Section 1: Planning a resource centre

Planning is important to ensure that the resource centre will serve a useful purpose. Planning starts with finding out what information people need, and deciding how to meet their information needs. It includes developing clear aims for the resource centre, and deciding what activities to carry out to meet these aims. Planning also includes deciding how to evaluate the resource centre, to see how far it is meeting its aims.

Planning is not something that only happens once at the beginning, but is part of a continuing process. The results of evaluation should be used to draw up new plans for developing the resource centre further.

This section includes:
1.1   Assessing information needs
1.2   Planning
1.3   Developing an action plan
1.4   Interviewing Strategic tips and sample questionnaires

Related sections include:
2.2   Advisory committees
8.3   Networks and networking
9   Monitoring and evaluation

1.1 Assessing information needs

It is important to find out about the people who will use the resource centre. This includes finding out what information they need, what information is provided by other organisations, and how far their needs for information are being met. This is known as carrying out a needs assessment.

After the resource centre has been established, a needs assessment should be carried out every one or two years, to ensure that the resource centre continues to meet the information needs of its users.

A needs assessment looks at:

1. **Who the users will be**
    Their age, sex, educational level, literacy level and type of work they do

2. **What their information needs are**
    What main subjects they need information about
    What other subjects they need information about
    What they will use the materials in the resource centre for (in order of priority)
    Which activities the materials will be most useful for
    How important local/national/regional/international information is
    What formats of materials will be useful:
    *   articles (for writing reports and getting new ideas for activities)
    *   books and other documents (for getting a comprehensive picture of a topic)
    *   personal advice (to help plan activities)
    *   training manuals (to assist with a training activity)
    *   videos (for training and health education)
    *   abstracts of published articles (to keep up-to-date on new developments and know what to follow up)
    *   newsletters (to find out what new developments are taking place in the subject area, and what other organisations are doing).

3. **What materials are available**
    What other sources of published and unpublished materials exist
    How much materials cost, and whether health workers can afford to buy them
    What gaps there are (in terms of subject, type of material, such as training manual, reference material), language, format (such as book, audiovisual), and educational level
    What other sources of information exist:
    *   government services and departments
    *   non-governmental organisations (NGOs)
    *   mass media (newspapers, radio, television)
    *   e-mail and Internet services.

4. How information can be disseminated

What methods for disseminating information would best suit resource centre users (such as resource lists, current awareness bulletins or document supply services)

How feasible these methods are.

A needs assessment can be carried out by interviewing people individually, organising a focus group discussion (a structured discussion with a small group of potential users) or by asking potential users to complete a questionnaire. Interviews and discussions are better, as they provide an opportunity to meet people and discuss their needs. If a questionnaire is used, it should be made easy for people to complete. This can be done by listing the most likely answers, so that people only need to tick a box or circle a word.

It is important to collect only essential information. Too much information can be confusing. Tips for conducting interviews and an example of a needs assessment questionnaire are given in Section 1.4.1.

As well as assessing users' information needs, it is important to find out what information is provided by other organisations. This will help to ensure that the resource centre will fill a gap and not duplicate the work of others. It will also provide an opportunity to contact other organisations working in related areas, which could be useful for future work (see Section 8.3: Networks and networking). Staff of other organisations can be either interviewed or asked to complete a questionnaire.

An example of a questionnaire for other information providers is given in Section 1.4.2.

A focus group discussion can help identify information needs

1.2 Strategic planning

A resource centre needs a clear purpose and overall plan of activities for the longer term. This is known as a strategic plan. The strategic plan provides a framework for making shorter-term plans and decisions. It describes:
- the overall aim or aims of the resource centre during a particular period, such as the next five years (usually one or two broad statements)
- objectives (usually about four to six statements describing different ways in which the resource centre will fulfil its overall aim)
- plans for specific activities (action plans) that will enable the resource centre to meet its objectives.

The strategic plan needs to reflect the resource centre's mission. The mission is usually expressed as a broad statement describing the resource centre's values and what it is setting out to achieve in the long term.

It is important that staff and users are involved in developing the strategic plan, to ensure that their knowledge feeds into it. It is also important for staff to be aware of the strategic plan, so that they understand what the resource centre is aiming to do, whom it is for, what services are available, and why some services are given higher priority than others.

A strategic plan needs to be reviewed and revised regularly. It needs to allow some flexibility for the resource centre to change over time, in response to new needs and circumstances. An annual review helps to incorporate changing needs and circumstances into the plan.

1.2.1 How to develop a strategic plan

The strategic plan should be developed by the resource centre officer, members of the resource centre advisory committee and/or other users, and management staff of the organisation that the resource centre is part of. Overall responsibility for the strategic plan lies with management.

It is best to set aside a day for a strategic planning meeting. Decide whom to ask to the meeting (preferably between five and ten people) and explain the purpose of the meeting to them in advance.

Decide who will facilitate the meeting and who will take notes. Try to hold the meeting in a room where you will not be disturbed. It is useful to have a flipchart and marker pens, and adhesive material or pins for putting up large sheets of paper. It is worth providing refreshments.

Section 1.2.2 lists key questions to consider when planning a resource centre. You can use these to guide your discussions. Allow as open a discussion as possible. Write up all the ideas, and note those where there is agreement. You may find that you come up with 'ideal' objectives that then have to be modified to make them possible to achieve. Objectives should be 'SMART': Specific, Measurable (so you can tell whether they have been achieved), Achievable, Relevant and Time-limited (to be achieved by an agreed time).

You may not be able to finalise the strategic plan at the meeting. You may need to take away the notes and use them to draft a strategic plan, which you can then circulate for approval or comments.

1.2.2 Key questions for planning a resource centre

1. **Vision**
    What do you want the resource centre to be in five years?
    What do you need to enable this to be achieved (in terms of human resources, equipment and financial resources)?

2. **External environment**
    What trends in the health sector or other sectors are likely to influence the resource centre?
    Who are the key information providers working in the health sector and related sectors?
    What links with other organisations might be important?
    What impact might other organisations have on your resource centre?
    What impact might technological developments have?
    What will be the effect of people knowing about the resource centre?

3. **Mission**
    What are the resource centre's values?
    Who will the resource centre serve?
    What are their needs?
    How will the resource centre meet the needs of these people?

4. **Aim**
    What should the broad, long-term aim be?
    How will it support the mission?

5. **Objectives**
    What should the objectives be for the next few years?
    How will they support the overall aim?
    Are they specific, measurable, achievable, relevant and time-limited?

6. **Action plan**
    What activities need to be carried out to achieve the objectives?
    How will these activities be carried out?
    Who will carry them out?
    When will the activities be started and completed?
    Will the activities have measurable 'milestones' and results?
    How will you know when they are finished?
    What resources (such as staff, funds and equipment) are necessary, and are they available?

7. **Communication**
    What are the different audiences that need to be communicated with?
    What messages need to be communicated to them?
    How can these messages be communicated?
    How will plans for communication fit into the overall strategic plan?

8. **Contingencies**
    Have 'what if' situations been worked out and alternative plans been
    considered?
    Are they realistic?

9. **Policies and procedures**
    Have written operating policies been produced for the resource centre?
    Will existing policies and procedures support the action plan?
    Will new policies be needed?

10. **Resources**
    Are resources (funds, equipment and staff) available to implement planned
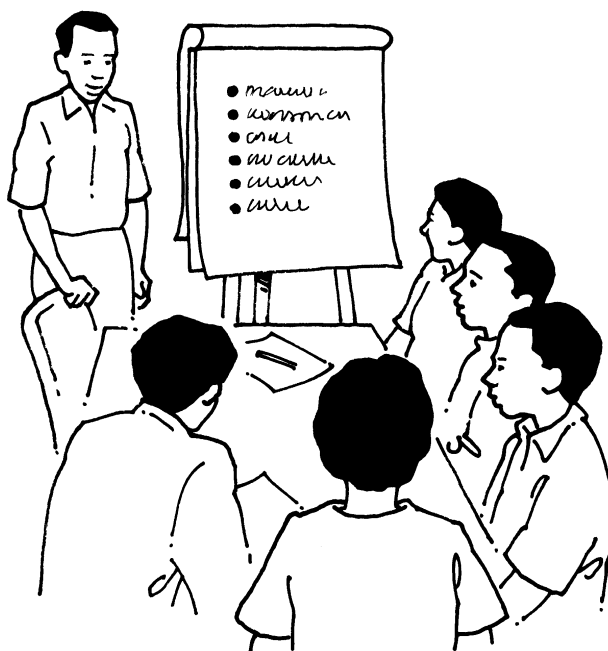   activities?
    If not, can they be acquired?
    Are estimates of resources needed realistic?
    Can the action plan be used to develop budgets?

11. **Monitoring and evaluation**
    How will the strategic plan be monitored and evaluated?
    Who will be responsible for monitoring and evaluation?

Staff and users can be involved in developing strategies for the resource centre

1.3 Developing an action plan

Developing an action plan means turning ideas raised during strategic planning or evaluation into reality. It means identifying the steps that need to be taken to achieve the resource centre's aims. The resource centre officer and their manager or supervisor should develop the action plan, in consultation with members of the resource centre advisory committee and/or other users.

It is useful to have action plans for each area of the resource centre's work, such as:
- fundraising
- selecting and ordering materials
- organising materials
- computerisation
- providing information services
- promoting the resource centre
- networking and cooperation.

1.3.1 How to develop an action plan

An action plan consists of seven steps: setting objectives, assessing the objectives, identifying action required to meet the objectives, working out how to evaluate the activity, agreeing a time-frame for action, identifying resources (human, financial and technical), finalising the plan, and evaluating the results.

1. **Set objectives**
    You need to identify clear objectives that will guide your work to achieve the resource centre's aims. Objectives need to be achievable – do not be over-ambitious. They need to be measurable (for example, a certain number of activities carried out within a certain period), so that you can know whether you have achieved them. Ask yourself:
    - What do we want to achieve?
      Example of an aim: To disseminate information that will improve local health workers' knowledge of local health problems.
      Example of an objective: To produce and distribute an information pack on malaria diagnosis and management to all health clinics in the district within the next three months.

2. **Assess the objectives**
    Assessment helps to determine whether or not the objective is appropriate. It may result in confirming the objective, abandoning it or revising it. Ask yourself:
    - Is the objective compatible with the resource centre's aims and objectives?
    - Are the necessary resources (funds, equipment, staff) available to reach this objective? If not, are they obtainable?
    - What problems might arise in working to achieve this objective?

- *Example of resources needed to carry out the objective:* staff time, relevant materials in the resource centre or obtainable from elsewhere, stationery, photocopier, postage.
- *Example of revised objective:* To produce and distribute an information pack on malaria diagnosis and management to 20 health clinics and training institutions within the next six months.

3. **Identify action required to achieve the objective**
   A series of tasks needs to be identified for the objectives to be achieved. List these as steps. Ask yourself:
   - What tasks are necessary, in what order, to meet the objective?
     Example:
     1. Plan the content of the information pack and decide how to distribute the packs, in consultation with other staff and users.
     2. Calculate costs and staff time, and make sure that funds and time are available.
     3. Allocate responsibilities.
     4. Gather information for the pack (search resource centre, contact other organisations).
     5. Request permission from publishers to photocopy material.
     6. Photocopy material and prepare packs.
     7. Distribute packs.

4. **Work out how to evaluate the activity**
   Plans for finding out how far the activity has achieved its objectives need to be built into the action plan. Ask yourself:
   - How will we know whether we have achieved our objectives?
     Example:
     8. Contact five clinics to see whether they have received the packs.
     9. Include an evaluation form in the pack, asking health workers whether the information has improved their knowledge, how they have used the information, and how future packs could be improved. Assess the feedback from the forms.

   Then incorporate plans for evaluation into your action plan.
   *Example (showing plans for evaluation in **bold italics**):*
   1. Plan the content of the information pack, ***including evaluation forms***, and decide how to distribute the packs, in consultation with other staff and users.
   2. Calculate costs and staff time, and make sure that funds and time are available.
   3. Allocate responsibilities.
   4. Gather information for the pack (search resource centre, contact other organisations).
   5. Request permission from publishers to photocopy material.
   6. ***Prepare evaluation forms.***
   7. Photocopy material, prepare packs.
   8. Distribute packs.
   9. ***Contact clinics to see if they have received packs.***

10. *Revise plans for distributing packs if they have not reached some clinics.*
11. *Assess the feedback from the evaluation forms and use it to plan future work.*

5. Agree a time frame
As you identify each task, work out how long it will take and when it needs to be done. This will help you to see whether your action plan is on schedule or whether you need to modify the schedule. Ask yourself:
- What is the actual time required for each individual task? (Be careful not to under-estimate)
- When will each step be completed?
Example: Total of 18 days over a three-month period.

6. Assess the action plan
Ask yourself:
- How will you know whether the individual tasks have been achieved?
- Have you allowed for possible interruptions?
- Have you tried to do too much or too little?

An action plan must be realistic if it is to work. It is easy to over-estimate what you can do, leading to disappointment and failure. For example:
1. Leaflets that you had planned to include in the pack may have run out and need to be reprinted. Can you substitute something else, or will you need to arrange for them to be reprinted before you can finish preparing the packs?
2. The member of staff preparing the pack will take annual leave for six weeks during the period in which the pack was planned to be prepared. Can you re-schedule the work, or can someone else do it?

7. Finalise the action plan
Revise the action plan. Obtain feedback and comments from colleagues, and revise it again if necessary.

1.4 Interviewing tips and sample questionnaires

Tips for conducting interviews

- Arrange the interview in advance and explain the purpose of the interview.
- Find out about the person or people you are interviewing in advance, if possible – the type of work they do, and what subjects they are interested in.
- Write down a list of questions, allowing space between questions to write down people's responses. A tick or one-word answer will help your interview flow.
- Think of an opening statement explaining why you are asking these questions, such as: 'We are planning to set up a resource centre for ... and want to ensure that it provides services that you will find useful'.
- Keep interviews brief but cover enough to serve the purpose (30 minutes).
- Finish by thanking the person and saying that when you have completed the interviews and analysed the results, you will distribute a summary of the main points.

1.4.1 Information needs assessment questionnaire (example)

The following questions can be used for focus group discussions, individual interviews or questionnaires. Possible answers to some are listed. It sometimes helps to use these to prompt people. If you use a questionnaire, list possible answers with a 'tick box' beside them, so that people only need to tick a box.

1a. Please tell us briefly about the work that you do.
   For example, activities and tasks, people you provide services to (your target audience)

   _____
   _____
   _____
   _____

1b. Please tell us briefly about the main health problems (morbidity and mortality) in your area.

   _____
   _____
   _____

2a. Where do you currently get information?
   ☐ government departments
   ☐ NGOs
   ☐ mass media
   ☐ public libraries
   ☐ other (please specify) _____

2b. Is there a resource centre or library where you have found information that is useful to you? ☐ yes ☐ no
   If yes, where is it? _____

3. What subjects do you need information about and would you like to see contained in the proposed resource centre?

   _____
   _____

4. Which of the subjects you listed above are most important?

   _____
   _____

5a. What type of information would be useful, and what would be the priority?
   ☐ books
   ☐ training materials
   ☐ journals
   ☐ newsletters
   ☐ videos
   ☐ other (please specify) _____

5b. How might you use the different types of information?
   ☐ self-learning/awareness
   ☐ teaching/training
   ☐ working with the community
   ☐ planning activities
   ☐ other (please specify) _____

5c. What balance would you like between printed materials and audiovisual materials?
   _____

6. What language(s) would you like materials to be in?
   _____

7. What geographical focus would be most useful?
   ☐ local
   ☐ national
   ☐ regional and/or international (please specify) _____

8. What services should the resource centre provide?
   ☐ lending
   ☐ current awareness (informing users of newly received materials)
   ☐ resource lists
   ☐ photocopying
   ☐ advice on useful resources
   ☐ other (please specify) _____

9. What equipment and teaching aids would you find useful?
   ☐ video player
   ☐ slide projector
   ☐ overhead project
   ☐ duplicating machine
   ☐ photocopier
   ☐ other (please specify) _____

10a. Where would you like the resource centre to be located?
   _____

10b. When would you like the resource centre to be open?
   _____

11. Are there any other issues that we should take into consideration?
   _____
   _____
   _____

1.4.2 Questionnaire for other organisations that provide information

On the next page is a sample questionnaire for other organisations that provide information. You may need to change parts of it to suit your needs, such as the categories listed under the question, 'Who uses the information in your resource centre?'

Remember to include an introductory paragraph, explaining why you are asking people to complete the questionnaire. It is also useful to include a date by which you would like the questionnaire to be returned. Remember to include the address for returning the questionnaire.

Questionnaire for information providers

We are planning to set up a resource centre, and we are currently assessing the information needs of people who will use it. As part of this needs assessment, we are carrying out a survey of other organisations that provide information. Your answers to this questionnaire will help us to ensure that the new resource centre will not duplicate existing services.

We would be very grateful if you could complete this questionnaire and return it by *[add date]* to: *[add your name and address]*.

1. **Your organisation**
    Name of organisation   _____
    Physical and postal address _____
    _____
    Telephone _____   Fax _____
    E-mail _____   Website _____
    Contact person's name and job title _____
    Number of staff   _____
    Main activities _____
    _____
    _____
    _____

2. **Resource centre**

    a. Briefly describe the role of the resource centre and its main activities.
        _____
        _____
        _____
        _____

    b. Is anyone responsible for information activities? ☐ Yes ☐ No
        If yes, please give job title, experience and how much time is allocated to information-related activities.
        _____
        _____

3. **Collection size and content**

    a. How many materials are in the resource centre? _____

    b. What are the main subject areas? _____

c. What formats do you collect?
  □ books
  □ journals/newsletters
  □ videos
  □ CD-ROMs
  □ slides
  □ posters
  □ others (please list) _____

d. What gaps exist in the information collection?
  Please specify type, e.g. reference material, language, format (book, manual etc), educational level.
  _____

4. Information sources and use

a. What other resource centres exist locally?
  _____
  _____

b. What organisations, nationally, regionally and internationally, do you get information from?
  _____
  _____

c. Who uses the information in your resource centre?
  □ teachers/trainers
  □ hospital workers
  □ community health workers
  □ community groups
  □ others (please specify) _____

d. How is the information used?
  □ teaching and training
  □ share with colleagues
  □ personal reference
  □ basis for developing own materials
  □ research
  □ problem-solving (give examples if possible)
  □ other (please specify) _____

5. Organisation of information

a. How do you store your information materials?
  □ in box files
  □ organised on shelves
  □ heaped on shelves
  □ no organised order
  □ other (please specify) _____

b. If your information is organised, what classification scheme do you use? Please give details or attach an example.

_____

c. What systems for processing and accessing the information have been developed?
☐ card catalogue
☐ computer database
☐ database on website
☐ other (please specify) _____

6. Information services

What are the main information services offered by your resource centre?
☐ lending
☐ current awareness (informing users of newly received materials)
☐ resource lists
☐ photocopying
☐ advice on useful materials
☐ Internet
☐ e-mail
☐ CD-ROM
☐ other (please specify) _____

7. Access

a. How accessible is the resource centre to users (steps, layout, narrow corridors)?

_____

b. What are the resource centre's opening hours?

_____

c. Is it easily accessible (for example, is it near public transport)?

_____

d. How are the shelves laid out (in rows, or round the edge of the room)?

_____

Thank you for completing this questionnaire.