

**Office of Learning Technologies  
Human Resources Development Canada  
Remote Distance/ Continuing Education  
Information Support Project  
Final Report- Part I  
Project #21021**

**Year 2: Pilot Project Summary**

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**Nova Scotia Agricultural College  
Truro, Nova Scotia  
January 2004**

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## **Pilot Project Background**

In January 2000, the Novanet Management Committee identified services to distance education users as an area requiring attention and established a Distance Education Working Group under the direction of Bonnie Waddell, Chief Librarian of the Nova Scotia Agricultural College. This group identified a number of initiatives required to gather information and prepare a plan for the improvement of information support for distance education users of Novanet libraries. The plan proposed:

- to survey distance users of Novanet - students
- to survey distance users of Novanet - faculty and instructors
- to survey distance services offered by Novanet libraries
- to complete a literature review of consortium based services for DE
- to prepare a discussion paper and recommendations for a new service model
- to have these evaluated by both users and library staff at a stakeholders forum
- to develop pilot projects to evaluate issues and alternatives
- to hire a social scientist to assist with pilot project evaluations
- to develop evaluation trials for each pilot project
- to make recommendations to the Novanet Policy Board for improved services.

A grant application was submitted to the Office of Learning Technologies (OLT), Human Resource Development Canada. This application was successful and resulted in 50% project funding of \$90,000 starting January 2002 and ending January 2004. The Windsor Foundation provided matching funding. NSAC approved a special project leave for the Chair for one year and continues to provide administrative support (office space, computing, phone lines, etc.)

It must be noted that Novanet had not committed to improving delivery of services through this initiative. The aim was to have the pilot projects evaluate new technologies and make recommendations to the Novanet Policy Board.

## **Executive Summary**

Assistant Project Manager Hired: Permission was received in September 2002 from the Novanet Executive Committee to proceed with the hiring of an Assistant Project Manager for the Pilot Phase of the Distance Education Project. Interviews were held October 17 at Mount Saint Vincent University. The successful candidate was Ms. Todie Winter, a recent graduate of the University of Western Ontario, Faculty of Information and Media Studies.

Business Plan Approved by Policy Board: The Novanet Policy Board approved the Business Plan for the pilot phase of the project 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 Tutorial, #4 Electronic Reserves. T. Winter began work on November 12, 2002 and was introduced to the Distance Education Working Group on November 28, 2002 in Truro.

Recruitment and Governance for Pilot Teams: The recruitment strategy for the pilot teams was approved with an invitation to participate to be distributed via the Novanet listserv. Those interested were asked to apply through the ten Directors, who agreed to

actively encourage participation. A notice entitled: “Novanet Research Opportunity” was posted on Monday, November 18. The membership list for each pilot was finalized over the next month, and included participants from seven Novanet Libraries (see Appendix A for table of pilot project membership). The DE Working group requested that the Project Manager attend the first meeting of each pilot team to provide a history and background information as well as a vision for the project. T. Winter would be the Secretary of each pilot group and one member of the Distance Education Working Group would be a member of each pilot project. Each pilot team would elect a chairperson. T. Winter would be both a technical and administrative resource for the team, which would act primarily as a steering committee for planning, evaluating, and reporting.

Work Plan and Schedule of Activities for four Pilot Teams: The first meeting of each Pilot team was scheduled in January 2003, and all had succeeded in meeting by the end of February to elect a chairperson, to develop a work plan and to develop a schedule of activities. All of the Teams chose September – November 2003 as the period for the formal evaluation, with the exception of the Live Chat Reference, which planned to offer a limited number of hours of service during the summer as a pre-trial period for selected summer research courses, in order to gain experience in using the chat software.

It was planned that the formal evaluations would include both quantitative and qualitative data about user behavior and preferences. Data would be tabulated and analyzed in December with a final report for the Pilots to be prepared in January, as part of the final report of the project as a whole. The Pilot Teams met at least once “in person”. Some would continue to meet “in person”, but more often audio-conferencing (conference calls) would be used for meetings.

Over the winter months a good deal of attention was paid to evaluating, selecting, and licensing appropriate digital resources to support the work plan and scheduled activities of each of the Pilot Teams.

In the spring consultants were hired to assist with activities related to online tutorials and the live help/ chat reference. A number of technical issues were identified and a great deal of work went into clarifying these issues and proposing and testing possible solutions. The assistance of the Novanet technical staff at this point was invaluable. Consultations were held with Functional Groups for their permission and approval. For example, the OPAC Functional Group was consulted in the preparation of the online tutorials. The group reviewed the tutorials and made helpful suggestions, ultimately approving their inclusion in the Novanet catalogue along with the newly updated Help pages. The NSOC Group also provided advice and approvals.

Marketing the New Services: Marketing the services and resources being made available during the project was undertaken in the summer months. This included the preparation and distribution of brochures to the Coordinators of Distance Education programming at eight universities (Appendix B). The brochures, as well as “fridge magnets” with the message “Shorten the Distance” and the Novanet URL were included in the course packs mailed to approximately 4000 students in July and August.

Formal Evaluation of the Four Pilot Projects: In the early fall, the working group advertised in the university community for a social scientist to be a consultant for the evaluation phase of the pilot projects. The person selected was Mike Teed, a recent

Master degree recipient in Industrial and Organizational Psychology at Saint Mary's University. The evaluation consultant held a focus group meeting with each of the pilot groups to discuss their requirements. Each group then developed key questions and activities to be included in the survey. The evaluation was conducted at various locations in the province, in a computer lab setting. Volunteer students conducted some exploratory activities to introduce them to the technologies and then answered a number of questions based on them. A separate report summarizes the findings. The participation rate of students was less than expected, such that the results cannot be generalized to the whole of Novanet distance education population. Nevertheless, the findings may prove helpful for improving services. Ideally, the original needs assessment would be repeated after a full year or more of operation. This more thorough survey would provide a way of truly evaluating the impact of these technologies on the distance education clientele of Novanet libraries.

Sustainability: Considerable time and thought was put into the question of sustainability. As far as possible, the Project implemented digital resources in a way that would facilitate continued development, should the Novanet Policy Board elect to continue supporting any of these technologies.

## **Conclusion**

The following report summarizes the activities and issues raised within each of the pilot projects. Technical Reports, minutes of meetings, and formal evaluation were studied in order to arrive at recommendations from each of the Pilot teams to the Novanet Policy Board (See Appendix C for Table of Recommendations). It is a clear summary of the experiences of each team in working out solutions to technical problems as well as training, policy and procedural issues

# **INDIVIDUAL PILOT PROJECT REPORTS**

## **Online Tutorials**

### **1. Project Committee Members**

Ann Roman- Chair- Nova Scotia Community College

Cindy Harrigan- St. Mary's University

Fran Nowakowski- Dalhousie University

Susan Cameron- St. Francis Xavier University

Janice Landry- St. Francis Xavier University

Sam Boutilier- University College of Cape Breton

### **2. Project Objectives**

To investigate the issues involved in establishing an online tutorials service for Novanet Distance Education students. To establish a pilot online tutorials service for testing with Novanet Distance Education Students.

### **3. Project Activities**

December 2002 - January 2003:

- The online tutorials committee was formed.

February 2003:

- The committee met for the first time on February 13, 2003.
- The committee chairperson was elected.
- The pilot project work plan was developed (Appendix D)
- The evaluation process was briefly discussed.
- ViewletBuilder software ordered.

March 2003:

- Committee members participated in online webinars (online seminars) for training on the ViewletBuilder software.
- Committee members attended a ViewletBuilder training session with Tamsin Bolton.
- Placement of completed Viewlets was discussed. The committee suggested using the current Help button to link to the distance education student webpage.

April 2003:

- F. Nowakowski attended an OPAC meeting to provide the group with an O-tutorials pilot project update and to ensure both groups were not producing the same material.
- Worked on developing survey questions for evaluation survey.
- Discussions began regarding Viewlet content. Committee members decided that the Viewlets would be linked from a list of "How do I?" questions listed on the student web page. A draft of this list of questions was developed.

May 2003:

- Kelli Wooshue, recent MLIS graduate, was hired to develop Viewlets.
- Kelli Wooshue attended committee meeting.
- Final draft of “How do I?” questions developed.
- Final list of survey questions completed.

July 2003:

- Reviewed and edited marketing brochure.

September 2003:

- Student brochures sent out to Distance Education students.
- Evaluation Consultant hired.

October 2003:

- Committee members met with evaluation consultant.
- Decided on method for evaluation project.
- Fran Nowakowski met with OPAC committee and reported that links to Viewlets would be on a) main catalogue page, b) on main Help Topics screen, and c) on each individual Help screen. She also reported that the Help button would be renamed Help/Tutorials.

November 2003:

- Developed in-class and take-home assignments for the evaluation trials.
- Evaluation survey edited.
- Evaluation trial schedule developed.
- Evaluation trials began.

December 2003:

- Fran Nowakowski reported that the OPAC committee would be rewriting the Help screens and the plan was to have the individual Help screens link to the appropriate, subject-sensitive Viewlet rather than the general list of Viewlets.
- Committee members discussed and decided which Viewlets should be linked from each Help screen topic.

January 2004

- Committee members met to discuss final project recommendations.
- T. Winter reported that Kelli Wooshue would be completing the Viewlet editing.

#### **4. Project Issues:**

*Project Consultant:* It was decided that building the tutorials required the attention of one person who could develop an expertise in the software. Farming out individual tutorials to members of the committee to work on would have been less than satisfactory and probably would have led to inconsistencies in the look and functionality of the tutorials. Also, we may not have made our deadline of having the tutorials up and running by September given the varying workloads and commitments of committee members. The individual hired, Kelli Wooshue, has a graphic arts and computer science background. The downside to hiring a consultant is that once she left, there was no one readily available to edit and revise the tutorials.

*Viewlet Development:* Development of tutorials had to wait until the new catalogue was implemented to ensure the Viewlets were up-to-date and accurate. As a result, the consultant used her time to learn how to use the ViewletBuilder software and to plan construction of the Viewlets. When the Novanet upgrade was implemented in test mode in early August, she began the programming of the tutorials, which were completed in draft form in early September.

*Novanet Catalogue:* It was decided, with approval from the Novanet OPAC committee, that the help screens on the Novanet Catalogue would include a link to the Online Tutorials webpage on the Novanet web site. Viewlets (2-3 minute instructions) were listed as “How do I?” questions for students to easily identify the Viewlet they wanted to access. At this time it was hoped that in future versions of the catalogue Help screens the Viewlets would be context-specific.

*Context-Specific Viewlets:* The Novanet OPAC committee reported that they were working on rewriting the catalogue Help Screens and that the plan was to have the individual Help screens link to the appropriate context- specific Viewlet directly rather than the general list of Viewlets. The pilot team committee decided which Viewlets should be linked from each Help screen topic (Appendix E).

*Viewlet Editing:* Members of the pilot teams tested the Viewlets from their numerous locations around the province and provided feedback and suggested changes and additions. One last revision was completed before the Assistant Project Manager met with D. Boudreau and the Online Tutorials were posted to the Novanet Distance Education (Student) Web site on September 17.

*Software Requirements:* Once the Viewlets were posted, there seemed to be a display problem in some browsers. The Viewlets did not display properly in Netscape, and at times did not display in Internet Explorer. After some investigation, it was discovered that Flash 5 software or higher was required. Once committee members installed this software onto their computers, the Viewlets consistently displayed correctly. A notice of this software requirement as well as a link to download the software was added to the student webpage.

#### **5. Evaluation**

The project hired an evaluation consultant to implement the evaluation process for all 4 pilot projects. The final evaluation report is included as Part 2 of this report.

## **6. Project Outcomes**

### Anticipated:

- Each member of the pilot team became familiar with the ViewletBuilder software.
- Short point-of-need instructions were developed for the Novanet catalogue.
- Tutorials would be integrated into the Novanet catalogue.

### Unanticipated:

- The pilot team hired a consultant to develop all Viewlets.
- The sophisticated level of instruction that can be provided in a 3-4 minute Viewlet.
- 12 Online Tutorials completed (had originally thought it would be five or six).
- This pilot team was the largest of all four teams.
- That the tutorials would be used 595 times in 4 months.

## **7. Sustainability**

The Online Tutorials are now available on the Novanet Distance Education web site. Approved by the OPAC Committee, these are linked from the Help/Tutorial button on Geopac, for all users. Copies of the software (Viewlet Builder) were purchased for Novanet and distributed to the pilot participants. All project participants have received training in the use of ViewletBuilder. Maintenance time will be minimal until the next system upgrade. Updating the GeoWeb help pages has been completed by the OPAC Functional Group.

## **8. Recommendations**

Recommendation #1.1: That Novanet maintains the Online Tutorials by hiring a student annually in the summer to learn the software and update the Viewlets if necessary and until such time as a new integrated library management system is implemented; and that Novanet produce an Online Tutorial for each of the services offered by Novanet to support distance and remote users of Novanet.

Recommendation #1.2: That Novanet maintains a license code for the ViewletBuilder software to facilitate the annual updating of the Novanet Online Tutorials.

Recommendation #1.3: That Novanet develops a marketing plan that includes a brochure similar to the project brochure, in sufficient quantities to be distributed each term to distance students and faculty at all Novanet institutions.

### **Electronic Reserves**

#### **1. Project Committee Members**

G. Pace- Chair- Dalhousie University

K. Clare- St. Mary's University

S. Dwyer- Dalhousie University

J. Riggs- Dalhousie University

#### **2. Project Objectives**

To investigate the issues involved in establishing an e-reserve service for Novanet Distance Education students. To establish a pilot e-reserve service for testing with Novanet Distance Education students.

### 3. Project Activities

December 2002 - January 2003:

- The e-reserves pilot project committee was formed.
- The committee met for the first time on January 30, 2003.
- The committee chairperson was elected.
- The pilot project work plan was developed. (Appendix F)
- Methods of e-reserves was discussed

February 2003:

- Committee members had a site visit to Acadia University to investigate their e-reserves service (Acadia staff mentioned that distance students with either poor telecommunication connection or computer equipment had difficulties in receiving and opening lengthy documents). (Appendix G).

April 2003:

- Sandy Dwyer completed reserve inventory at Dalhousie. She found that of the 389 articles on reserve 113 are available electronically.
- The committee was informed that Geoweb 5 would be installed by mid-late May or June.
- 3 Canon DR-2080 Scanners were leased and distributed to NSAC, Dalhousie and St. Mary's.
- The committee was informed that students would need to be authenticated in order to access e-reserves.
- As a test, the committee decided to put 10 electronically-available items on reserve. They also decided to test the scanning process by scanning 1) class notes and 2) use articles for which we must get copyright clearance.

May 2003:

- EZProxy discussions began.
- Ella Fay Zalezsak successfully tested putting an e-reserve link in the opac but it did not show up in the Reserve module. Sandy Dwyer and Richard Lamer began the lengthy and ultimately unsuccessful pursuit for the solution to this problem.
- Committee members developed a draft of evaluation survey questions.

August 2003:

- Confirmed that scanned notes could be housed on the Dalhousie server.
- S. Dwyer, S. Noseworthy, and A. Kutty from Dalhousie tested the scanning of class notes with the url to notes displaying in the Reserve module.
- Requests for copyright clearance sent to 2 publishers (Elsevier and Sage). Elsevier provided permission for one article to be put on e-reserves with the stipulation that access to the article be restricted to students registered in the course. Sage did not give permission but advised to resubmit request.
- Recruited Dalhousie faculty member, Marion Brown, to participate in pilot.

- Student brochure reviewed and suggestions for improvement made.

#### September 2003:

- Sage publications provided a letter of permission to make one article available electronically subject to a number of conditions. Conditions include payment of fee of \$60.00, use of article restricted to those students registered in the course, proper acknowledgement be made of the original place of publication for any material quoted in the article. (Appendix H)
- Committee members decided that there would not be time to put Marion Brown's article on reserve due to the lengthy copyright clearance process. (Appendix I)
- Committee members discussed other options for offering e-reserves since getting copyright clearance for print materials has been so time consuming and costly. The following suggestions were made: a) only those items already available electronically be put on reserve, eliminating the scanning process and the copyright clearance issue, b) have a professor's class notes scanned and put on electronic reserve- eliminating the copyright clearance issue, and c) encourage individual professors to make links available to electronically available articles on their own websites.
- The 856/852 tag issue, which grew out of the previous unsuccessful testing of links, began.
- EZProxy was purchased.
- Evaluation consultant hired.
- Student brochures mailed to distance education students.

#### October 2003:

- EZProxy installed by Dylan Boudreau from the Novanet office.
- Committee members met with evaluation consultant.
- Decided on method for evaluation project.
- Work continued on the reserve module.

November 2003:

- Developed in-class and take-home assignments for the evaluation trials.
- Evaluation survey edited.
- Evaluation trial schedule developed.
- Evaluation trials began.
- Work on enabling 852\$U continued.

December 2003:

- Gwyn Pace, Sandy Dwyer and Ella Fay Zalezsak wrote up e-reserves 852/856 issues report. (see Appendix J)

January 2004:

- Dylan Boudreau requested a quote from GEAC for the cost to reconfigure the reserve module.
- Committee members met to discuss final project recommendations.

### **3. Project Issues**

There is a real potential for the use of e-reserves by all Novanet libraries not only for distance students but for all students requiring access to reserve material. However the following issues need to be resolved before e-reserves can be made fully available to Novanet clients.

*Copyright clearance:* Licensing arrangements for full text databases and electronic journal subscriptions usually include e-reserve use as a part of the license agreement. Whether it is included or not licensed users have direct access to these resources via database searching or opac links. Off-campus access is not available to unlicensed users

Faculty copyrighted material eg. Classnotes does not require copyright clearance for inclusion on e-reserve.

Copyright clearance is really only necessary for material that has been published in paper and which is not available in electronic format. The process for obtaining copyright clearance for this material has proven to be expensive (\$20-100 per article), restrictive (only available to students in the course for which the item is placed on Reserve) and time consuming (each item requires an individual request to the publisher by email or web form, responses vary from a few days to several weeks). These obstacles discourage libraries or the requesting faculty from pursuing this option and in consequence very few such items ever get put on e-reserve. The result is that unless the faculty provides workbooks to their students, or library staff sends individual copies of reserve articles to distance students, usually at an added cost to the student, the majority of articles on Reserve remain accessible only to those who can visit the library in person.

*Restricting electronic access of copyrighted material to course members only:* If copyright clearance is obtained for print only material then means must be found to restrict e-access to this material to only those individuals enrolled in the pertinent course. For Novanet libraries there appear to be several options to enable this process.

Individual institutions can set up links between their student registration system and the e-reserve system so that only those registered in the course are given access. This

process was not tested and would require technical expertise and policy agreements to be established between the library and the student records office. This process would have the benefit of being automated and working from accurate up to date registration records.

Within a Novanet library individual course registration could be provided by the faculty to the library reserve or systems staff. Staff could then establish either individual user names and passwords for registered students or group usernames and passwords for faculty to distribute to class members. This arrangement would require systems staff to establish the links between the user name/passwords and the e-reserve items/courses.

The Novanet office could be provided with the same type of information by individual Novanet libraries and using the proxy server establish user names and passwords for individuals or courses. Depending on the number of courses/students and e-reserve items the time required for Novanet systems staff may or not be available. D. Boudreau was able to set this option up for the pilot project but because of the linking problems there was not an opportunity to fully test it.

*Scanning and saving items:* Each paper item that is placed on e-reserve requires scanning, saving and then linking to the Novanet system. This can be done in-house by libraries with appropriate scanners, servers and staff to handle the process. The saving process could be handled by Novanet staff if individual libraries did not have the equipment or expertise and Novanet staff had the time.

*Entry of material in the Reserve and OPAC modules:* As explained in Appendix J there are technical difficulties in displaying links in the appropriate locations in both the opac and the reserve modules. Quotes have been requested from GEAC for the three acceptable solutions to this problem. Until one of the solutions is implemented e-reserve entries will not be available to any Novanet site. When it is implemented the staff responsible for Reserve entry at each Novanet site would be expected to input the records into the LMS.

*Relationship of library e-reserves, electronic journals access and faculty use of Webct:* As mentioned under copyright there appears to be three types of material that e-reserves may be useful in making available to distance users, links to electronic journal articles subscribed to by the library, faculty course notes and articles only available in paper. However with access to electronic journals available to all institutional affiliates the need to link ejournal articles to the reserve module may be unnecessary. With the use of Webct and university resources available to faculty perhaps library scanning of course notes and paper articles for reserve purposes may also be unnecessary

*Telecommunications and computer equipment needs of students in order to access e-reserve items:* Acadia staff advised the Committee of difficulties some students, especially in remote areas, had in receiving and opening e-reserve documents because of inadequate communication connections or poor computer equipment. To reduce these difficulties the students should perhaps be expected to have the appropriate equipment and software available for their use with e-reserve material.

#### **4. Evaluation**

Evaluation of the E-Reserves pilot was not fully possible due to the technical difficulties encountered with the display of the url links in the opac and reserve modules.

See also Mike Teed's attached Evaluation Report, included as Part 2 of this report.

## **5. Outcomes / Discussion**

Without the investment of \$3600.00, Novanet libraries will be unable to set up an e-reserve service. As noted in Appendix J there are three solutions to the current Reserve URL linking problem. The first option of fixing the 852u capability in Reserve and adding the 856 to 852 display mapping as is now available for the cataloguing module is the most desirable. This option would not only fix the Reserve linking problem but would also streamline the process which cataloguing staff have to use to make holding links appear appropriately in the opac.

It was hoped that the E-Reserve pilot project would research and demonstrate how e-reserve items at any Novanet library could be made available to any Novanet Distance Education student. Upon investigating licenses and copyright it soon became clear that only CNSLP items or open access websites are available to all Novanet distance students. All other licensed or copyright cleared resources may only be accessed by those individuals either affiliated with the institution that holds the journal or database license or who are registered members of a specific course.

In the case when items such as CNSLP material, open access websites and licensed subscriptions are readily available to the clientele who need them the question that then arises is why would we want to replicate the link on e-reserves? It is suggested that we wouldn't and that instead library staff should advise faculty of how to access this material directly and leave it to the faculty to provide their students with the information or a link from their WebCT pages.

Until such time as all Novanet or CAUL electronic subscriptions are available to all Novanet or ASIN users there will be uneven access to electronic materials. In the meantime adding the full bibliographic information to all Reserve items would assist those people attempting to locate the material but who do not have off-campus electronic access rights.

As mentioned earlier obtaining e-reserve copyright clearance for print material is expensive and time consuming. Because use is restricted to those individuals taking the course it is expected that these requests would be handled by the individual Novanet institution offering the course and not Novanet as a whole. In most cases absorbing these costs will be prohibitive for the libraries. For example under this arrangement it is estimated that it would cost the Killam Library an extra \$12,500 per annum (250 articles x an average \$50.00 per article) and 77 days (250 articles x 2 hours) of staff time to obtain copyright clearance for the paper articles currently on Reserve. Although it is unlikely that all paper articles would be scanned the copyright clearance process is not one that library staff are ready to embrace. Faculty currently apply for copyright clearance for print reserve material so it is therefore suggested that the faculty or their departments be responsible for the application and payment for copyright clearance (Appendix I outlines the recommended steps). Upon receiving evidence of copyright clearance from the faculty member the library staff could then make the item accessible via the library's e-reserve scanning, saving, linking and authenticating processes. If the Novanet library did not have the staff or technical support to handle the saving and authenticating processes then perhaps, if time and equipment permitted, the Novanet staff

could handle those processes on the library's behalf. Library staff would still scan the item and enter the record into the Reserve module.

With the advent of WebCT more and more faculty are now making material like their class notes directly available to their students. If a faculty member does not have access to a product like WebCT then the library or Novanet could possibly scan, save and link the material. No access authentication would be necessary for this type of material.

Although the e-reserve service was unable to be fully tested in the time available a great deal was learned about the technical and copyright processes involved in establishing a "home-grown" solution to e-reserves. In the last month of the pilot project the Committee Chair through informal discussions with Pat Warner, the Head of Access Services at the Queen Elizabeth II Library at Memorial University learned that they too were investigating the establishment of an e-reserves service and were considering the use of Docutek's commercial product E-Res. This may be a product which individual Novanet libraries may also wish to pursue. Whether the Novanet libraries pursue the development of an in-house system, the purchase of a commercial product or just re-evaluate their reserve policies for material available electronically and entering of bibliographic information it is hoped that the experience gained by the Novanet Distance Education E-Reserves Pilot Project Committee will prove helpful in developing better e-reserve access not only for Distance students but for on-campus users as well.

The Committee would like to thank the following people for their generous assistance with the Novanet Distance Education E-Reserves pilot project: Novanet Distance Education Committee Administrative Team- Bonnie Waddell and Todie Winter; Novanet Systems Staff- Dylan Boudreau, Richard Lamer; Dalhousie University, Killam Library- Jim Kennedy, Ashwin Kutty, Joyline Makani, Terry Nikkel, Shane Noseworthy, Fran Nowakowski, Janice Slauenwhite, Ella-Fay Zalezsak; Dalhousie University, Maritime School of Social Work- Marion Brown, Adrienne Schatzadeh; Acadia University- Ann Hennigar, Steve MacNeil, Karen Padovani; University of Calgary- Wendy Stephens; Sage Publishers- Copyright Clearance Office; Elsevier Publishers- Copyright Clearance Office.

## **6. Recommendations**

Recommendation #2.1: That Novanet invest in changes necessary to allow entry of URL links in the Reserve Module (RBR) so that they display and are active in both the OPAC and public reserve locations in order to provide Novanet Institutions with the option of offering an electronic reserve service.

Recommendation #2.2: That Novanet technical staff prepare a step-by-step guide for saving e-material to the Dalhousie server and authenticating users on the Novanet Proxy server.

Recommendation #2.3: That Novanet request the Cataloguing and Lending Service Functional Groups to enter full bibliographic information for all items being placed on reserve.

## **Live Help/Chat Reference**

### **1. Project Committee Members**

J. Makani- Chair- Dalhousie University  
A. Sehatzadeh- Dalhousie University  
T. Mgwigwi- Dalhousie University  
G. Bertrand- St. Francis Xavier University  
B. Waddell- Nova Scotia Agriculture College

#### **Volunteer Librarians:**

A. Barrett- Dalhousie University  
M. Paon- Dalhousie University  
S. McKibbon- Dalhousie University  
E. MacLean- St. Francis Xavier University

### **2. Project Objectives**

To investigate the issues involved in establishing a Live Help/Chat Reference service to distance education students. To establish a pilot Live Help Chat Reference service for distance education students.

### **3. Project Activities**

December 2002 - January 2003:

- The Live Help Committee was formed.

February 2003:

- The committee met for the first time and elected James Watson as committee chair.
- During this meeting, hours of service and chat software were the main topics of discussion.
- The committee work plan was developed (Appendix K)

March 2003:

- Committee members decided to have a summer trial focusing on Social Work students.
- It was decided that it would be best to hire a library school student to assist with provision of Live Chat Reference.
- At this time, the software evaluation discussion continued.

May 2003:

- Library school student, Thumeka Mgwigwi, was hired.
- Software evaluation discussion continued.
- Marketing materials discussed.

June 2003:

- Committee members decided to use the QuestionPoint software for the pilot project.

- Committee members participated in a Dalhousie library resources orientation with F. Nowakowski, A. Barrett and J. Makani.
- Content for the Live Help webpage was developed.
- A draft of survey questions was developed.
- Marketing materials developed.
- Established Live Help email address: livehelp@novanet.ns.ca
- T. Mgwigwi began work on Reference Resource Manual
- Work began on Live Help logo.

#### July 2003:

- Final draft of student brochure completed.
- Electronic brochure sent out to Social Work students.
- Live Help summer trial began with limited hours: Thursday 6-9pm, Friday 6-9pm, Saturday 6-9pm, Sunday 6-9pm.
- J. Watson moved out of province, J. Makani took over as Chair of committee and G. Bertrand took over as technical advisor for the project.
- Technical issues began i.e. committee members had trouble downloading the QuestionPoint patron applet.
- Decided to put Live Help logo on the Dalhousie Distance Education web page and the Live Help student page on the Novanet web site.

#### September 2003:

- First meeting with volunteer reference librarians and committee members.
- Expanded Live Help hours began: Monday- Friday 2-4pm, Friday- Sunday 6-9pm.
- Live Chat Reference Librarian schedule developed (Appendix L).
- Decided to purchase the QuestionPoint software for one year.
- Final draft of the Resource Manual distributed.
- Copies of the student brochure mailed out to Novanet Distance Education students.
- Evaluation consultant hired.

#### October 2003:

- Committee members met with the evaluation consultant.
- Decided on method for evaluating project.

#### November 2003:

- Developed in-class and take-home assignments for the evaluation trials.
- Evaluation trial schedule developed.
- Evaluation survey edited.
- The problems with downloading patron applet were identified.
- Evaluation trials began.

#### December 2003:

- Committee members and volunteer librarians decided to continue providing Live Chat reference after the project had ended.

#### January 2004:

- Committee members met to decide on pilot project final recommendations.
- Continuation of service details were discussed.

#### 4. Project Issues:

*Software decision:* Deciding what software to use was somewhat challenging given the committee's limited experience. Originally, the committee decided to use the software LiveTeam. This decision was abandoned when the supplier withdrew his support for the project. After a demonstration of two other software choices, a decision was made to go with QuestionPoint which is offered by OCLC.

*Hours of Service:* A trial run of the QuestionPoint software began on July 1 with a pre-trial testing period of the Live Chat Reference service for one Social Work summer course taking place between July 12 and August 22<sup>nd</sup>. The expanded hours began at the beginning of October. Hours of service are Monday – Friday 2:00pm – 4:00pm and Friday – Sunday 6:00pm – 9:00pm. Hours were designed to complement the reference services in place at various institutions, by being offered in the evenings and weekends for distance students who may be accessing the service from different time zones.

*Software purchase:* By September it became evident that because the trial service was designed for librarians to chat with other librarians, it was unsuitable for a trial that involved students. A decision was taken to purchase the software for Novanet. This allowed us to configure the software for Novanet.

*Librarian Participation:* Thumeka Mgwigi, a Master of Library and Information student, was hired as the consultant for this project to provide Live Chat Reference and to prepare a resource manual for all those librarians who will be taking shifts in the fall. In August a memo went out to the Novanet List inviting interested staff to participate as information providers. Four librarians responded to this invitation. The volunteer librarians and committee members participated in the training sessions and covered all weekday shifts. The weekend shifts were covered by Thumeka Mgwigi.

*Resource Manual:* To assist librarians with answering questions from multiple institutions, T. Mgwigi prepared a resource manual. The resource manual included contact names and numbers, individual library policies and lists of databases and online resources available to students in each institution. A Resource Manual was prepared for each person taking a shift as an information provider.

*Live Help Logo:* Deciding on a Live Help logo was not a difficult process. With suggestions submitted by James Watson (former committee member) and Kelli Wooshue (consultant for the online tutorials committee) an attractive logo was developed.

*Downloading Software:* The client/librarian software for QuestionPoint must be downloaded onto a server and a smaller set of files onto the librarian's PC. An applet/plug-in must be downloaded by students on the machine they will be using which appears on their browser when they access the service through the Novanet Distance Education Web Page. Each institution must register the site to enable the plug-in to operate. Students having to download an applet is one major disadvantage of the software. Originally committee members thought downloading the applet to be a major problem with many librarians finding they were not able to complete the process. It was discovered that downloading the software was not the problem. The problem was that the applet was not showing up because the urls registered with QuestionPoint were incorrect. Once the following 3 urls were registered with QuestionPoint, the applet appeared in the

browser every time: 1) <http://saturn.novanet.ns.ca> 2) <http://novanet.ns.ca> 3) <http://www.novanet.ns.ca>.

*Training:* Given the groups limited experience with providing chat reference, training was an issue. Two separate layers of training were required. One to familiarize librarians with the chat software (QuestionPoint from OCLC) and the other to familiarize librarians with the online Reference Resources for selected disciplines (Nursing, Business Administration, Social Work for the summer pre-trial). The software orientation was completed on Thursday, June 5, 2003 via a conference call uniting all participating librarians from their home institutions to OCLC in Dublin, Ohio. The reference training was held on Thursday June 26, 2003 at Dalhousie with the assistance of consultants Fran Nowakowski and Ann Barrett, senior librarians at the Killam and Kellogg Libraries.

*Additional Training:* Committee members brainstormed ways to improve their training on the QuestionPoint software. Some creative ideas surfaced. They include the following:

- 1) Pick a morning when exams are just about over and have 3 of us log on as librarians and 3 as users and then change roles after 15 minutes or so.
- 2) Prepare a list of a hundred or so practice questions. Role playing clients could randomly pick a question from the list. If the practicing information provider answered the hundred questions they would be considered to have some experience (and could get a reference from the group). This may be attractive to library school student volunteers. The reference would be supported by documentation. Also, if anyone wanted a private consultation or "review" and commentary of their transcripts, that could be arranged as a separate exercise, perhaps by someone outside the group, such as a retired reference librarian. If a question came up that they'd had before they could just say "Pick another please".
- 3) Perhaps in addition to the schedule for the "Librarian on Duty", we could also sign up for a once a week time slot to role play at being a patron during the Monday-Friday 2pm-4pm shifts. We could end the session immediately if a real patron called.

*Marketing:* 4,000 Brochures and Fridge magnets were distributed in course packs to those participating in the trial. A Distance Education website was developed on the Novanet website containing instructions, hours of service and a link to the download page.

## **5. Evaluation**

The project hired an evaluation consultant to implement the evaluation process for all 4 pilot projects. The final evaluation report is included as Part 2 of this report.

## **6. Outcomes**

### Anticipated

- Chat software would be installed.
- Information providers would be trained.
- Chat Reference service would be marketed to Distance Education students
- Students could access the service without difficulty between September-December.
- Participation in the evaluation by Distance Education students would provide statistically reliable data.

### Unanticipated:

- The difficulty of training and practice in a consortium environment.
- Technical problems of downloading the applet were not resolved until October (multiple Novanet URL's need to be registered).
- Participation of Distance Education students in evaluation did not result in data that would be generalized to whole Distance Education population.
- The enthusiasm with which the service was received by staff (4 volunteers and others intended as information providers).
- The lead time needed from marketing the service and engaging the interest of Distance Education students.
- Did not expect to have this service mentioned on CBC Maritime Noon phone-in show.
- St. Francis Xavier University systems librarian administering the software.

### **7. Sustainability**

Question Point, a library product that uses chat software to deliver an online reference service was purchased for Novanet by the project. The software is licensed until September 2005. Complete Live Chat Reference service has been implemented since September 2003. Staff at STFX, DAL KILLAM, DAL KELLOGG (soon NSAC) are taking shifts 2:00 - 4:00 pm Monday - Friday, with the project funding a library school student to work weekends - Fridays, Saturdays and Sundays from 6:00 - 9:00 pm. A two hour demonstration plus two training days have been held, one online and one in person. The software is being administered by Gordon Bertrand at STFX and is housed on a server at STFX with a link from the Novanet distance education student webpage.

## **8. Project Recommendations**

Recommendation #3.1: That Novanet continue support of the Live Help/ Chat Reference service as a pilot program until September 30, 2005.

Recommendation #3.2: That Novanet market electronically the Live Help/ Chat Reference Pilot Program to all users, effective immediately.

Recommendation #3.3: That Novanet establish a Live Help/ Chat Reference Working Group to oversee a Live Help/ Chat Reference Pilot Program whose terms of reference would include:

- 1) Coordinate a marketing campaign to increase awareness of support services available for remote and distance education users of Novanet.
- 2) Develop procedures enabling remote or distance users to set up an appointment outside of regular service hours.
- 3) Develop a formal training and online practice program for new volunteer information providers.
- 4) Participate in Knowledge Base (shared distributed international reference service) as part of the training program.
- 5) Develop a help page as well as an online tutorial (Viewlet) for students and information providers.
- 6) Examine how the Live Help / Chat Reference service can be integrated into other services offered by Novanet.
- 7) Hire consultant to provide service coverage on weekend and as back-up.

## **Electronic Collections**

### **1. Project Committee Members**

Pam MacLean- Chair- St. Francis Xavier University  
Cathy Chisholm- University College of Cape Breton  
Keith MacKinnon- Nova Scotia Community College

### **2. Project Objectives**

To investigate the issues involved in establishing an electronic book collection for Novanet Distance Education students. To establish a pilot electronic book service for Novanet Distance Education students.

### **3. Project Activities**

December 2002 - January 2003:

- The electronic book committee was formed.

February 2003:

- The committee chairperson was elected.
- The committee met for the first time on February 5, 2003.
- The pilot work plan was developed (Appendix M)
- Decided on arrangement of student web to be posted on the Novanet website.
- The evaluation process was briefly discussed.

March 2003:

- Electronic book demonstration at St. Francis Xavier by Andy Spilioe from netLibrary.
- Content for the student webpage developed.
- Distance Education Student webpage posted on the Novanet website.
- Course profile forms developed (Appendix N)
- Course profile forms sent to faculty within Novanet.

April 2003:

- Reviewed list of available netLibrary e-books in Business (accounting, economics, finance, human resources, and management), Nursing, and Education.
- E-book lists sent to members of the Distance Education Working Group to be forwarded to appropriate Distance Education faculty for title selection.

May 2003:

- G. MacPherson, Head of Cataloguing, at St. Francis Xavier, volunteered to catalogue all e-books.
- Committee members reviewed marketing materials.
- netLibrary title selections submitted by DE faculty.
- Developed layout of marketing magnets.
- Developed survey questions to be used for project evaluation.
- Letter of project description developed.

July 2003:

- E-books purchased from netLibrary.
- E-book records incorporated in the Novanet catalogue.
- Committee members edited student brochure.

September 2003:

- Student brochures and magnets sent out to distance students.
- Frequently asked questions on students webpage developed further.
- Evaluation consultant hired.

October 2003:

- Committee members met with evaluation consultant.
- Decided on method for evaluation project.

November 2003:

- Developed in-class and take-home assignments for the evaluation trials.
- Evaluation survey edited.
- Evaluation trial schedule developed.
- Evaluation trials began.

January 2004

- Committee members met to discuss final project recommendations.
- E-book access fees discussed and it was reported that students would have online access to Collection #1 until July, 2005.

#### **4. Project Issues:**

*Faculty Participation:* Gathering faculty input was an issue initially when attempting to compile an e-book purchase list. The committee developed course profile forms but the response rate was extremely low. Response rates were higher when faculty was sent e-book lists to choose from.

*Authentication of students and professors:* Concerns surfaced around authentication issues because the committee was unsure of how to limit access to e-books to Novanet students and faculty only. However, OCLC were not concerned about controlling access to the test set of e-books because the e-books were being marketed to Novanet distance students only.

*Cataloguing:* It was originally thought that importing the records for the 366 e-books might be an issue. It was not. Cataloguing staff at STFX offered to do it at no charge, and estimated it would take approximately 3 days to create the records and links.

*netLibrary website:* The netLibrary website posed a number of problems:

- 1) Patrons doing a search on the netLibrary site within the Novanet collection by default also searched netLibrary's "Publicly Accessible Books" collection. Since the purpose of our pilot is to develop discipline specific collections, this was not acceptable. To eliminate these books from the Novanet search, patrons have to 'uncheck' the "Publicly Accessible Books" box.
- 2) It was not obvious to the user what the loan period is for an e-book. Committee members developed a FAQ to guide students to find this information.

*Novanet Catalogue:* Since a number of Novanet institutions have purchased netLibrary e-books which are restricted to use by students at that institution, not all e-books in the Novanet catalogue were Novanet titles, nor were they accessible by Novanet users. This was, and remains to be, confusing for our patrons. This suggests that the Novanet Policy Board might consider having e-book lists selected by Novanet institutions routed through the Novanet office so that they could be enjoyed by all Novanet users.

## **5. Evaluation**

The project hired an evaluation consultant to implement the evaluation process for all 4 pilot projects. The final evaluation report is included as Part 2 of this report.

## **6. Outcomes**

### Anticipated:

- That multiple faculty would make electronic book suggestions for purchase.
- An increased awareness of how electronic books work.

### Unanticipated:

- 366 titles were purchased (had originally anticipated only 200).
- The service was easy to implement.
- Downloading Marc records of 366 books took very little time.
- That each user would need an account set up with username and password in order to check-out an e-book.

## **7. Sustainability**

A total of 366 texts in the disciplines of Nursing, Education, and Business were selected by faculty in those disciplines. These titles are available through either the Novanet catalogue or the Novanet web page for DE students. Records in the Novanet catalogue have live links to the electronic publisher (netLibrary). The titles, initially leased for one year, have been purchased outright for Novanet and online access paid until July 1, 2005. Initial feedback suggests that the Business titles have been especially useful. At this point in time, it appears far easier to manage a discipline-specific collection than individual titles, held by individual libraries. Offerings presently are quite limited. Until publishers have a larger core collection, it may be easier and more economical to purchase a collection for the use of all Novanet libraries. With hopes to keep the Novanet e-book collection current and sustainable, a small collection of recently published e-books was purchased in January 2004 with online access available until January 2005.

## **8. Recommendations**

Recommendation #4.1: That Novanet continue support of the e-collection purchased for Novanet (15% of purchase price- paid annually) subject to a re-evaluation of usage in March 2005.

Recommendation #4.2: Based on what the Pilot Team considers to be a very positive response to the discipline specific e-collections (433 items checked out over 4 months

from a collection 360 titles), that Novanet pursue the consortium licensing of a core collection in the three disciplines of business, education and nursing.

Recommendation #4.3: That Novanet develop an information package to promote the concept of e-books within the Novanet community.