

Two Working Group members, Gwyn Pace and Marnie MacGillivray did some intensive work updating the Bibliography. It is tentatively entitled, Library Consortia Approaches to Distance Education – a Bibliography and now consists of several hundred items. We are presently making arrangements to procure copies of the items identified, so that the collection can be a resource for the pilot teams.

d) Areas of Concern Regarding Deliverables: None
e) Next Quarter's Forecast Deliverables:

I.   Complete the hiring and orientation of Assistant Project Manager
        Method: continue the recruitment process outlined in the hiring documents.
        Contributors: Novanet DE Working Group; Project Manager; Administrative Assistant
        Time Line: October – December and as needed.

II.   Finalize the Pilot Teams and list of participants.
        Method: develop an active recruitment strategy; design a brochure; use the Novanet
        listserv and Distance Education Web site; perhaps a public meeting in Halifax.
        Contributors: Novanet Policy Board members; Novanet Executive Committee
        Time Line: before the end of November

III.   Continue planning design and implementation of trials for selected technologies
        Method: one meeting in person; the rest by conference call and e-mail exchanges
        Contributors: Assistant Project Manager and Administrative Assistant
        Time-Line: to be decided by the pilot teams. At the latest the full trials will be run
        September – December 2003.

IV.   Develop a more detailed time line for the pilot projects.
        Method: Follow the OLT format
        Contributors: Pilot teams and Assistant Project Manager and Administrative Assistant
        Time-Line: by January with revisions each quarter and as needed

V.   Complete the licensing of software and digital resources for the trials.
        Method: clarify a few remaining questions about the licenses and trial periods of
        different products.
        Contributors: Project Manager; Administrative Assistant; MacRae Library staff.
        Time Line: before the end of November or as needed to support the pilot projects.

Novanet Working Group on Distance Education

OLT ACTION PLAN 2002 Objective and Time Table – Updated September 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	Committee to attend one technology conference; update literature	Steering Committee	June-July 2002	must research specs and possibly prepare tender documents or RFPs for a number of

for testing	review			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		Steering Committee Subcommittees as needed	August 2002 -	Upgrade environment for Asst Project Manager & test teams (subcommittees)
IX. Test and implement selected information technologies	Web site development and technologies related to communication of digital information	Steering Committee Pilot Project Manager Consultants	Plan implementation Fall 2002 -	pilot starts January 2003
X. Test and implement online reference support services, and begin developing user profiles	One working group or team toll free phone line interactive reference chat service database development security issues	Pilot Project Manager Consultants Participating library staff DE students and faculty	Plan implementation Fall 2002 -	pilot starts January 2003
XI. Test and implement information literacy program	One working group or team		Plan implementation Fall 2002 -	pilot starts January 2003
XII. Run the Pilot Project for one year	Three working groups		January - December 2003	pilot starts January 2003
XIII. Evaluation of Project	Methodologies established the first year Statistics Journal Keeping by participants		January 2004	pilot starts January 2003

1.2 Budget

a) Forecast quarterly expenditures:

Direct salaries and benefits:	$3520
Consultants' fees:	$0
Direct materials & supplies:	$500
Printing & dissemination:	$250
Evaluation:	$0
Other:	$17500

b) Actual quarterly expenditures:

Direct salaries and benefits:	$1407.20
Consultants' fees:	$0
Direct materials & supplies:	$24.78
Printing & dissemination:	$0
Evaluation:	$0
Other:	$0

c) Variations in expenditures:

Direct salaries and benefits:	$2112.80
Consultants' fees:	$0
Direct materials & supplies:	$475.22
Printing & dissemination:	$250
Evaluation:	$0
Other:	$17500

d) Budgetary concerns: None

e) Next quarter's forecast expenditures:

Direct salaries and benefits:	$5960
Consultants' fees:	$2500
Direct materials & supplies:	$0
Printing & dissemination:	$0
Evaluation:	$0
Other:	$17500

1.02 OVERVIEW

1.1 Changes Affecting the Project: None that I am aware of. We lost a little momentum during the summer months. The Special Project Leave of the Project Manager required her participation in the fall library orientation of the MacRae Library. This has been more demanding and time-consuming than expected.

1.2 Dissemination and Promotion Plan:

The Novanet Web Site was completely reorganized and brought up to date including all published documents of the project to date, including the minutes of meetings, needs assessments, planning documents, progress reports, and most recently the job posting and position description. It is not particularly attractive but everything is there. We are recommending a complete redesign of the Novanet Web Site, which would include the Distance Education pages which we hope to use for library staff throughout the consortium who might be interested in our work, as well as, eventually, Distance Education students being included in the trials.

Now that the Business Plan has been approved, we will be publishing it in quantities sufficient to support the work of the teams and for the information of the Novanet Executive and Policy Board. It is available on the web site as well in a draft form which needs some minor revisions.

Recruitment for the pilot teams will give us the opportunity to publicize the project to a wider community. We have received several enquiries from the United States for copies of the Discussion Paper and the Forum Proceedings, which are being included in a bibliography on library services to distance education.

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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