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INFORMATION COMMONS PLANNING: STRATEGIC AND OPERATIONAL CONSIDERATIONS

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Transformasi Perpustakaan Melalui Teknologi Maklumat

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Abstract:

This session will introduce you to planning issues and operational elements that you will need to consider when implementing an Information Commons. The planning process, service models, collaboration issues and relationship building will be discussed in context of a case study of the University of Auckland Library's Information Commons Group. The Information Commons Group consists of the large purpose-built Kate Edger Information Commons (established in 2003) on the City Campus, the smaller Grafton Information Commons (established in 2004) on the Medical Campus and the library-based Epsom Information Commons (established in 2006) on the Education Campus. The group comprises three models of co-location, collaboration, integration and innovation successfully operating within the same IT, service and staffing infrastructure. These student-centred learning facilities provide proactive integrated learning support in a collaborative, interdisciplinary physical and virtual learning environment.

Establishing a successful Information Commons facility requires strategic thinking and positioning as well as tactical or short-term planning. Strategic thinking and planning are essential to ensure that the facility and associated services are strongly aligned with the institutional mission, strategy and values. It facilitates the development of collaborative ventures as it presents a campus-wide view. Tactical planning develops the detailed operational plans and procedures required for a smooth running service.

The fast changing IT environment and its impact on human interaction, expectations of the Internet generation, changes in Higher Education and financial budgets are some of the drivers that will play an important role in planning. The planning and processes associated with the design and development of the Information Commons at the University of Auckland were challenging and stimulating. The Kate Edger Information Commons, which opened on the University of Auckland City Campus in May 2003, provides a learning environment with a variety of group and individual study spaces, multi-purpose computers and easy access to core information resources and technologies to all students. The Kate Edger Information Commons has over 1300 study and casual seats, including around 500 multi-purpose computers. The Information Commons includes group work areas, private study spaces, open consultation and adaptable service points that allow a greater tolerance of noise and activity. The Information Commons facilities and services offer opportunities to develop IT, information literacy, English language and learning skills in an integrated and supportive learning environment.

The University of Auckland was faced with an urgent need to increase the amount of study space available in the central area of the City Campus as the libraries were overcrowded and the ratio of study space to students was out of alignment with that in similar institutions. Learning support services for students were located in different buildings on campus. The Student Learning Centre (SLC), providing academic learning skills development, had inadequate teaching facilities and staff offices. The English Language Self-Access Centre (ELSAC) was located approximately 1.5 km from the centre of the City Campus. The ever increasing rate of computer use for learning, teaching, research and communication has lead to significant changes in student characteristics, needs and expectations. The impact of student-centred teaching methods such as problem-based learning and group work had resulted in an increasing need for more flexible learning spaces. Students expect access to computers and a networked environment that provide an integrated suite of tools and resources anytime and anyplace.

An Information Commons concept was developed as part of the University Library's vision for improved services to the University community. The University Library, Information Technology Services (ITS), SLC and the ELSAC collaborate to provide a proactive integrated learning environment for students. The development of computer and information literacy, academic and English language skills is a key focus area of the Information Commons.

Goals, desired outcomes, mission, vision:

- Convenience – centralised , one-stop shop for IT, information and learning needs
- Expert support – librarians, IT specialists, writing consultants, media specialists, language advisors, learning advisors, peers
- Access to a high-tech environment – latest hardware, software, multimedia, networks, file storage
- Accommodate learning styles: group and individual learning
- Foster IT and Information Literacy
- Self-service, satisfaction, seamlessness
- Focus on computing, comfort and collaboration – community
- Seamless technology-enabled learning environment

Collaborative environments integrate the services of learning support providers such as IT professionals, librarians, learning advisors, instructional technologists, multi-media producers, language advisors, writing advisors and others. The organisation and degree of the collaboration will vary, but will include participation by at least two units, some co-location or sharing of physical space, and staff members committed to collaboration.

ELEMENTS OF AN INFORMATION COMMONS:

Physical
- Location is critical
- Variety of learning and social spaces
- Flexible furniture design & arrangement
- Access and security

Virtual
- IT environment – latest hardware, multimedia, ubiquitous high speed networks, cheap large personal file storage, small mobile personal devices
- Productivity and presentation software
- E-content: e-journals, e-books, databases, image files, finding aids, IC web site detailing resources and support etc.
- Enterprise systems – learning management, student administration and enrolment, portal
- Research, communication, production
- Desktop software environment – management and future development
- Standardised authentication and authorisation – single sign-on
- IT support and maintenance
- Systems security

Learning
- Accommodating learner-centred education and different learning styles
- Independent or solitary learning
- Learning communities: collaboration, group work, discussions, peer coaching
- Technology-enabled and technology-free
- IT providing learning opportunities that surpass the confines of space, place and time
- Collaboratively involved with campus-wide learning initiatives (Learning Commons) e.g. integration of library e-resources and virtual reference services with learning management system, collaboration with faculty in core curriculum revision

Service
- Increased service expectation and demand for quality – student as the customer
- New service models: mix of services, synergy of skills and combined expertise
- Integrated dynamic learning support: IT & information literacy, academic learning, language support
- Continuum of service: access, use, evaluate, manage, integrate, and create information
- Multi-skilled staff
- Student self-service options
- Separate service desks: reference, computing, learning advice, multimedia production or integration

Social
- Recreational spaces
- Place of community building
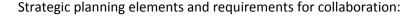- Promotes social learning

Management
- Merging and supervising staff from two or more organisational units
- Lines of communications
- Performance measures

PLANNING CHECKLIST:

Strategic Planning:

- What is the Information Commons?
- What are the institutional drivers?
- Strategic fit with institutional plans and policies?
- Who are the potential institutional partners?
- What are the vision and desired outcomes of the Information Commons?
- Project scope
- Key champions – project sponsorship
- What are the goals and objectives for the next several years?
- Consultation with stakeholders.

Strategic planning elements and requirements for collaboration:

Changing environment:
- Institutional and departmental climate: readiness or opposition

Vision and relationships:
- Commitment of organisation and leaders
- Shared understanding of the institutional vision, mission, policies and strategic plans
- Alignment with institutional mission, values and campus-wide priorities
- Impact on learning, teaching, research and service delivery
- Strategic fit of learning support providers – improving a core function of the institution
- Creation of new shared mission, goals and desired outcomes based on the delivery of content and services related to digital technology

Structure, responsibilities and communication:
- Clearly defined and interconnected roles
- Joint strategies and agreed performance measures to ensure customer satisfaction
- Clear communication, negotiation skills and shared vocabulary
- Formal memorandum of agreement or service level agreement

Authority and accountability
- Leadership is distributed
- Control is shared and mutual
- Risk is shared
- Agreed service levels and consistent service quality

Resources and rewards:
- Longer-term pooling of resources
- Resources are used sensibly and creatively
- Increases available resources and reduces unit costs
- Units share in results, credits and criticism

People:
- Success is based on a cross-section of stakeholders, and not dependent on a single personality
- Requires mutual respect, trust, mentoring and a sense of humour
- Most critical factor – brings the space to life

Operational Planning:

Design brief:
- New construction or alteration of existing space?
- Define the purpose of space and functions
- Identify the needs and requirements of all stakeholders
- Space and size requirements

Project Management:
- Project Manager
- Method (team, committee, departments)
- Resources, commitments for planning
- Project tracking, outcomes
- Accountability and reporting
- Timeline & budget
- Conduct focus groups, interviews

Project teams:
- Membership and size
- Clarify roles, responsibilities and required team skills
- Establish effective communication channels between teams and with rest of staff
- Documentation
- Review and disestablishment

Planning Document

- Definition
- Purpose
- Mission, Vision, Values
- Description
- Partners
- Relationships
- Timelines
- Standards

Implementation Plan

- Identify timeline and milestones
- Discuss change management
- Consider those who will be affected internal and external
- Consider the user always
- Consider revisions

Budget:
- One-time costs (building and associated costs)
- Recurring costs
  - Staff
  - Technology, hardware, software
- Operational budget
  - separate line budget
  - normal operational budget
- Collaborative funding or single unit?
  - Is there a formula for cost sharing?
  - What does it cover?
  - Expect the unexpected

- What does the budget include?
  - Staff, hardware, software, paper, maintenance, cleaning, replacement fund, resources, office supplies, cleaning supplies, furniture repairs, additional service support e.g. washroom cleaning, security, recycling
  - Who is responsible for making the decisions?
  - Charge for printing? Revenue disbursement?

Service considerations
- Service model and philosophy
- Integration strategies with partners
- Governance and management
- Staffing requirements and training
- Hours of operation
- Access and security considerations

Identify your services
- Library based
- IT based, e.g. Ethernet, wireless
- Integrated or separate services
- Who can access them?
- One desk or more?
- How will you provide them? Staff?
- Hours of service?
- Adding new services? What? When?
- Supplies for the user – for use or sale

Hardware – purchase or lease
- PC, Mac Printer, Photocopier, Scanners, Media and more
- Warranty
- Service contracts/needs
- Plan for replacement/upgrades – budget and timing
- Campus technical infrastructure

Software
- Download decisions
- Frequency of updates
- Requests for additional software

Staffing

- Will depend on the IC model planned
- Library and IT Professionals
- Student Assistants
- Multi-skilled staff – cross-training
- Pay scales
- Staff turnover

- Who works there? When? Who do they report to?
- What is the working relationship?
- Team development?
- Who is in charge? How are decisions made?
- Job descriptions?
- Salaries?
- New types of jobs? Coordinate with HR?

Training

- What are your expectations of the staff and visa versa?
- Technical?
- Reference?
- Customer service training – transformational experience
- To open the door and ongoing?
- Face to face and/or virtual

Policies to consider
- Cell phones
- Food and drink
- Noise tolerance
- Computer use
- Access to special services/facilities eg workrooms, classrooms
- Unattended workstations
- Booking computers
- Access to hardware and resources – campus and/or community
    - Authentication

Instruction
- Instruction – technical and information literacy
- Tutoring
- Face to face – formal, informal
- Virtual instruction, manuals,
- Fees
- Who? When?

Statistics

- Keep track of the numbers – types of questions and service demands, numbers of users
- Elements of service – identify the new events e.g. printing, demands on facilities
- Hourly? Daily? , etc.
- Identify patterns of use

Marketing and communication
- Marketing plan
- Outline methods of communicating service (web, email, brochures)
- Ongoing communication plan (reports, meetings)
- Ongoing assessment of operation, goals, mission

Communication Plan

- Whose awareness and support is required?
- Communication styles –best ways to communicate to target groups
- Consider external and internal communication
- Timelines and responsibilities
- Content
- Updates
- Record keeping
- Flexibility
- Key communicator role

Collaboration/Partnership Agreements
- Identify need for agreements
- Develop agreements, including problem resolution process
- Integrate into partners' strategic plans and planning process

Pre-Opening Analysis
- Basic components in place
- Hardware, software, networks etc. operational
- Training completed
- Staff from collaborating departments aware of new service
- Client and IT support in place

Opening
- Timing of opening
- Marketing
- Role of key faculty in launch and promotion
- Demonstrations, examples of service

Evaluation

- How do you know that you have met your goals?
- Do you have standards of service?
- What do your users expect and what do they get?
- Your funders will want to know about the effectiveness
- Who needs to know? – staff, users, academy, community

Hints for great outcome:
- Establish effective communication channels between all involved
- Document all recommendations, requests and decisions carefully
- Utilise the experience and expertise obtained by others and ask for 2nd, 3rd even 4th opinions on the design, concepts, ideas and potential problems
- Build a level of trust, confidence and courage to allow stakeholders to come up with leading-edge ideas and creative solutions

PLANNING AN INFORMATION COMMONS: ACTION PLAN

- Rationale for an Information Commons. Why is it needed?

- Preliminary purpose and vision for an Information Commons in your university

- Potential locations and availability of space

- Partners needed to realise the vision

- Funding needed and potential sources

- Timeline, including target completion date

- Marketing strategies for the new Information Commons

- Anticipated outcomes and success measures for the Information Commons

- Mechanism(s) for continual evaluation and renewal of the Information Commons

Suggested readings:

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