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<th><strong>Title</strong></th>
<th>Planning in a dynamic library</th>
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<tr>
<td><strong>Author(s)</strong></td>
<td>Sidorko, PE; Ferguson, AW</td>
</tr>
<tr>
<td><strong>Citation</strong></td>
<td>The 7th Annual Library Leadership Institute, Shenzhen, China, 8-12 May 2009.</td>
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<td><strong>Issued Date</strong></td>
<td>2009</td>
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<td><strong>URL</strong></td>
<td><a href="http://hdl.handle.net/10722/63624">http://hdl.handle.net/10722/63624</a></td>
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<tr>
<td><strong>Rights</strong></td>
<td>This work is licensed under a Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License.</td>
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Topic 1: Planning in a Dynamic Library

第一讲：动态图书馆之规划

The HKU Experience

香港大学的经验

Peter Sidorko and Tony Ferguson

May 9, 2009
“Plans are of little importance, but planning is essential”

Winston Churchill
Planning
计划

- Planning is the conscious predetermination of courses of action.
  计划是有意识的预定行动方案
- Making things happen that may not have.
  使可能不会发生的事情发生
- Attempting to control the future.
  尝试控制未来
- The function of everybody in the library.
  图书馆所有人的职能
- A process of logical decision making
  合逻辑的决策过程
Planning for 各方面的计划

- Direction 方向
- Consistency 一致性
- Innovation 创新
- Action 行动

- Efficiency 效率
- Performance 绩效
- Evaluation 评估
- Change 转变
Scenario planning
情景规划

“…is a discipline for rediscovering the original entrepreneurial power of *creative foresight* in contexts of accelerated change, greater complexity, and genuine uncertainty.”

「……是一门学问，用以重新发现企业家本有的在转变加速，复杂性增加，而且实在是变化无常的情况下创造远见的能力。」

- Pierre Wack, Royal Dutch/Shell, 1984
Scenario planning

- Envisioning a library future
  展望图书馆的未来
- Choosing alternatives
  选择其他方法
- Creating a path to a preferred future
  为所追求的未来创出道路

“… the librarian of the future . . . will be expected to be quite a versatile creature . . . able to imagine futures and work towards them.”
「 ……未来的图书馆员……将会是相当多才多艺的人才……具有预测及迈向未来的能力。」

Strategic planning is a model of planning that places greater emphasis on creativity, innovation and intuition, where events are anticipated rather than reacted to.

策略规划是一个更侧重于创造、创新和直觉的计划模式，在此过程中，我们会对事情作出预测而不是作出反应。
Environmental scanning
环境扫描

- Libraries operate in unique environments
  图书馆在独特的环境中运作
- These affect the way a library performs, the services it provides and the markets in which they operate.
  这些环境会影响图书馆的表现、提供的服务及其运作的市场
- As these evolve, their impact will vary over time.
  由于环境的演变，其影响将随时间而变
- Therefore, it is necessary to scan the environment regularly.
  因此，我们需要定期地对环境作出分析
Strategic planning steps

- Establish the ground rules (participation, task force, timeline, etc)
- Develop mission statement
- Conduct an environmental analysis (eg, PETS)
- Resource analysis (strengths, weaknesses - SWOT)
- Identify strategic issues (library’s future)
- Define future strategies (where library is going)
- Decide on programs (how to get there – projects)
- Implement and plan to evaluate (success?)
### Environmental scans: HKUL Brainstorming

#### 环境扫瞄：港大图书馆的集思

<table>
<thead>
<tr>
<th>Year</th>
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<th>“Just do its” or “Don’t do its”</th>
<th>Accepted into Strategic Plan</th>
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<td>2002-2005</td>
<td>215</td>
<td>179</td>
<td>36</td>
</tr>
<tr>
<td>2006/07</td>
<td>266</td>
<td>239</td>
<td>27</td>
</tr>
<tr>
<td>2007/08</td>
<td>240</td>
<td>225</td>
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<tr>
<td>2008/09</td>
<td>171</td>
<td>152</td>
<td>19</td>
</tr>
</tbody>
</table>
How to do a library environmental scan

图书馆怎样做环境扫瞄

- Find someone else who has done it (eg, OCLC)
  找一个曾做过环境扫瞄机构 (例如：OCLC)
- Maintain awareness of professional developments
  保持对专业发展的认识
- Maintain political awareness (local and beyond)
  保持政治觉知性（本地及以外的）
- Attend conferences, courses, seminars etc
  参加会议、课程、研讨会等
- Talk to colleagues
  与同事讨论
- Read lots
  多阅读
- Look at what the competition is doing – borrow liberally.
  看看竞争环境 – 开放地借鉴
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<th>HKUL Staff activity</th>
<th>02-03</th>
<th>03-04</th>
<th>04-05</th>
<th>05-06</th>
<th>06-07</th>
<th>07-08</th>
<th>08-09 (so far)</th>
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<td>International conference</td>
<td>26</td>
<td>27</td>
<td>27</td>
<td>19</td>
<td>20</td>
<td>39</td>
<td>40</td>
</tr>
<tr>
<td>Local conference</td>
<td>7</td>
<td>3</td>
<td>28</td>
<td>49</td>
<td>33</td>
<td>85</td>
<td>29</td>
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<tr>
<td>HKUL conference</td>
<td>0</td>
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<td>0</td>
<td>13</td>
<td>25</td>
<td>0</td>
<td>52</td>
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<tr>
<td>HKUL Leadership Institute</td>
<td>12</td>
<td>15</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>6</td>
<td>6</td>
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<tr>
<td>Courses (degree/diploma etc.)</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>Courses – informal (in-house training etc.)</td>
<td>216</td>
<td>79</td>
<td>124</td>
<td>137</td>
<td>286</td>
<td>608</td>
<td>407</td>
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<tr>
<td><strong>TOTAL 总计</strong></td>
<td><strong>261</strong></td>
<td><strong>135</strong></td>
<td><strong>189</strong></td>
<td><strong>229</strong></td>
<td><strong>373</strong></td>
<td><strong>744</strong></td>
<td><strong>547</strong></td>
</tr>
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</table>
2003 OCLC Environmental Scan: Pattern Recognition

2003 OCLC 的环境透视：认清前景趋势

“provides a high-level view of the information landscape, intended both to inform and stimulate discussion about future strategic directions”

「就信息状况发表深入的见解，以期让读者了解未来策略的方向并激发这方面的讨论」

• Research & learning (Political) landscape
研究和教学〈政治〉状况
• Social landscape
社会状况
• Economic landscape
经济状况
• Technology landscape
技术状况

http://www.oclc.org/reports/escan/
“seeks to identify and describe emerging technologies likely to have a large impact on teaching, learning, or creative expression within higher education.”

「力求找出及描述有可能为高等教育方面的教学或创意表达带来重大影响的新兴科技」
Key trends: 2007
主要趋势：2007

- User-Created Content
  用户制作内容
- Social Networking
  社交网络
- Mobile Phones
  手提电话
- Virtual Worlds
  虚拟世界
- The New Scholarship and Emerging Forms of Publication
  新学术及新兴的出版方式
- Massively Multiplayer Educational Gaming
  大型多用户教育游戏

http://www.nmc.org/horizon/
Globalization affect the way we work, collaborate, and communicate.
全球化会影响我们工作、合作及沟通的方式

Collective intelligence.
群体智慧

Games as learning tools.
以游戏作学习工具

Visualization tools making information more meaningful.
可视化工具令信息更有意义

Mobile phones unprecedented innovation, driven by global competition.
在全球竞争驱动下产生的前所未有的手提电话创新科技

http://www.nmc.org/horizon/
Critical challenges

重要挑戰

- Growing need for formal instruction in key new skills, including information literacy, visual literacy, and technological literacy.
  在新技术上，正规指导的需要增加，包括信息素养、视觉素养及科技素养
- Students are different, educational material is not.
  学生是不同了，但教育材料并无不同
- Significant shifts in scholarship and research, and there is a need for innovation and leadership at all levels of the academy.
  学术及研究上有显著变动，而且在学术的所有层面均有创新及提高领导力的需要
- Need to measure and prove through formal assessment that our students are learning.
  有需要通过正式地评估学生所学作量度及证明
- Growing expectation to make use of and to deliver services, content, and media to mobile devices.
  将服务、内容及媒体传送到流动装置以便利用的期望正在增加

http://www.nmc.org/horizon/
Scholarly Information Practices in the Online Environment

网络环境的学术信息实务

- Reports on “the state of knowledge on scholarly information behavior”
  「学术信息行为上的知识状态」报告
- “And how they differ among disciplines”
  「在不同的范畴中有何差异」
- Identifies “directions and … priorities for development of digital information services”
  找出「方向及……数字信息服务发展的优次序」

http://www.nmc.org/horizon/
The five core scholarly activities and their primitives

五种核心学术活动及他们的本体

1. Searching  搜寻
   1.1 Direct searching  直接搜寻
   1.2 Chaining  链接
   1.3 Browsing  浏览
   1.4 Probing  探针
   1.5 Accessing  存取

2. Collecting  收集
   2.1 Gathering  搜集
   2.2 Organizing  组织

3. Reading  阅读
   3.1 Scanning  扫描
   3.2 Assessing  评估
   3.3 Rereading  再读

4. Writing  写作
   4.1 Assembling  汇编
   4.2 Co-authoring  合作
   4.3 Disseminating  宣传

5. Collaborating  合作
   5.1 Coordinating  协调
   5.2 Networking  网络
   5.3 Consulting  顾问

6. Cross-cutting Primitives
   6.1 Monitoring  监控
   6.2 Notetaking  笔记
   6.3 Translating  翻译
   6.4 Data Practices  资料实务

http://www.nmc.org/horizon/
Strategic planning elements

Actions, change & innovation

Objectives

Goals

Vision

Mission

http://www.nmc.org/horizon/
The HKUL experience

香港大学图书馆的经验
HKUL Annual Planning Cycle
香港大学图书馆年度规划周期

1. Environmental Scanning
Brainstorming For New Objectives (PETS, SWOT)
环境扫描，集思产生新的目标 (政治、经济、技术及社会文化，强弱机危)

2. Analysis & Selection of Objectives
分析及选择目标

3. Establishing Project Teams, Outcomes, Timelines, Budgets
设立项目小组、成果、时间表、经费预算

4. Investigations
研究

5. Recommendations
建议

6. Implementation & Service Modification
实行及完善服务

7. Evaluation & Reporting
评估及报告

http://www.nmc.org/horizon/
Successful planning outcomes at HKUL

香港大学图书馆的成功规划成果
Collaboration through user-initiated resource sharing
面向用户的资源共享方面的合作

HKALL (港書網), Hong Kong Academic Library Link (香港高校圖書聯網), is a project in accelerated resource sharing jointly undertaken by the academic libraries of eight local tertiary institutions, listed in the left sidebar.

Implemented in INN-Reach software from Innovative Interfaces and running on a Sun server housed at the University of Hong Kong Libraries, HKALL is a union catalogue allowing the students and staff of the eight partner institutions to search a mega collection of over 5 million titles of monographs held in the eight participating libraries. They can make direct requests on these materials, and have the materials delivered to the libraries of their respective institutions for further checkout. In cases where printed materials cannot be sent via HKALL, current students and staff may be able to go to that library personally to use the item in question. Go to your circulation desk for further details. The map links on the left hand side of this page are provided to help you get to these libraries. Although similar projects exist in other parts of the world, HKALL is the first to include a large number of Chinese vernacular items.

Find out more about HKALL

Each of the eight libraries has specific rules and procedures for HKALL. Please refer to the following web pages for further details.

HKALL at The Chinese University of Hong Kong
HKALL at City University
HKALL at Hong Kong Baptist University
HKALL at The Hong Kong Institute of Education
HKALL at The Hong Kong Polytechnic University
HKALL at The Hong Kong University of Science and Technology
HKALL at Lingnan University
HKALL at The University of Hong Kong
RFID and self check

无线射频识别及自动借还
The HKU Scholars Hub is the institutional repository of The University of Hong Kong. It seeks to collect the intellectual output of HKU and make it available to the widest possible audience. Records are made in the Hub for items that are fulltext open access, or for URLs that hyperlink to the same.

Quick search of The Hub

Search the author, title, abstract and series fields.

Search

For phrase search, please use quotation marks, for example, "Wann, John", or "Behavior Therapy".

Nanotechnology is big at HKU engineering, physics and medicine.
About HKUL through Wiki: Knowledge Bank

维基上的香港大学图书馆：知识银行
The librarian, the scholar, and the future of the research library / Eldred Smith
Smith, Eldred R.
AVAILABLE - Main Circ Counter - X 027.7 S64

Books in our future : a report from the Librarian of Congress to the Congress
Library of Congress
LIB USE ONLY - Main Ref Pamphlet - RP 028.90973 L69

Mercantile Library, New York City, Aug. 20, 1862
[economic resource] : Dear Sir: In view of the mighty influence of the present war on the future history of the human race, it would seem a duty we owe to posterity to leave them as perfect a record as possible of not only the actions but the motives and spirit of the times. In my capacity of librarian so many of the various publications on the subject have been brought before me, that the
Enhancing the traditional catalogue

<table>
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LCCN          89025665
OCLC #        ocm20671859
DESCRIPT.     119 p.; 22 cm.
SERIES        Contributions in librarianship and information science.
BIBLIOG.      Includes bibliographical references (p. 106-115) and index.
LC SUBJECT     Research libraries.
Libraries and scholars.
Library science -- Forecasting.
Show similar items
Library science -- Technological innovations.
Show similar items
Managing campus plagiarism software

What is Turnitin?

Turnitin offers Originality Checking which allows checking of students' work for proper citation or potential plagiarism. Once a paper is submitted to Turnitin, it will compare with documents in a continuously updated database consisting of:

2. Over 70 million student papers worldwide.
3. Collections of newspapers, magazines, scholarly journals, e-Books and e-Texts.

Turnitin at HKU

Turnitin subscription at HKU has been made under the recommendation of the Knowledge Team, an action group devoted to helping HKU make better informed decisions and develop better strategies for using ICT to enhance teaching and learning. Since its subscription in September 2004, usage of the software has gained wider adoption within the University community. Periodic reviews have been conducted as regards the usefulness and effectiveness of Turnitin in the support of teaching and learning. As in previous surveys, the June 2007 survey results revealed favourable feedback from instructors. Most respondents indicated that they will use Turnitin in the future and would recommend it to other colleagues. Though respondents noted the limitations of the Turnitin matching sources, they also acknowledged the usefulness of the software in assisting them to spot potential cases of plagiarism.

Want to use Turnitin?

Faculty members wishing to set up a Turnitin account can send us an email with full name, Department, telephone number and a HKU email address. Postgraduate students who would like to check their theses against Turnitin should contact their supervisor for submission.
Meeting our users at their places

到用户中去
Keeping in touch: Blogging

Services
Collection Development

Education Library New Opening Hours
Published by Education Library under Education
Tags: Education Library, opening hours
To provide better services for users, the Education Library will extend its opening hours starting from 14 April 2009.
The new term-time opening hours will be as follows:
Monday-Friday 10 am to 9 pm
Saturday 10 am to 6 pm
Sunday Closed
The extension of opening hours, in response to student demand, will be on trial during exam period. We will monitor usage and review the needs for 2009-10.
For enquiries, please call 2859-2205 or email adulib@lib.hku.hk

Price of school textbooks increases
Published by Education Library under Education
Tags: school textbooks
The cost of textbooks under the new senior academic structure has risen. Compulsory Form Four
e-Video and student competition

电子录像及学生比赛
Other initiatives from planning

由规划产生的其他项目

- Internal customer service training modules
  内部顾客服务培训模式
- Electronic fees payment
  电子收费
- Subject librarians’ extension service
  学科馆员扩展服务
- Marketing plan for greater library usage
  增加图书馆用量的推广计划
- The HKUL Annual Leadership Institute
  香港大学图书馆领导研修班
- Establish learning commons in all libraries
  在所有图书馆设立多元学习空间
- Faculty book delivery service
  学系送书服务
More initiatives from planning

- Take a leading role in the HK Memory Project
  香港回忆项目的领导角色
- Explore how we might share original Chinese cataloguing
  探索如何共享中文数据编目
- Initiate exchange programs with North American and British libraries
  与北美及英国图书馆的交换计划
- Develop a volunteers’ program to involve members of the community
  设立自愿计划以融纳社区人士参与服务
- Many, many more…
  源源不絕的创新……
Finally:
Planning is about change, improvement and Survival

结语：
规划与转变、进步和生存息息相关。
To improve is to change; to be perfect is to change often

要进步就必须求变；
要完美则更须不断求变

Winston Churchill

Thank you
谢谢！