OFFICE OF LEARNING TECHNOLOGIES

PROJECT: Project #21021 Remote Distance/ Continuing Education ʙ Information Support
QUARTER: Q3   (October 1, 2002 ʙ December 31, 2002)

1.01 PROJECT STATUS

1.1   Deliverables:

a) Forecast Quarterly Deliverables:
      I.   Complete Hiring and Orientation of Assistant Project Manager
      II.   Finalize Pilot Teams and List of Participants
      III.   Continue Planning Design & Implementation of Trials
      IV.   Develop More Detailed Time Line for the Pilot Projects
      V.   Complete Licensing of Software & Digital Resources for Trials

b) Actual Quarterly Deliverables:

I.   Complete 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 ʙ December and as needed.

Permission was received from the Novanet Executive Committee (NEC) [meeting #61 item 3.2] to proceed with the hiring of an Assistant Project Manager following NSAC HR procedures and documentation. The position was posted for two weeks on the Dalhousie University School of Library and Information Studies web site, linked also to the Atlantic Provinces Library Association web site. A notice with conditions of employment was sent via the Novanet listserv to all staff of Novanet libraries and as a permanent record was posted on the Novanet - Distance Education web page. The interviews were held on October 17 at Mount Saint Vincent University in Halifax. The interviewers were M. MacGillivray (Mount Saint Vincent University), C. Harrigan (Saint Mary's University), and B. Waddell (Nova Scotia Agricultural College). Four suitable candidates were identified for the competition from among those who applied. Based on the applications, interviews, and references we were pleased to offer the position to Ms. Todie Winter, who graduated from the University of Western Ontario, Faculty of Information and Media Studies with a Masters degree in August 2002.

T. Winter began work on November 12, 2002. An office was set up with network connections and appropriate phone, e-mail and network accounts. The orientation consisted of a tour (facility and collections) of the MacRae Library, an hour long session with each functional unit of the Library, a detailed discussion of the project history, review of the project archive. An orientation to the accounting system was provided by Laurie Brenton (former administrative assistant for the project), a meeting was held with Cynthia Martin-Magdy, the accountant for Novanet, and both support and technical staff of Novanet were introduced. An

in-person meeting was held with the DE Working Group on November 28, 2002 at Truro.

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 and Executive Committee, DE Working Group
Time Line: before the end of November.

The Novanet Policy Board (University Library Directors) approved the Business Plan for the pilot phase of the project [meeting #5 item 02-51] on November 8, 2002. This included a description of four pilot projects: #1 Live Chat Reference, #2 Discipline Specific E-Book Collections, #3 Point of Need Online Turorial, #4 Electronic Reserves. The recruitment strategy for the pilot teams was approved with an invitation to participate to be distributed via the Novanet listserv. The directors asked that those interested apply through the directors and agreed to actively encourage participation. A notice entitled: 'Novanet Research Opportunity' was posted on Monday, November 18. The list was finalized over the next month. A copy of this committee list is included in this report as Attachment #1.

III.   Continue Planning Design & Implementation of Trials
Method: one meeting in person; the rest by conference call and e-mail exchanges
Contributors: Project Manager, Asst. Project Manager, DE Working Group, Pilot Teams
Time-Line: to be decided by the pilot teams. At the latest the full trials will be run September ʙ December 2003.

Preliminary work plans for each of four pilot projects: #1 Live Chat Reference, #2 Discipline Specific E-Book Collections, #3 Online Tutorial, #4 Electronic Reserves was prepared for the November 28 meeting of the DE Working Group. These will be placed on the agenda of the first meeting of each pilot team in January. A copy is included in this report as Attachment #2. The DE Working Group requested that B. Waddell attend the first meeting of each pilot project to provide history and background information. T. Winter will be the Secretary of each pilot group and one member of the DE Working Group will be a member of each of the pilot projects. Each pilot team will elect one person to be the chairperson. It is expected that T. Winter will be both a technical and administrative resource for the team which will act as a steering committee for planning, conducting, and reporting on the trial.

IV.   Develop More Detailed Time Line for the Pilot Projects.
Method: Follow the OLT format
Contributors: Pilot teams and Assistant Project Manager
Time-Line: by January with revisions each quarter and as needed

The only real requirement is that the Trials be completed before the end of December 2003. Because we are working within academic terms, some of the

pilot project trials must be scheduled between January - April or September – December 2003. Others may be more feasible during the summer months. The length of the trial as well as the number of hours required to provide the needed data will be a decision of the Pilot Teams. The form and content of the evaluation likewise will be their decision. It must be remembered that participation in these Pilots is in addition to the regular workloads of most participants. It is hoped that extra people might be recruited for the actual trial itself and that the Assistant Project Manager will do the coordinating.

V.   Complete Licensing of Software & Digital Resources for Trials
Method: clarify remaining questions about the licenses and trial periods of different products.
Contributors: Project Manager; Assistant Project Manager
Time Line: before the end of November or as needed to support the pilot projects.

An outline of the technical resources required for the pilot projects was included in the Business Plan approved by the DE Working Group on September 27 and the Novanet Policy Board on November 8, 2002. A copy is included in this report as Attachment #3. License agreements were clarified and signed in December 2002. The major commitment was to OCLC's NetLibrary for the purchase of $20,000 CAD worth of E-books (titles to be selected by the appropriate pilot group in consultation with the user community, particularly faculty). The normal requirement of a minimum purchase of 400 titles has been waived on the merits of our proposal that the collections be discipline-specific. NetLibrary staff authorized a smaller collection after receiving copies of our proposal, discussion paper, and forum proceedings. Average cost per title is estimated at $100 CAD.   Other resources are being arranged within publisher's guidelines for "free trials". Software licenses have been signed for the calendar year 2003. The Live Chat software has not been finalized. A newer product is being offered without charge to our project. It appears to have all the features we would be interested in, including many that have in the past only been included in more expensive products. The pilot team will evaluate the products available to us and select the one most appropriate to the trial.

c) Variations from last quarter=s stated objectives: none

Some changes have been made in personnel. M. MacGillivray of Mount Saint Vincent University (MSVU) accepted a position in Calgary. In her place, James Watson, who has contributed to the project as a liaison for the University College of Cape Breton (UCCB), was voted onto the DE Working Group. Mr. Terrence Paris, Library Director, offered to be the liaison for Mount Saint Vincent University. Laurie Brenton, Administrative Assistant between January and September 2002, resigned the Project's contract position to accept a permanent position. In the exit interview, Laurie suggested that a half-time administrative assistant was not required since the ledger and accounting system were now set up and procedures formalized. She felt one-two days per week would be adequate. The Assistant Project Manager has agreed to assume accounting responsibilities with the understanding that additional contract assistance for the bookkeeping function will be arranged, if needed, after the pilot teams begin their work

In our original action plan we forecast three pilot projects. Based on the student and faculty response to the survey and the discussion at the forum, we have four pilot projects. The

area of electronic reserves was strongly requested by distance education students; however, implementing such a service appears to be very costly and labour intensive due to copyright requirements. The pilot team will examine alternate ways of meeting this need.

A technical report was submitted to the Novanet Policy Board and the Novanet System Operations Committee (NSOC) outlining improvements that could be made in policies and procedures to improve services to the distance education / remote / continuing education clientele of Novanet. These recommendations were suggested by the needs assessment. We have not yet received feedback from NSOC. A copy is included in this report as Attachment #4.

A brochure describing the four pilot projects was developed by the Assistant Project Manager as a recruitment tool. A copy is included in this report as Attachment #5.

d) Areas of Concern Regarding Deliverables: None

e) Next Quarter=s Forecast Deliverables:

I.   Continue Planning Design & Implementation of Trials of Selected Technologies
Method: Each Pilot Team to meet at least once in January and thereafter as needed.
Contributors: Assistant Project Manager; Pilot Teams; Consultants as required.
Time Line: January- March and as needed.

II.   Develop Action Plan and Schedule of Activities (including the date of the Trials if appropriate).
Method: Each Pilot Team to meet at least once in January and thereafter as needed.
Contributors: Assistant Project Manager; Pilot Teams; Consultants as required.
Time Line: January- March and as needed.

III.   Design or Decide on the method of evaluation for each pilot
Method: Each Pilot Team to meet at least once in January and thereafter as needed.
Contributors: Assistant Project Manager; Pilot Teams; Consultants as required.
Time Line: January- March and as needed.

IV.   Verify that Digital Resources and Licenses are Adequate for the Trial or Evaluation
Method: Be resourceful and creative in developing training for software and digital resources, (e.g. self-train, in pairs, work sessions, site visits, FAQ's, train the trainer etc.) Each Pilot Team to meet once in January and thereafter as needed.
Contributors: Assistant Project Manager; Pilot Teams
Time Line: January- December 2003.

V.   Maintain Records of all Technical, Administrative and Policy Issues Discussed (both positive   and negative)
Method: Archive detailed minutes of meetings; discussions; working papers; logs; samples, etc.
Contributors: Assistant Project Manager and Pilot Teams.
Time Line: January- December 2003.

OLT ACTION PLAN: Objective and Time Table- Updated December 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	Student Survey (demographics and needs assessment) to be mailed Faculty Survey (Faculty, Instructors, Coordinators of distance/ continuing ed) Library Survey (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 Lease digital resources		Steering Committee Subcommittees as needed	August 2002 -	Upgrade environment for Asst Project Manager & test teams (subcommittees)
IX. Test and implement Pilot #1: Live Help/ Chat Reference Assistance	One working group or team	Assistant Project Manager Participating library staff, DE students and faculty (Pilot Team) Consultants as needed	Plan implementation Jan-Dec 2003	pilot starts January 2003
X. Test and implement Pilot #2: Discipline-Specific Electronic Collections	One working group or team	Assistant Project Manager Participating library staff, DE students and faculty (Pilot Team) Consultants as needed	Plan implementation Jan-Dec 2003	pilot starts January 2003
XI. Test and implement Pilot #3: Online Tutorials	One working group or team	Assistant Project Manager Participating library staff, DE students and faculty (Pilot Team) Consultants as needed	Plan implementation Fall Jan-Dec 2003-	pilot starts January 2003
XII. Evaluate Pilot #4 Electronic Reserves	One working group or team	Assistant Project Manager Participating library staff, DE students and faculty (Pilot Team) Consultants as needed	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:	$ 5,960
Consultants= fees:	$ 2,500
Direct materials & supplies:	$
Printing & dissemination:	$
Evaluation:	$
Other:	$ 17,500

b) Actual quarterly expenditures:

Direct salaries and benefits:	$ 2,899.77
Consultants= fees:	$
Direct materials & supplies:	$ 108.03
Printing & dissemination:	$ 8.11
Evaluation:	$
Other:	$ 11,630.00

c) Variations in expenditures:

Direct salaries and benefits:	$ 3,060
Consultants= fees:	$ 2.500
Direct materials & supplies:	$ 109
Printing & dissemination:	$ 8
Evaluation:	$
Other:	$ 5,870

d) Budgetary concerns: None

e) Next quarter=s forecast expenditures:

Direct salaries and benefits:	$ 5,960
Consultants= fees:	$ 2,500
Direct materials & supplies:	$ 1,250
Printing & dissemination:	$
Evaluation:	$ 3,000
Other:	$ 20,333

1.02 OVERVIEW

1.1 Changes Affecting the Project: None that I am aware of.

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, the job posting and position description for the Assistant Project Manager, the notice of invitation to participate in the DE Pilot Projects and most recently the participant lists for the pilot projects. The site 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. We hope to use the Novanet Distance Education Web Site for library staff throughout the consortium who might be interested in our work, and eventually, for Distance Education students being included in the trials. A separate page has been established for each of the trials for participant lists, minutes of meetings, reports etc.

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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