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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



The 7th Annual Library Leadership Institute

21st Century Challenges for Library Leaders: Technology, Planning and
Organizational Change

Shenzhen, China. 8-12 May 2009.



“Plans are of little importance, but ***planning is essential***”

「纸上谈兵是没用的，只有开始行动才是最重要的」

Winston Churchill

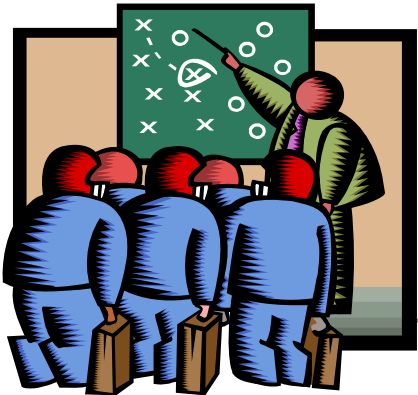
Planning

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

➤ http://www.juergendaum.com/news/09_08_2001.htm

Scenario planning

情景规划

- 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。」

➤ Feret, B and Marcinek, M. (1999), The Future of the Academic Library and the Academic Librarian: a Delphi study. *Librarian Career Development*, 7(10), p91-107.

Strategic planning

策略规划

- 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，我们需定期地对环境作出分析

The Scholarship Environment

学术环境

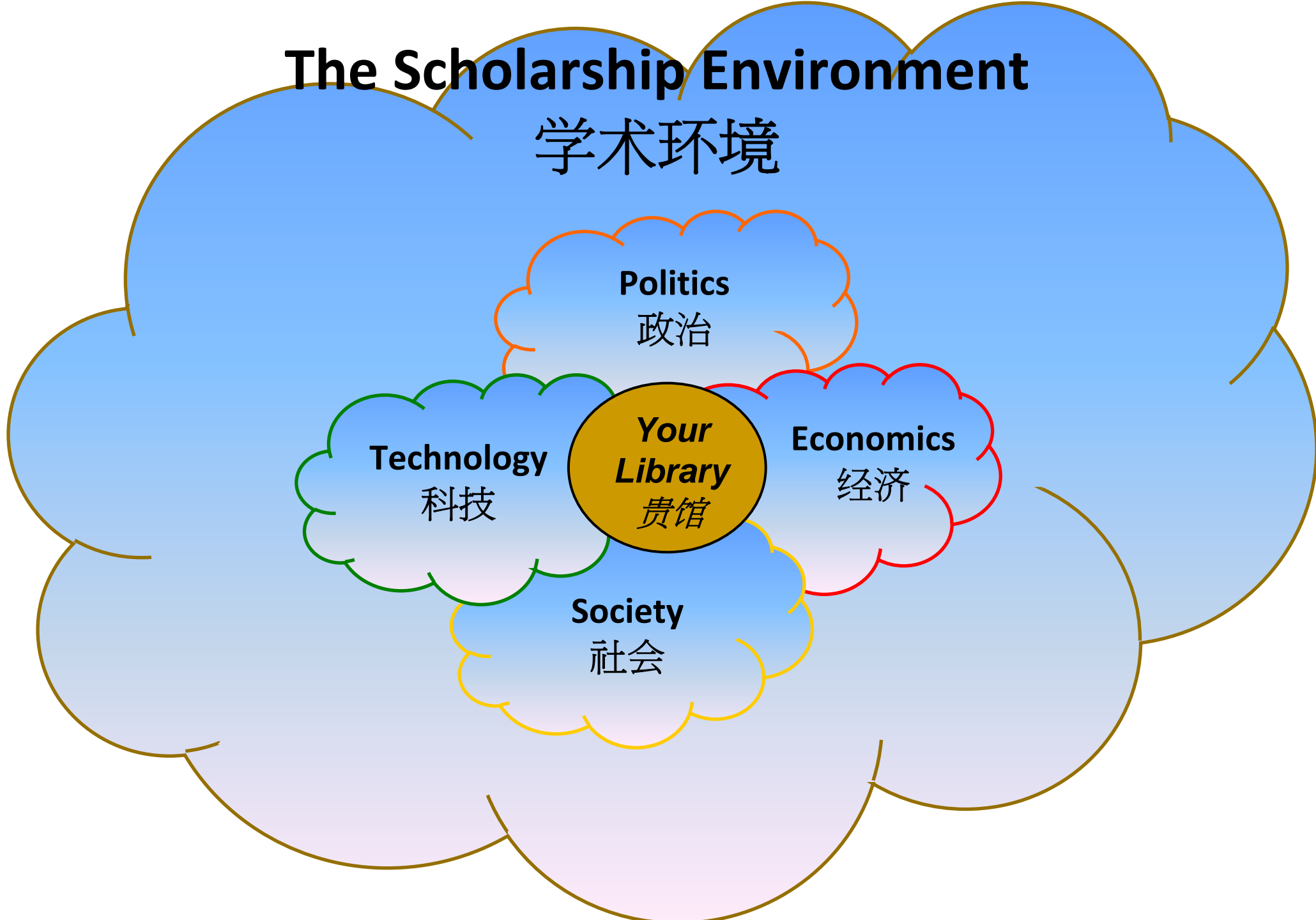
Politics
政治

Technology
科技

*Your
Library*
贵馆

Economics
经济

Society
社会



Strategic planning steps

策略规划步骤

- Establish the ground rules (participation, task force, timeline, etc)
基本规则 (参与、工作小组、进度表等等)
 - Develop mission statement
立下使命宣言
 - Conduct an environmental analysis (eg, PETS)
进行环境分析 (例如：政治、经济、技术及社会文化)
 - Resource analysis (strengths, weaknesses - SWOT)
资源分析 (优劣机危)
 - Identify strategic issues (library's future)
找出策略议题 (图书馆的未来)
 - Define future strategies (where library is going)
定出未来策略 (图书馆往哪走?)
 - Decide on programs (how to get there – projects)
定出方案 (如何到达那裏 — 各项计划)
 - Implement and plan to evaluate (success?)
实行和计划评估 (成功与否?)
-

Environmental scans: HKUL Brainstorming

环境扫描：港大图书馆的集思

| Year 年度 | Number of ideas generated 构思项目总数 | “Just do its” or “Don’t do its” “尽管去做” 或 “不要做” | Accepted into Strategic Plan 纳入策略计划 |
|-------------------|--|--|---|
| 2002-2005 | 215 | 179 | 36 |
| 2006/07 | 266 | 239 | 27 |
| 2007/08 | 240 | 225 | 15 |
| 2008/09 | 171 | 152 | 19 |

How to do a library environmental scan

图书馆怎样做环境扫描

- Find someone else who has done it (eg, OCLC)
找一个曾做过环境扫描机构 (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
-

| HKUL Staff activity 港大职员活动 | 02-03 | 03-04 | 04-05 | 05-06 | 06-07 | 07-08 | 08-09 (so far) |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------------------|
| International conference 国际会议 | 26 | 27 | 27 | 19 | 20 | 39 | 40 |
| Local conference 本地会议 | 7 | 3 | 28 | 49 | 33 | 85 | 29 |
| HKUL conference 港大图书馆会议 | 0 | 9 | 0 | 13 | 25 | 0 | 52 |
| HKUL Leadership Institute 港大图书馆领导研修班 | 12 | 15 | 9 | 8 | 8 | 6 | 6 |
| Courses (degree/diploma etc.) 课程 – 正式 学位/文凭等) | 0 | 2 | 1 | 3 | 1 | 6 | 13 |
| Courses – informal (in-house training etc.) 课程 – 非正式内部培训等) | 216 | 79 | 124 | 137 | 286 | 608 | 407 |
| TOTAL 总计 | 261 | 135 | 189 | 229 | 373 | 744 | 547 |

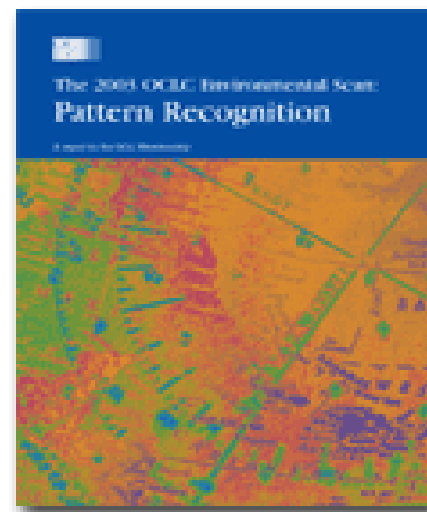
2003 OCLC Environmental Scan: Pattern Recognition

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”

「就信息状况發表深入的見解，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

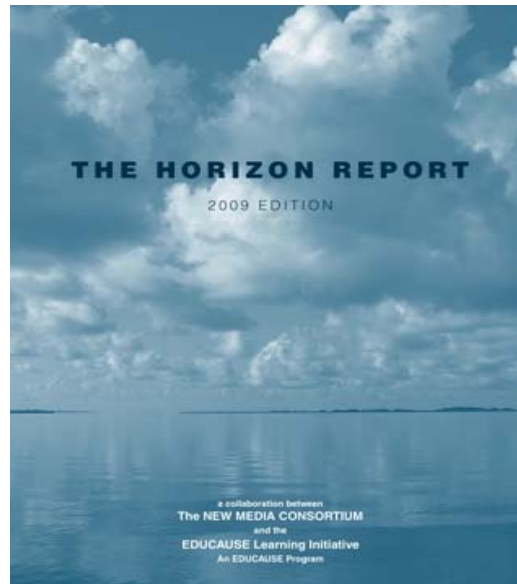


The Horizon Report

(NMC & EDUCAUSE)

“seeks to identify and describe emerging technologies likely to have a large impact on teaching, learning, or creative expression within higher education.”

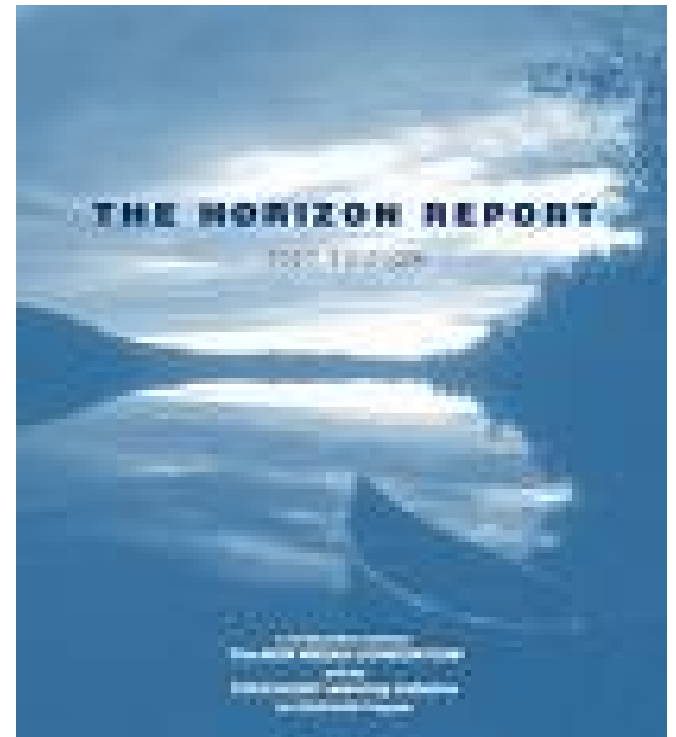
「力求找出及描述有可能为高等教育方面的教学或创意表达带来重大影响的新兴科技」



Key trends: 2007

主要趋势：2007

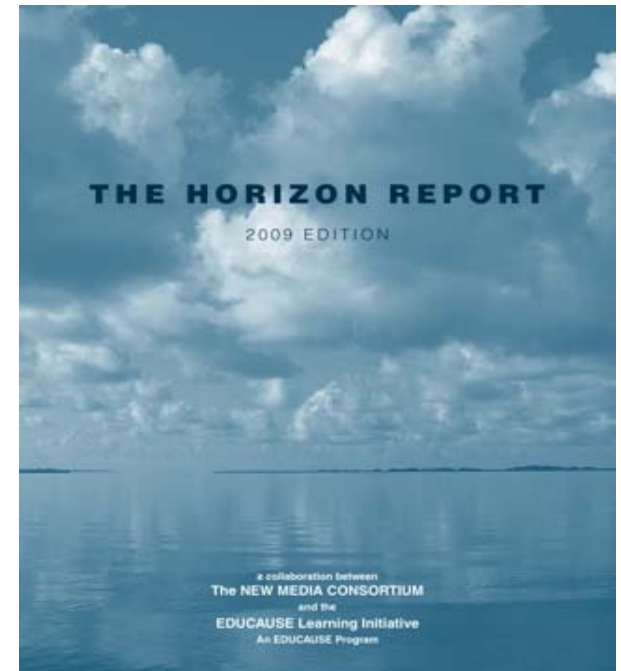
- User-Created Content
用户制作内容
- Social Networking
社交网络
- Mobile Phones
手提电话
- Virtual Worlds
虚拟世界
- The New Scholarship and Emerging
Forms of Publication
新学术及新兴的出版方式
- Massively Multiplayer Educational
Gaming
大型多用户教育游戏



Key trends: 2007

主要趋势：2007

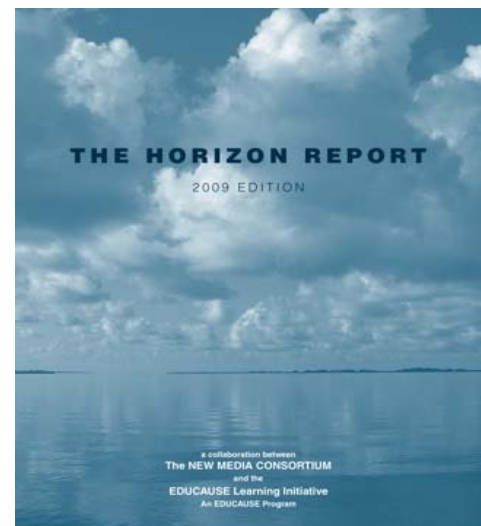
- Globalization affect the way we work, collaborate, and communicate.
全球化会影响我们工作、合作及沟通的方式
- Collective intelligence.
群体智慧
- Games as learning tools.
以游戏作学习工具
- Visualization tools making information more meaningful.
可视化工具令信息更有意义
- Mobile phones unprecedented innovation, driven by global competition.
在全球竞争驱动下产生的前所未有的手提电话创新科技



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



Scholarly Information Practices in the Online Environment

网络环境的学术信息实务

Scholarly Information Practices in
the Online Environment
Themes from the Literature and Implications
for Library Service Development

Carole L. Palmer
Lauren C. Teffeu
Carrie M. Pirmann

Graduate School of Library & Information Science (GSLIS)
Center for Informatics Research in Science & Scholarship (CIRSS)
University of Illinois at Urbana-Champaign



A publication of OCLC Research

- 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」

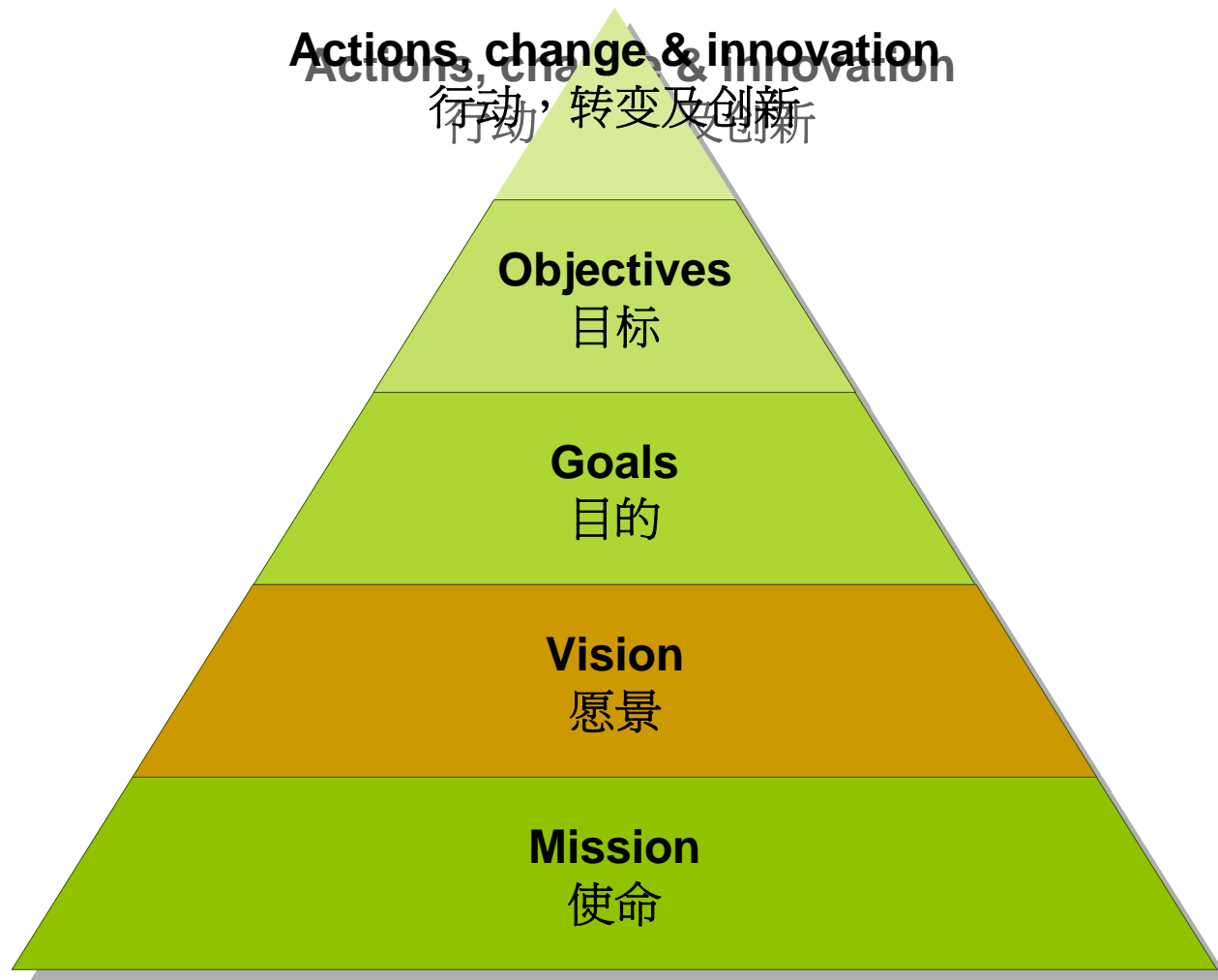
The five core scholarly activities and their primitives

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 剪接原稿
 - 6.1 Monitoring 监控
 - 6.2 Notetaking 笔记
 - 6.3 Translating 翻译
 - 6.4 Data Practices 资料实务

Strategic planning elements

策略规划的元素





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



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

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](#)

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City University of Hong Kong

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Hong Kong Baptist University

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The Hong Kong Institute of Education

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The Hong Kong Polytechnic University

[map](#)



The Hong Kong University of Science and Technology

[map1](#) [map2](#)



Lingnan University

[map](#)



The University of Hong Kong

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Rare Book Digitisation Project

珍本书数字化项目

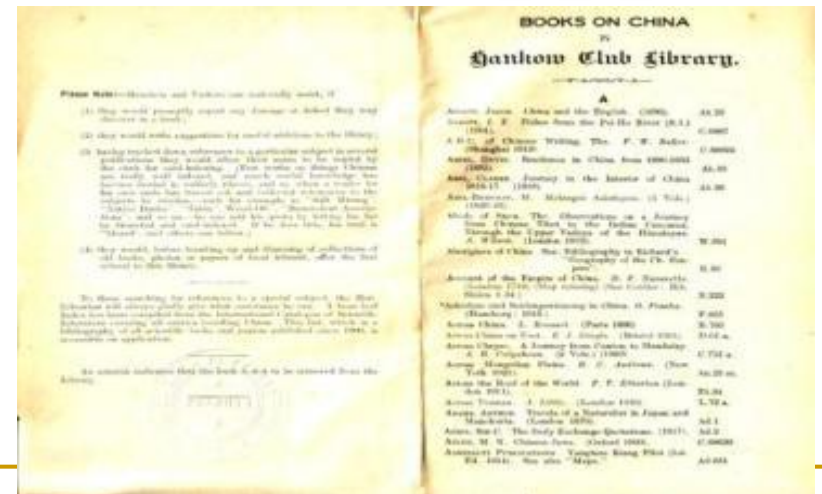
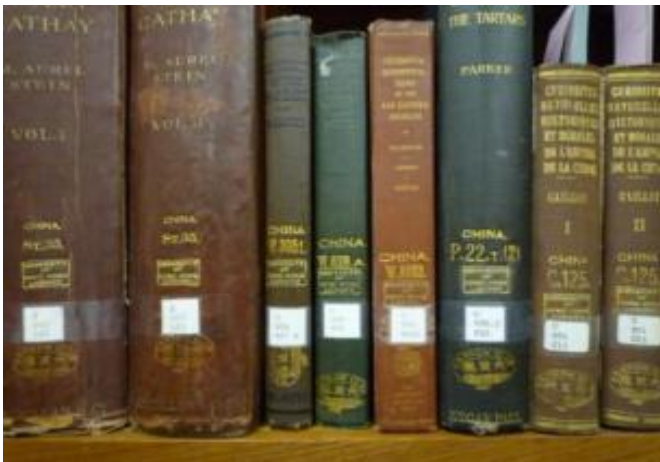


AKBAR'S TOMB.—SECUNDERA.

AKBAR'S TOMB.

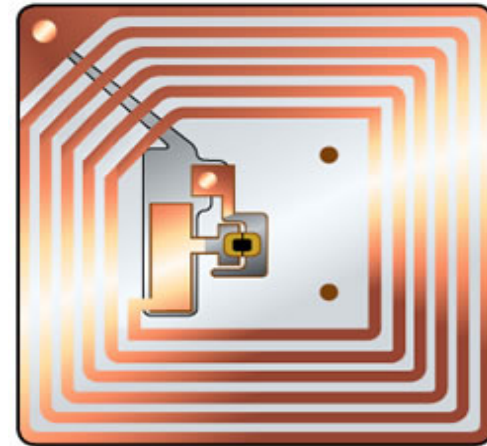
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Kirtas APT 2400



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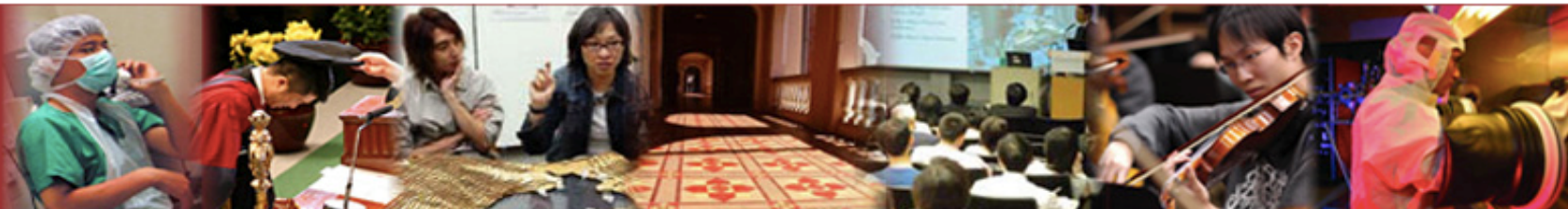
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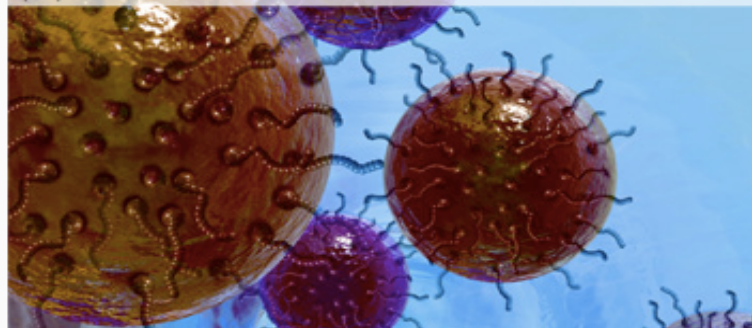
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Nanotechnology is big at HKU engineering, physics and medicine.



Quick search of The Hub

Search the author, title, abstract and series fields.

Search

Search

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

Relevant Links

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Featured Scholar



An interview on Open Access publishing with HKU Scholar Dr Brad McPherson, Speech and Hearing, Faculty of Education.

About HKUL through Wiki: Knowledge Bank

维基上的香港大学图书馆：知识银行



special

HKUL > Knowledge Wiki

All articles

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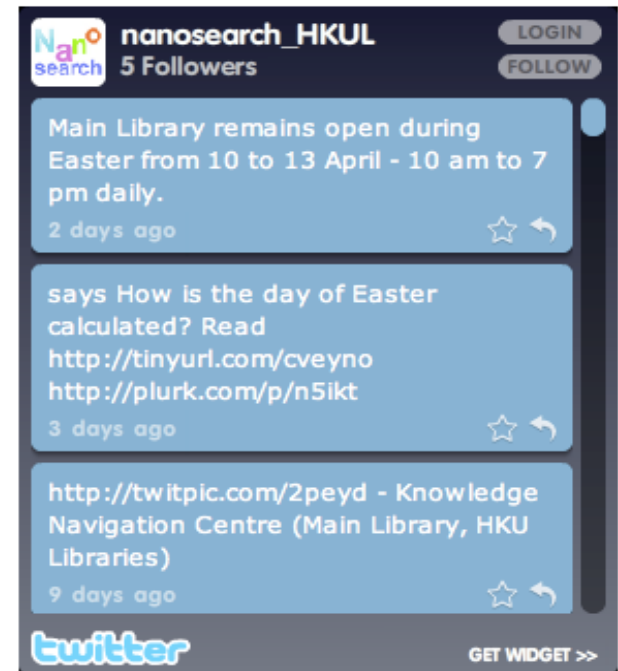


Ask a Librarian

HKU Libraries

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- **Telephone Reference Service:** Call us at 2859-2203
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nanosearch_HKUL
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Main Library remains open during Easter from 10 to 13 April - 10 am to 7 pm daily.
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says How is the day of Easter calculated? Read
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<http://plurk.com/p/n5ikt>
3 days ago

<http://twitpic.com/2peyd> - Knowledge Navigation Centre (Main Library, HKU Libraries)
9 days ago

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Next generation library catalogue: Dragon 2.0

下一代的图书馆目录：Dragon 2.0

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|  | <p>The librarian, the scholar, and the future of the research library / Eldred Smith Smith, Eldred R.</p> <p>AVAILABLE - Main Circ Counter - X 027.7 S64</p> | 1990 |
| | <p>Books in our future : a report from the Librarian of Congress to the Congress Library of Congress.</p> <p>LIB USE ONLY - Main Ref Pamphlet - RP 028.90973 L69</p> | 1984 |
| | <p>Mercantile Library, New York City, Aug. 20, 1862 [electronic 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</p> | 1862 |

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Enhancing the traditional catalogue

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IMPRINT New York : Greenwood Press, 1990.
Permanent URL for this record => <http://library.hku.hk/record=b1285937>

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Managing campus plagiarism software

管理校园抄袭行为的软件



Home
Faculty
Students
About Plagiarism
Citation Styles

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:

1. Current and archived web pages.
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 returns 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

facebook

Remember Me

[Forgot your password?](#)

Email

Password

Facebook helps you connect and share with the people in your life.

 **HKU Libraries**

[Browse More Applications](#)


**The University of Hong Kong
Libraries**
Caring Collaborative Creative
Your partner in intellectual excellence



Sign up to use this application and connect with your friends.

About this Application

Users:
112 monthly active users

Category:
Education

This application was **not** developed by Facebook.

About HKU Libraries

The University of Hong Kong Libraries seeks to sustain and enhance the University's excellence as an institution of higher learning, as a pre-eminent international university in Asia, and to provide outstanding teaching and world-class research support collections and services so as to produce well-

Welcome to the HKU Libraries Facebook application.

This application was created to provide users with access to the University of Hong Kong Libraries and its resources within Facebook.

Some of the resources include:

- Searching the HKU Libraries and HKALL Catalogues
- Finding Articles
- Viewing news feeds

Facebook is providing links to these applications as a courtesy, and makes no representations regarding the applications or any information related to them. Any questions regarding an application should be directed to the developer.

▼ Discussion Board

Displaying 2 discussion topics

[See All](#)

your comments?

2 posts by 2 people. Updated on November 1, 2008 at 7:12pm

三聚氰胺与三聚氰酸狼狽为奸才能发挥作

Keeping in touch: Blogging

保持联系：部落格

Services

Collection Development

Search:

April 2009

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| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |

[« Mar](#)

CATEGORIES

- All
- Architecture
- Arts
- Business & Economics
- Dentistry
- Education
- Electronic Resources
- Engineering
- Internet Resources
- Law
- Medicine
- Music
- Science
- Social Sciences
- Uncategorized

Education Library New Opening Hours

Apr
09
2009

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 edulib@lib.hku.hk

[+ BOOKMARK](#) [■](#) [□](#) [☰](#) [☷](#) [...](#)

[No responses yet](#) | 28 views

Price of school textbooks increases

Apr
09
2009

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



HKUL > AV & Reserve Collection > eVideo

Welcome to HKUL AV Sidorko Peter E...! Logout

eVideo

Home

Videos

Categories

TV

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Now Playing

HKUL: World Class Collections and Services



From: avdept

Video Description: [\(More Info\)](#)

Script: The University of Hong Kong Libraries has a proud tradition of providing world class coll...

URL: Link to this video.

<http://evideo.lib.hku.hk/play/20000007>



MORE

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The challenges of creating world ...

Rating: 0

Views: 7



The Microcosmos of HKUL

Rating: 0

Views: 25



Dialogue with Warren Mok: My

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

更多由规划产生的项目

- 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！