

## **An Information Literacy Strategic Project implementation at Universidade Nova de Lisboa: Case Presentation**

PRATES, MARIA MANUELA<sup>1</sup> ; ANDRADE, ISABEL<sup>2</sup>

<sup>1</sup> Faculty of Medical Sciences (New University of Lisbon), Lisbon, Portugal

<sup>2</sup> National School of Public Health (New University of Lisbon), Lisbon, Portugal.

### **AIM**

#### *Of the communication*

The aim of this communication is to present the Universidade Nova de Lisboa (or Nova) Information Literacy (IL) strategic project – as it developed by the time of EAHIL 2010 Conference - to illustrate an ongoing case of strategic implementation approach throughout an entire university.

The Authors believe that in spite of specific cultural differences, case experiences may be generalized to other contexts.

#### *Of the project*

Top leadership at Nova, namely the Rector, early recognized that a Strategic Project on IL initially proposed (2008) by university librarians, could facilitate new transversal practices to Nova. Indeed Nova has been acknowledged since long as a university with a tradition of quite independent academic units (AU).

For the same purpose the Rector also decided that the project should benefit from sounded recognized academic expertise, through an external consultant he asked librarians to suggest.

Therefore, the main strategic aims of the Project in the Nova context were: promoting horizontal cooperation among the Academic Units of Nova and bringing added competitive IL skills to its university members, namely students.

### **DESCRIPTION**

#### *Context*

Universidade Nova de Lisboa-New University of Lisbon (from now on mentioned as Nova) integrates nine Academic Units (AUs).

Main usual scientific areas are represented in those AUs, though by way of different organizational characteristics as well as educational and research profiles:

Chemical and Biological Technology (an Institute); Hygiene and Tropical Medicine (an Institute); Law (a Faculty); Medical Sciences (a Faculty); Public Health (a National School); Sciences and Technology (a Faculty); Social Sciences and Humanities (a Faculty) and Statistics and Information Management (an Institute).

Each AU is managed with significant administrative and budgetary independence.

For instance, recent external evaluations undertaken upon Nova's own request, namely one by EUA (European University Association) pinpointed insufficient cooperation practices among Nova's AU, i.e. inside the university.

Also deriving from this context, nine libraries are operating at Nova, one per AU.

They all vary in general characteristics including budget and resources.

#### *Background*

Upon being elected as Rector, the former Dean of the Faculty of Medical Sciences called together at the Rectory all Head Librarians at Nova (November 14<sup>th</sup> 2007) thus for the first time starting a university agenda on the library sector (a longtime proposal from the librarians) by means of a new semi-formal Librarians Working Group (GTB).

Among several LIS questions of interest to the university that were raised by the GTB, as well as issues that received specific proposals from the librarians' on behalf of Nova, user education activities at the university libraries were also mentioned and later, upon the Rector's request, described on a GTB's Report on the subject.

The new awareness at Rectorate level of such user education practices undertaken by Nova's university libraries, led the Rector to ask for a formal presentation about this issue from the GTB to the university's Senate.

At this stage, librarians argued for a more advanced approach and suggested a presentation under the title "Information Literacy (IL) at Nova: a strategy for competitiveness" where the user education GTB's Report would be simply distributed to the Senate members, along with a seminal article of Sheffield's Professor Sheila Corral on the subject of the presentation.

This session took place at May 2008 and led to a next formal proposal of the GTB to the Rector, stressing the need to implement a top level strategic IL project at Nova.

This was later approved (by the Rector's initiative at a College of Deans' meeting) as a university project and with the external consultancy of Professor Sheila Corral.

### Project participants

As above referred the project developed from a Nova's head librarians' group (GTB) initiative and proposal that received the Rector sponsorship, to a formal university's project.

A Pro-Rector (responsible for Teaching Quality at Nova) later received the Rector's delegation to assure close top liaison to the project's development and functional structures.

This gradually spreading initiative, besides the Project's external expert, now involves all Nova's librarians, many teachers including those appointed by each university's Academic Units (AU) in support of two of the project's levels of intervention (strategic and tactical plus operational). Two other teachers with specific roles are working into the project's management organization as described below.

Current Project management structure can be illustrated as follows:

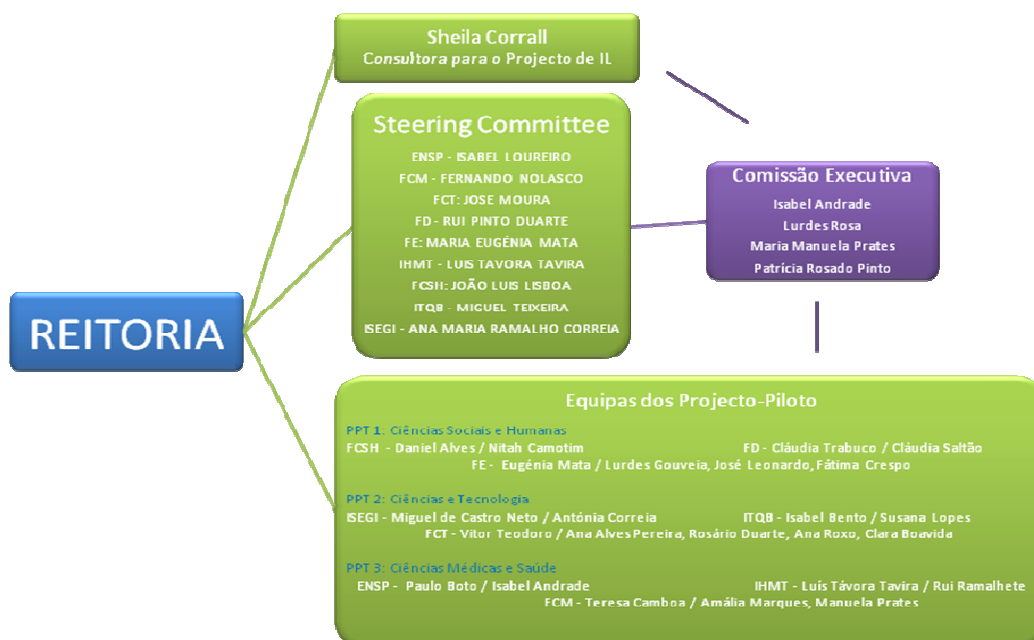


Figure 1 – Project organizational chart

Although the Steering Committee, and other later referred functional bodies, were suggested by the external consultant according to the intended top strategic approach, two elements must be highlighted here as initially unplanned:

- The Executive Committee, deriving from the need to assure many “day-to-day” needs both at operational and tactical levels such as: preparing progress, briefing and feed-backing the consultant, organizing meetings’ agenda and management, registering the minutes, contacting and debriefing partners mostly at operational levels, “connecting” participants, planning and accompanying the external consultant’s visits... An interesting feature of this group is the fact that, from the initial 2 interface librarians appointed by the GTB for the IL project, it happened to join together (starting on a spontaneous informal basis) representatives of other professional profiles partnering for the project: an academic pedagogical expert (teacher) and another teacher, the coordinator of Nova’s Master Course in Information and Documentation.
- Although unplanned a top strategic factor for this process became the College of Deans’ periodical meeting. This was the forum chosen by the Rector to disseminate the Project at university high level and simultaneously, whenever necessary, also used to “validate” decisions that were required from all the AUs.

#### *Main phases (until May 2010)*

##### First Phase (from March to end July 2009)

As a preliminary work, the 2 interface librarians undertook what was named a preliminary “knowledge of the context” stage aiming to gather data about the university and its libraries to provide to the external expert.

For this purpose some exercises occurred and resulting documents were sent to the consultant before her venue:

- Questionnaire 1: characterization of user education experiences at Nova libraries, namely: types of subject offered, target users’ group, curriculum integration, etc.
- SWOT analysis: to identify the awareness and level of expectancies of the librarians with the project. Following the consultant’s advice it became a two-step exercise: first (2009.03.30) filled in a brainstorming conjoined meeting of all head librarians and second (2009.04.15) sent by e-mail to each of the same persons asking for individual ranking of the factors that had been identified together in the first moment.
- Questionnaire 2: characterization of Nova’s libraries in what referred to their functional and hierarchical situation in the AU they belonged to, staff, premises and some managerial and functional data.

The consultant’s initial visit was dedicated first on meeting the librarians and getting all possible additional information on the field and second on debating with the emerging Executive Committee some of the strategic steps to implement the Project in the university.

Commonly agreed proposals were afterwards presented to top university decision makers on a meeting where the Rector invited Deans and Heads of Scientific and Pedagogical Councils. Professor Sheila Corral first gave a lecture on Information Literacy in the academic scene worldwide.

Final recommendations at this phase included the plan to initiate a Pilot Project stage (here detailed at the Second Phase description) as well as other proposed formal requirements planned to initiate Nova’s project as a strategic process in the university.

For this same purpose, and after the consultant’s visit, librarians’ worked together to agree on a definition for IL as well as to select an IL model for Nova. While the first

was adapted from major library IL definitions (ACRL<sup>1</sup> and CILIP<sup>2</sup>'s), the second was adopted from SCONUL<sup>3</sup> 7 Pillars' model.

As to the strategic vision, the project interface librarians provided the GTB with several phrases from which the 3 most favored hypotheses were selected.

Then, IL definition and model, both chosen and approved by librarians were presented to the Rector and Deans.

As for the university's vision for the IL project, top stakeholders were required to make a choice, electing one among the 3 options provided. This was intended to involve Nova's hierarchy in this decision.

Nova's IL vision was thus selected and approved by Deans, July 2009, at one ordinary meeting of the College of Deans.

### **Nova Information Literacy Definition**

'Information literacy is a set of abilities requiring individuals to recognise when information is needed, have the ability to locate, evaluate, and use effectively the needed information and communicate it in an ethical manner.'

Adopted July 2009

### **Nova Information Literacy Vision**

'We want Information Literacy to create Nova scholars distinctive for their personal development, knowledge and innovation.'

Adopted July 2009

Also according to a suggestion of Prof. Sheila Corral, until the end of July 2009 librarians began archiving and sharing their user education tools on a unique collaborative platform (chosen to be Moodle because it was managed by people linked to one of the AU's Library - FCT). Access passwords to this data base were gradually given to other project partners requiring it, as the Project evolved.

Second Phase (from October 2009 to beginning January 2010)

Pilot Projects were the main objective for Nova at this phase of the project.

For this testing exercise, the interface librarians had previously suggested to the Rector the grouping of Nova's 9 AUs into fewer entities by organizing 3 main clusters according to the AUs' broader scientific areas.

Deriving from this base, the external consultant further recommended each of these clusters to focus on a specific and different IL theme (according to the 7 pillars' model) thus generating the university's 3 Pilot Projects.

---

<sup>1</sup> Association of College and Research Libraries: a division of the American Library Association.

<sup>2</sup> Chartered Institute of Library and Information Professional

<sup>3</sup> Society of College, National and University Libraries (UK)

They were assigned as follows:

PP #	Area/Domain	Acad. Units <sup>4</sup> involved	IL topic
1	Social Sciences & Humanities	FCSH, FD, FE (& MBA)	Information searching
2	Science & Technology	FCT, ISEGI, ITQB	Referencing and citations
3	Medicine & Health Sciences	ENSP, FCM & IHMT	Information sources' evaluation

Table 1 - First Pilot Projects defined for the IL project at Nova

By this time and although planned to be appointed by September 2009, the Project's Steering Committee (StC) was consecutively delayed because of major legal changes occurring in the Higher Education sector in Portugal. Significant alterations, such as bylaws' changes and elections, took place at every academic organization.

The Project's StC had been intended to serve as the top structure for the Project, both being reported to by the operational Pilot Project Teams (PPTs) and helping with the necessary dissemination to the Rector and top decision levels of Nova.

Another role of this body was to appoint one teacher per AU for the PPTs.

While StC members, mostly with a senior academic profile, waited to be appointed by Deans (also dependent of new elections), PPTs' teachers also had to wait for this previous stage, once their names were to come out of the StC's nomination...

This meant that the starting of Project Team's activities was holding up due to an external imposed suspension in this nomination cascade.

That is when the Executive Committee decided to use these delays in the project's own benefit, by building on the librarians' understanding of the project, their team cohesion and also by developing individual skills and competencies in teaching, thus enabling their improved participation in the project.

Actions taken by that time with the librarians, under the promotion of the Executive Committee:

- A full-day Pedagogical Forum (October 20<sup>th</sup> 2009) oriented by the pedagogical expert. For the first time this session gathered all Nova's librarians not just only the Heads of Libraries.
- Meeting 1 (November 10<sup>th</sup> 2009), aiming to describe the Project in more detail and also give room to a general discussion. The interface librarians showed 3 power point presentations, meant to work as "demos" to illustrate the type of contents that could be addressed by librarians at each of the planned PPTs.
- Meeting 2 (January 6<sup>th</sup> 2010), where further participation options were jointly discussed, i.e. possible lines of action that librarians felt they could assume at their specific UAs in order to collaborate at each of the PPTs (and taking into account the resources and cultural differences among Nova's institutions and their libraries). A main objective was to previously prepare a range of tools and materials to be offered as for potential use at the first PPT meeting with teachers.
- A 3<sup>rd</sup> more informal meeting was later organized as most librarians still wished to have an intermediate session (before the first PPT meeting) so as to show their presentations and thus get comments and feed-back from the colleagues.

---

<sup>4</sup> FCSH (Faculdade de Ciências Sociais e Humanas); FD (Faculdade de Direito); FE (Faculdade de Economia); FCT (Faculdade de Ciências e Tecnologia); ISEGI (Instituto de Estatística e Gestão da Informação); ITQB (Instituto de Tecnologia e química Biológica); ENSP (Escola Nacional de Saúde Pública); FCM (Faculdade de Ciências Médicas); IHMT (Instituto de Higiene Medicina Tropical).

### Third Phase (from end January 2010 and ongoing)

When the project's names assignment cascade was concluded, the first StC meeting finally took place at January 27<sup>th</sup>, followed by the PPT meeting (February 17<sup>th</sup> 2010). This first PPT meeting finally brought together people from the 2 major groups partnering for the Nova's Project: teachers and librarians.

It focused in establishing the Pilot Projects' agenda looking for one proposal per PP group, minimum.

After an initial presentation of IL concepts, the project's aims and also the tools that had been meanwhile prepared by librarians, the session mostly gave room to group discussion; it was the first time participants met together, not only teachers with librarians but even teachers from different AUs.

There was a general constructive reaction although obviously group work was made easier for more homogeneous groups (namely the Health PPT3) and more difficult for the Sciences and Humanities PPT1 where Law, Economics and Sciences and Humanities had to face more specific cases.

At the second PPT Meeting (April 15<sup>th</sup> 2010) it was recognized that some of the aims established during the first meeting at each AU level could not be met for different reasons. However several totally new experiences took place meanwhile (partially described at table 2).

For the sake of present EAHIL context we wish to pinpoint for instance PPT3's, the Health sector team experience, where 3 AUs cooperated so as to offer an Open Workshop on their theme (Evaluation of Information resources) to doctoral students from these academic units (4 hours).

All PPTs experiences were registered and some of them evaluated using different means, mostly drawn from a questionnaire designed by librarians from PPT1.

Some groups reported positive and negative aspects of their specific experience.

All this amount of work was collected, registered and reported to the consultant before her second venue (3-6 May 2010), although not yet analyzed as a whole.

For her second venue Professor Sheila Corral besides mostly working with the Executive Committee, had specific meetings with different Project stakeholders such as:

- A PPTs meeting (May 4<sup>th</sup>) so as to present and discuss future developments as well as to address specific questions from the participants.
- A presentation and debate at the College of Deans (May 6<sup>th</sup>) where main results of the work undertaken and new prospects for the Project were shown to the top stakeholders.

### METHODS

At this stage IL Strategy Project at Nova shows elements of two different types: one with strategic management characteristics, the other with some components of an "action research" type of approach.

In favor of the first, the Project started with the clear intention of promoting change through a top-down decision strategy and thus shows many top-down guided features, while in favor of the second, process and outcomes have been registering ongoing modifications, thus turning thinking, knowledge and therefore action sometimes difficult.

In spite of the fact that some "action research" characteristics could apply, such as the succession of planning, acting and evaluating steps as well as the sense of communities of practice under the supervision of project leaders, a prior research purpose was not established for this Project.

So far, although benefitting from multi-level and multi-professional partnership the Project has been strongly guided close to top level with a core role played by the Executive Committee.

At this stage Novas's project may be better defined as a "middle up down" strategic management approach with the Executive Committee playing a core role.

It was now recognized that this Committee's action evolves through constant moves from operational to tactical and from tactical to strategic levels, making links wherever and whenever needed.

At the current stage a representation of Nova's IL Strategic Project has been designed as a Model, thus helping to convey a visual description of the Project as it developed so far.

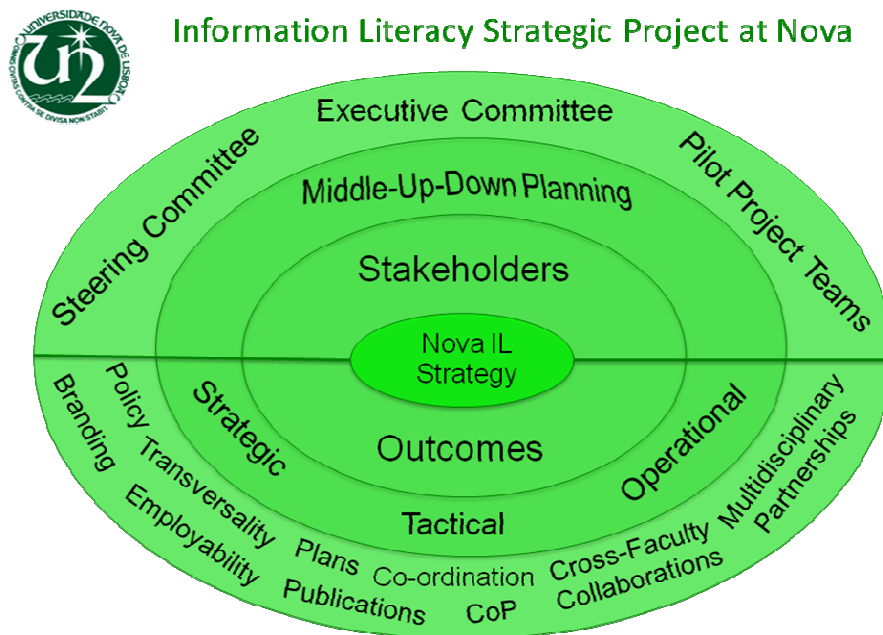


Figure 2 - IL strategic project at Nova MODEL

## RESULTS

Nova's Project is ongoing and in spite of much work that has been done, it still can be considered at its earlier phases.

However some of its present outcomes deserve to be stressed:

- A novel awareness of some teachers and some top university decision-makers to the IL concept and scope, as well as to the usefulness it can bring to the academic scene.
- An improvement of Nova's librarians' skills and competencies as well as confidence in their role in the project, however diverse it may be.
- Sharing of librarians' diverse education tools (through Moodle platform) first, just among this professional body, and later already including some teachers' that also required access.
- Growing IL contents at Nova, although presenting some distinct characteristics we try to summarize in this table:

IL intervention type	Application contexts	Participants
Adoption of commonly created instruments (such as questionnaires) either to identify students' IL knowledge level (pre-test) or to evaluate learning for IL (pre and post- test)	FCSH (Library) <sup>(a)</sup> ; FD (Library) <sup>(a)</sup> ; FE (class) <sup>(b)</sup>	<sup>(a)</sup> Librarians <sup>(b)</sup> Teachers & Librarians
Readjustment of pre-existing course programmes mostly focusing IL contents so as they become part of the IL Project	ISEGI <sup>(a)</sup> ; FCSH-História <sup>(b)</sup>	<sup>(a)</sup> Teachers & Librarians <sup>(b)</sup> Teachers
Specific extra-curricular IL sessions (different types)	ITQB <sup>(a)</sup> ; ENSP/FCM/IHMT <sup>(b)</sup>	<sup>(a)</sup> Librarians <sup>(b)</sup> Teachers & Librarians
Integration of IL modules into an existent curricular course	FCT	Teachers & Librarians
Creation of specific IL curricular units integrating the institutional curriculum	ENSP; FCM	Librarians

Table 2 - Types of intervention resulting from the first Pilot Projects initiatives

Besides these outcomes, we also wish to stress the emergence of new dynamics that were behind the Project at Nova.

They are:

- Multidisciplinary work: new partnerships among diverse professional groups, such as librarians and teachers but also pedagogical experts.
- Novel inter-institutional cooperation: team work joined together partners from different academic units.

Those dynamics were considered truly innovative in this particular university context and thus place this Project as a factor of cohesion and desired transversal articulation in Nova's traditionally independent culture.

## DISCUSSION

An issue that was acknowledged from the early steps of this project is the fact that Nova integrates many diverse contexts and cultures and consequently the project's pace would have to take into account such diversity in order to achieve a true university-wide implantation.

Scientific thinking has been applied since the beginning of the project both by building on IL concepts and by using well-known and validated definitions and models.

Our practice of rigorous registration of key decisions, of meetings as well as the reporting of project's milestones, will certainly contribute to facilitate overall analysis and improve critical thinking for the next steps.

Some of the project weaknesses and/or difficulties were jointly identified as follows:

- Lack of a dedicated administrative coordination for the Project - all participants had to share their usual duties with the project. This was particularly difficult for the Executive Committee members who met numerous times to prepare meetings, plan the consultant's venue and also had to write minutes and reports, among many other tasks.
- Insufficient dissemination both inside Nova's AUs and at external level - some issues were already discussed raising several proposals to respond to this need, going from web diffusion to paper and communications' submission to scientific Conference and journals. One interesting idea is to organize "road show"-kind sessions to take to every AU and, by personal contact trying to collect more interested participants as well. The idea of gathering Project's "champions" either at teachers' and students' levels is another issue that may contribute to spreading both awareness and adhesion. It is expected that a growing visibility of the Project will also promote wider



communication and thus facilitate StC members' intended role at higher hierarchical level.

A major difficulty felt by many of the Project's partners was the overall evaluation of fragmented and diverse results. This was addressed by the consultant's advice to use an overarching evaluation framework where different practices can be incorporated and linked together for the Project's global evaluation needs. This is the major next step to be prepared and undertaken.

Near developments will require the PPTs partners meeting together again and discussing further practical issues and next desired steps. There is a tendency towards going on with a "market consolidation" approach of the project, namely by re-allocating the same pilot topics among existing Project Teams.

As previously stated, although being strategically planned, the flexibility Nova's IL Project took while developing (coming from active participation as well as specific events), cannot absolutely guarantee what next developments will be.

Such flexibility can also be highlighted as a particular characteristic of this Project.

## CONCLUSIONS

Although being the presentation of a specific case and thus strongly contextualized we realized that many issues that we have been identifying as crucial to Nova's Project also were reported as such in some other universities abroad undertaking IL projects, as referred by the external consultant in one of her presentations. They are linked to top strategic difficulties, dedication to the project, partnership, articulation and focus, dissemination and championship, teaching quality and funding, among some others. One further issue we also would like to stress as important is the perception that IL projects such as ours must be envisaged as true partner endeavors, that is, neither a librarians' nor a teachers' only aim.

Finally we feel that our university wide strategic intention both requires regular top support and flexible adaptation to continuous unpredicted events.

## ACKNOWLEDGMENTS

The Authors first wish to mention Nova's Rector (now also elected as Head of CRUP, the forum for all Portuguese Rectors) for being the top initial sponsor for this Project and also the external consultant Professor Sheila Corral for her knowledgeable support and guidance.

A second mention goes to the other Executive Committee members: Professor Lurdes Rosa and particularly Professor Patricia Rosado Pinto, who as a pedagogical expert and active participant in several university external evaluations was seminal in many discussions and planning of this Project.

Last but not least we want to thank our entire Project's partners (mainly teachers and librarians) without whom no such Projects can be built.

Finally we also wish to mention some other collaborators who usefully helped with secretariat and other supporting tasks.

Besides those closely involved, other stakeholders should be here mentioned and thanked, particularly those from the Gulbenkian Foundation who has supported the external consultant's travel and stay.

## REFERENCES

ALA. ACRL [Internet] Chicago, Illinois: The Association of College and Research Libraries. The American Library Association; June 2003 [cited 2009 Feb 02]. Available from: <http://www.ala.org/ala/acrl/acrlstandards/characteristics.htm>

ALA. ACRL. Information literacy competency standards for higher education [Internet]. Chicago, Illinois: The Association of College and Research Libraries. The American Library Association; 2000 [cited 2009 Feb 02]. Available from: <http://www.ala.org/ala/mgrps/divs/acrl/standards/standards.pdf>

Cooper, DR; Schindler, PS. Business research methods, 6<sup>th</sup> ed. Boston: Irwin/McGraw-Hill, 1998. (McGraw-Hill International Editions: Statistics and Probability Series)

Corrall, S. Information literacy strategy development in higher education: an exploratory study. Internat J Informat Manag. 2008 Feb; 28 (1): 26-37.

Miller, RL; Brewer, JD, editors. The A-Z of Social Research: a dictionary of key Social Science research concepts. London: Sage, 2003.

Sen, B; Corrall, S. Establishing critical success factors for information literacy [MSpowerpoint presentation]. Sheffield: The University of Sheffield; 2010.

SCONUL [Internet]. London: Advisory Committee on Information Literacy. The Society of College, National and University Libraries; 1999 [cited 2009 Feb 02]. Available from:

[http://www.sconul.ac.uk/groups/information\\_literacy/papers/Seven\\_pillars.html](http://www.sconul.ac.uk/groups/information_literacy/papers/Seven_pillars.html)