OFFICE OF LEARNING TECHNOLOGIES

PROJECT: Project #21021 Remote Distance/ Continuing Education Β Information Support
QUARTER: Q4 fiscal year 2002-2003 (January 1, 2003 - March 31, 2003)

1.01 PROJECT STATUS

1.1 Deliverables:

a) Forecast Quarterly Deliverables:

I.   Continue Planning Design & Implementation of Trials of Selected Technologies
II.   Develop Action Plan and Schedule of Activities (including the date of the Trials if appropriate).
III.   Design or Decide on the method of evaluation for each pilot
IV.   Verify that Digital Resources and Licenses are Adequate for the Trial or Evaluation
V.   Maintain Records of all Technical, Administrative and Policy Issues Discussed (both positive and negative)

b) Actual Quarterly 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.

The first meeting of each Pilot Team was scheduled in January and all had succeeded in meeting to develop a work plan and schedule by the end of February. At the request of the Novanet Distance Education Working Group, B. Waddell attended the first meeting of each Pilot Team, specifically to discuss the background information and vision statement of the project. At this time, the discussion paper, forum proceedings, business plan, and the Technical Report entitled "Making Novanet More User Friendly for Distance Education" was distributed to anyone who was not familiar with them. Two pilot teams requested a continued presence by the Project Manager (E-Collections and Chat-Reference). The understanding is that the Project Manager is an ex-officio member of the Pilot Teams but will normally attend meetings when invited. The first order of business was to elect a Chairperson for the Pilot Team. The second order of business was to develop an action plan and schedule of activities.

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.

This task was easier than expected because of the many years of experience brought to the group by members of the Pilot Teams. The trial or formal evaluation period for all Pilot Projects was scheduled for September – October/ November 2003, with the

exception of the Chat Reference which will be offered a limited number of hours during the summer for selected summer research courses as practice for the information providers. The formal evaluations will include a quantitative evaluation that monitors user behaviour and preferences and qualitative evaluation that asks about feelings and opinions. Data will be tabulated and analyzed in December with a final report prepared for January 2004 as part of the final report for the project. The Pilot Teams met at least once "in person". Some will continue to meet in-person, but conference calls (audio-conferencing) will also be used. A copy of the Tentative Action Plan and Schedule of Activities (including the proposed dates of the Trials) is included in this report as Attachment #1.

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.

This is proving to be the most difficult aspect of the pilot planning, as would be expected, and each pilot is developing its own approach. In some instances the software product being used incorporates statistical reports and transcripts that are sufficient for the trial. In other cases, the cooperation of Novanet and the Novanet System Operations Committee is being sought. Most want to have feedback that is both quantitative and qualitative. The qualitative feedback is expected to be gathered through interviews or Web survey forms distributed with the cooperation of participating faculty. A number of people on the Pilot Teams have had experience with developing online surveys using Zoomerang or Ask A Question (open source software).

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, Webinars (Web Seminars), in pairs, workshops, practice sessions, site visits, FAQs, 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 – March and as needed.

Additional licenses for the Viewlet Builder were purchased because the Pilot Team itself is larger than anticipated. The NetLibrary e-book collection is being expanded so that the initial allocation reflects the relative number of courses offered via distance education in Nursing, Education, Business i.e. 50:50:100. We would also like to have approximately 50 titles (approximately $5,000 or roughly 10:10:20) which could be assigned as the need arises to give us the flexibility to satisfy the requirements of participating faculty. An evaluation was completed for the Chat Reference software comparing LivePerson (mentioned most frequently in the literature) and LiveTeam (a newer product being offered to our project free of charge). The products are very comparable and the support for the latter appears to be better. A copy of this evaluation is included in this report as Attachment #2. Finally, it will be necessary to lease a scanner for the e-reserves evaluation.

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, technical evaluations and reports; specifications, etc.
Contributors: Assistant Project Manager and Pilot Teams.
Time Line: January – December 2003

Formal minutes of meetings are being kept for each pilot team. These are archived in print form and also, when approved, posted to the Novanet Distance Education Web site, which is updated at least quarterly with the assistance of D. Boudreau from the Novanet Technical Staff. Examples of supplementary reports produced to date include: Work Plan for each of the Pilot Teams (included as attachment #1); Comparison Criteria for the Selection of Chat Reference software (included as attachment #2), Technical Report on Scanning for E-Reserves (Acadia visit) (included as attachment #3); Training Documents and handouts for the Viewlet Builder demonstration and workshop (O-Tutorials)(attachment #4); Table of DE Courses and preliminary Profile of Programs in Nursing, Business, Education that will provide the basis for E-Collection development (included as attachment #5). The Assistant Project Manager prepared these reports in consultation with the Pilot Teams.

c) **Variations from last quarter's stated objectives:** None. Many of the Pilot Team meetings originally scheduled for January had to be postponed to February because unusually inclement weather often made driving extremely dangerous.

d) **Areas of Concern Regarding Deliverables:** None

e) Next Quarter's Forecast Deliverables:

I. **Prepare Hiring Documents for Summer Internships (o-tutorials, e-reserves, chat-reference)**
    Method: Coordinate with Dalhousie University Killam Library and the Dalhousie School of Library and Information Science (Dal SLIS) Term: May-August 2003
    Contributors: O-Tutorial, E-Reserves, Chat Reference Pilot teams; F. Novakowski (DAL); DAL SLIS; Assistant Project Manager
    Time-Line: April for June start date or March for May start date.

II. **Clarify Technical & Policy Issues Related to Implementing These Technologies in Trials**
    Method: Request approvals from appropriate committees (Novanet committees and individual universities)
    Contributors: Lennard Tan (Novanet Director of Information Systems); NSOC; Novanet Executive Committee; Project Manager
    Time-Line: April – August

III. **Identify and Organize Content (O-Tutorials/Instruction, Chat Reference/Training, E-Collections/E-content, E-Reserves/copyright clearance or license)**
    Method: sharing of pre-existing print instructional materials, consultations with faculty and staff; hard study
    Contributors: Each Pilot Team; Assistant Project Manager
    Time-Line: April – June (e-reserves will continue through September)

IV. **Prepare Marketing/ Orientation Materials for DE students & Finalize DE Student Web Pages**
    Method: Brochures for distribution with DE course packs; Novanet DE Student Web Pages, Notices to Faculty & Student Distance Education Listservs.
    Course packs are normally distributed July – August
    Contributors: Each Pilot Team; Novanet Technical Staff; Assistant Project Manager; DE Coordinators at each University; DE Faculty & Instructors
    Time-Line: Mid-May- July.

V. **Maintain Records of All Technical, Administrative and Policy Issues Discussed**
    Method: Archive detailed minutes of meetings; discussions; working papers; logs; samples, technical reports, specifications, etc.
    Contributors: Assistant Project Manager and Pilot Teams
    Time Line: January – December 2003

Novanet Working Group on Distance Education & Pilot Teams

OLT ACTION PLAN 2002-2004

Objectives and Time Table – Updated March 2003

Activities / Objectives	Method/ Strategy	Contributors	Time Line	Comments
I. Literature Review	Online databases; final bibliography selected by WG	Working Group	Completed by January 31, 2002 with continuous updating	
II. Three Surveys	**Student Survey:** demographics, needs assessment (to be mailed) **Faculty Survey:** Faculty, instructors, DE Coordinators **Library Survey:** participating Novanet libraries; existing & planned services & policies; by interview using survey previously mailed		January – March 2003	Surveys distributed but returns still coming in throughout February; Data entry more time-consuming than expected.
III. Develop tentative service model in form of 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. Based on responses to surveys	Representatives of DE students, faculty, instructors, coordinators of programs and library staff	May 2002	Date of Forum changed to allow more careful planning for 50 participants
V. Business Plan	Business Plan for the Pilot Projects, based on outcomes of the Forum	Recruit student and faculty representatives for the Pilot Project	June – July 2002	Prepare proceedings or summary document; consultations in preparation of business plan; required by August 2002

VI. Select Suite of Innovative Information and Learning Technologies for testing	Working Group to attend one technology conference; Update literature review	Working Group	June – July 2002	Must research specs and possibly prepare tender documents for RFP for a number of products
VII. Recruit Assistant Project Manager for Pilot	Identify skills needed – benefits to be derived & publicity on project goals, objectives; examples of complementary skills: teaching, reference, DE, info technology, communications, Web page design, educ program design, etc.	Contact all library staff of Novanet institutions Working Group Dalhousie School of Library and Information Studies and professional contacts	November 2002 – January 2003	Will need lead time to prepare recruitment papers for proper personnel management Lobbying and publicity for the project among library staff throughout Novanet
VIII. Lease Equipment & set up office and meeting space	Find and/or establish standards; compare prices and availability	Consultant Project Manager Systems Librarian NSAC	November 2002 – November 2003	Upgrade environment for Asst Project Manager and Pilot Teams
IX. Implement E-Reserves	Requires technical accommodation by Novanet; includes scanning evaluation for comparison; combination of scanned & licensed e-material w/ links on e-reserve	Pilot Team Novanet Director of Information Systems NSOC Committees Participating library staff Consultations with Faculty	March 2003 – November 2003	Trial to be scheduled between September 2003 and November 2003
X. Implement Chat Reference DE Information Support Service	Training & practice for service providers; Market to DE students and faculty as trial for fall term	Pilot Team Assistant Project Manager Consultants Participating Library staff DE students and faculty	Summer to practice with limited hours Provide trial service	Trial to be scheduled between September 2003 and November 2003
XI. Implement Point-of-Need O-Tutorials	Using viewlet builder software; Access from Novanet opac	Pilot Team Assistant Project Manager Novanet Director	Develop viewlet o-tutorial content April – May; Programming	Trial to be scheduled between September 2003 and November

	(geopac & telnet) also from DE web site (backup) (Requires 2 system upgrades by September to accomplish)	of Information Systems Programming by consultant	during summer; implement & test September – November 2003	2003
XII. Implement Discipline Specific E-Collections	Develop multi – institutional program profiles; work with designated faculty to develop customized collections; enter MARC records & links on catalogue and as a list on DE web page.	Pilot Team Assistant Project Manager DE faculty Subject Specialist librarians & staff Cataloguing staff Novanet technical staff	March – August 2003	Trial to be scheduled between September 2003 and November 2003
XIII. Evaluation of Project	Use methodologies customized by Pilot Team for each trial	Pilot Team Assistant Project Manager Project Manager Consultant	December 2003 – January 2004	Data evaluation & final progress report for OLT & the Novanet Policy Board
XIV. Wrap Up Session & Presentation of Results	Publicize successful completion of project and present results and recommendations;	Project Manager Assistant Project Manager Pilot Team Chairs Novanet Policy Board Others	January 2004 and thereafter as required	If time permits, prepare also an article for submission to a peer-reviewed library professional journal

1.2 Budget

a) Forecast quarterly expenditures:

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

b) Actual quarterly expenditures:

Direct salaries and benefits:	$ 4872
Consultants= fees:	$ 201
Direct materials & supplies:	$ 58
Printing & dissemination:	$ 17
Evaluation:	$
Other:	$ 9095

c) Variations in expenditures:

Direct salaries and benefits:	$ 1,088
Consultants= fees:	$ 2,299
Direct materials & supplies:	$ 1,192
Printing & dissemination:	$ 17
Evaluation:	$ 3,000
Other:	$ 11,238

d) Budgetary concerns: None

e) Next quarter=s forecast expenditures (Q1: 2003-2004):

Direct salaries and benefits:	$ 5,480
Consultants= fees:	$ 5,000
Direct materials & supplies:	$ 2,500
Printing & dissemination:	$
Evaluation:	$
Other:	$

1.02 OVERVIEW

1.1 Changes Affecting the Project: None.

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 as of March 2003, including the participant lists for the pilot projects, the brochure describing the pilot projects, the minutes of meetings for each pilot team, technical reports and evaluations. We are continuing to recommend a complete redesign of the Novanet Web Site, which would include the Distance Education pages for staff and also pages for DE students and faculty. We hope to use the Novanet Distance Education Web Site for library staff throughout the consortium who might be interested in our work and also as the resource page for services and support being offered to DE students during the trials in the Fall Term 2003.

The Project Manager participated in a Focus Group discussion on performance indicators organized by the Office of Learning Technologies on March 3, 2003 at the Halifax Corporate Research Centre on Dutch Village Road, Halifax. It was interesting to meet others who are managing projects under various programs of OLT. We all appreciated the opportunity to hear about other projects in the region and to share information about the very different approaches being taken to accomplish related objectives.

The Council of Atlantic University Libraries (CAUL) at their meeting February 7, 2003 expressed an interest in the project as complementary to the work that group is doing to develop an Atlantic Virtual Library (Atlantic Scholarly Information Network). There may arise opportunities for cooperation between the Novanet Consortium (10 Nova Scotia post-secondary libraries) and the CAUL group (representing 13 university libraries) with respect to the outcomes and recommendations of this project.

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 in teams.

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 tutorial 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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