Proposal to Establish the Professional Learning Centre (PLC) as an EDU:C to be Known as the iSchool Institute (iSI)

Faculty of Information, University of Toronto
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We propose to establish the Faculty of Information’s Professional Learning Centre (PLC) as an EDU:C in the Faculty of Information (iSchool) at the University of Toronto, and to concurrently rename it to the iSchool Institute (iSI). The iSI builds upon the success of the PLC in bringing continuing education for those who work in the information disciplines to students in multiple cities. The new iSI will continue to offer courses and certificates in this area, but will add the following capabilities:

- A speaker program, featuring both members of the Faculty and distinguished practitioners in the information professions, aimed at the general public, students in the Faculty, and other interested parties;
- A program of managerial and executive roundtables, group discussions and working sessions combining speakers, Faculty members and the attendees, aimed at improving information exploitation and work;
- An offering to the community in consulting by Faculty of Information faculty and the opportunity for the Faculty and its students to undertake research in working settings;
- A program bringing industry together with the Faculty, independent practitioners and other parties to improve the speed and intensity of commercialization of research done in the Faculty of Information;
- A publishing program offering periodic studies applying Faculty research to organizational issues;
- An enhanced offering for distance learners in bringing different models of eLearning continuing education to the market;
- An offering of customized continuing education programs in an “on site” format for clients;
- The ongoing expansion and inclusion of practitioners, Faculty members and Faculty students in preparing, delivering and/or tutoring continuing education offerings in line with the original mandate of the PLC; and
- Explore developing new, potentially multi-Faculty continuing education programs centred around the requirements of information work in its many forms.

(A) Background

The PLC was established to provide for the continuing education needs of those people in various information-related roles (libraries, archives, records management, information architecture and information exploitation by organizations). While many of these hold graduate degrees in Information, Library or Museum Studies, there are also

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1 Version 0.1 Draft (BAS) 25/01/2010. Version 0.2 Draft (BAS) 12/02/2010 after consultation with Faculty members and students, the alumni association, and Faculty administration.
PLC students who do not have these backgrounds and are responding to a change in role imposed by their employers to augment their on-the-job training with appropriate supporting skill development attuned to the needs of their clerical or supporting roles. The PLC’s courses are not meant to substitute for formal education by the Faculty, but to enhance the working skills of prior graduates and transferred staff so as to improve organizational results in the use of information in workplaces.

The PLC has used a mixture of faculty members of the Faculty of Information and external partners (practitioners in the field) to design and deliver a comprehensive set of continuing education-style courses (8-20 instructional hours), both as stand-alone courses and formed into certificate programs. At this time there are approximately sixty individuals who provide instruction for the PLC, which offers courses on the St. George Campus using the facilities of the Faculty of Information, and in Ottawa using conference rooms rented as required, in addition to a number of courses delivered using the University of Toronto’s Blackboard servers as eLearning offerings. All courses currently offered are fitted into a sessional schedule in a three-term structure (Fall, Winter, and Summer).

The PLC has been, throughout, a self-funded organization, which pays for Faculty of Information services and resources, remits a portion of any excess income to the Faculty, and pays for its own staff out of its earnings. PLC earnings have been used to augment the teaching facilities (labs, etc.) of the Faculty, making for a better student experience both within the graduate programs of the Faculty, and within the continuing education programs of the PLC.

(B) Proposal

The PLC will be transitioned from its current status within the Faculty of Information into an EDU:C research centre, in accordance with University of Toronto policies and guidelines. This move will:

- Recognize the broad mandate of the PLC in serving students, organizations and the broader public outside of the Faculty of Information’s degree programs and Faculty events;
- Facilitate its governance, management and oversight within governing University of Toronto practices; and
- Enable the PLC to make a significant contribution to the Faculty’s intellectual presence within the University of Toronto.

As an EDU:C, the PLC will not be authorized to make primary teaching appointments. It will appoint instructors for its continuing education courses who are selected to develop

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and/or deliver these courses. Although none are intended immediately, the PLC (EDU:C) may hold cross-appointed faculty whose primary affiliation is as an appointee elsewhere within the University of Toronto.

The PLC will be responsible for selecting and making use of qualified expert external resources for its speaker program, the creation of salable research reports for use in organizations, and other activities where the demand for these exceeds the Faculty's current capability to supply them while maintaining its high levels of academic research and publication, its teaching demands, and the requirements of mentoring students through their studies. No such resource will be a part of Faculty offerings without the Faculty Council's approval.

(C) Vision and Mandate

Organizations urgently need, in the face of the demographic transition expected to begin within the next two years, to reassign their staff that perform library, records management, information management, practical knowledge management and collaboration support, public interaction in and around museums, especially community efforts, and archive forensic investigations to deal with retirements and resignations. In addition, many types of work which are centred in the theories and practices taught in the Faculty's degree programs are not commonly recognized as such within industry and government. Ensuring that potential and current employers are aware of these situations and opportunities, and that the Faculty's students are aware of the breadth of opportunities that can await them, is a key reason for initiating and maintaining a community-facing outreach effort such as the iSI.

At the same time, prior graduates of the MI, MSt, MLS or MMS degrees generally require periodic refreshing and reconnection with the academic community at the Faculty of Information in order to remain on the leading edge of their fields, in the same way and to take advantage of a rapidly evolving set of practices, and to deal with the challenges of reconstructing the past from archived records in the face of regulatory enquiries, freedom of information requirements, and other aspects of public sector and regulated industry governance (or from business governance law such as the Sarbanes-Oxley provisions, Ontario’s Bill 198, Australia’s CLER9 regulations, etc.), where increasingly through this decade the principals involved at the time may no longer be accessible or bound to the organization.

The iSchool Institute (iSI) will engage in public education to the standards set by the Faculty of Information and the University of Toronto designed to meet the needs of these students. It offers its courses and programs in multiple locations (the PLC already teaches regularly in Ottawa as well as Toronto) and an increasing number of offerings via eLearning methods. These courses are currently all offered on a scheduled semester basis. As an EDU:C, the PLC will also use its courses and instructors to deliver custom offerings directly at client locations on a contracted basis, and look to develop effective learner-paced instruction eLearning offerings available with or without
the support of a tutor, to further meet the market’s need for effective, rapid access to information.

In support of the Faculty of Information’s own objectives, the iSI will also offer regular public lectures, bringing speakers of global or national renown to speak at the Faculty, and to anchor a program of roundtables and other executive-oriented venues designed to bring the senior leadership of the types of organizations that employ the Faculty’s graduate to the University and support student acquisition both for the Faculty’s degree programs, and for the Institute’s offerings.

The Institute does not conduct direct academic research, but instead depends upon the research done within the Faculty and its other associated units, plus other Faculties within the University of Toronto. It does, however, seek out and probe intersections between these bodies of knowledge, and commissions experimental offerings ranging from round-tables and colloquia, to the creation of novel courses leading to new interdisciplinary certifications in the “information space”. It also seeks to bring key private sector thinkers and companies operating in this space together with the Faculty and members of other Faculties, along with current and potential clients, to accelerate the conversion of research findings into product offerings and processes for organizations. These will be organized as a variably-sized set of projects, funded by their participants, each of which is managed within the context of leadership and support supplied by the Institute director.

The expanded mission of this EDU:C suggests strongly that the PLC should be renamed to the “iSchool Institute” (iSI) as a result of the transition to EDU:C status.

(D) Administrative Structure and Governance

In accordance with accepted University of Toronto practice, governance structures for the iSI are to be in keeping with the University’s guidance on the governance of EDU:Cs\(^3\). Within the governance and administrative structure of the iSI, there will be four main components:

- The Dean
- The Director
- The Executive Committee
- The Advisory Board

**The Dean.** As a part of the administrative structure of the Faculty of Information, the iSI will report to its Dean. The Dean is responsible for the establishment of the Institute, and periodic reviews (at least every seven years) of its mandate and direction. The Dean is responsible for ensuring that the Director operates the Institute in a manner appropriate to the mandate of the Institute and in line with University of Toronto policies and procedures. The Dean will receive annual reports from the Director, via the Executive Committee. The Dean or designate sits *ex officio* on the Advisory Board.

\(^3\) As referred to *supra*, page 1.
The Director. The Director of the iSchool Institute will have responsibility for the planning, finances, and operations of the Institute, and will discharge such responsibilities for the good of the Institute, the Faculty of Information, the University as a whole, and other local, national and international communities, in consultation with the Executive Committee and Advisory Board. The Director is appointed by the Dean on the advice of the Executive Committee (excluding the incumbent Director of the PLC) for a period of five years, renewable once.

The Executive Committee. The Executive Committee is responsible for overseeing medium and long-term strategic planning of the Institute. It will approve the annual budget, the strategic plan and the annual program of activity. On an annual basis it will receive a financial report, an activity report, and an outcome & impact report based on previously-agreed-to benchmarks, to ensure that financial and academic activities are carried out responsibly and appropriately. It will also receive and approve a formal plan for the coming year.

The Executive Committee will meet more frequently than once/year; at a minimum, it will meet twice a year, and otherwise at the call of the Chair. It consists of five faculty members drawn from the University of Toronto, of which three shall be from the Faculty of Information. Members of the Executive Committee shall be appointed by the Dean on the advice of the Director for staggered terms of up to three years; such appointments shall be renewable. The Dean serves as, or appoints, the Chair of the Executive Committee. The Executive Committee shall meet a minimum of once per year at the call of the Chair.

The Advisory Board. Although the Institute is to be housed (as is the PLC today) within the Faculty of Information, the nature of its mandate will mean that extensive collaboration will be essential if the iSchool Institute is to succeed; therefore, additional advice will be required. The iSI Director will chair and be advised by an Advisory Board representative of the curricular areas offered by the iSI and of the organizations typically providing students to, and participation in, the life of the iSchool Institute. The Advisory Board shall meet, at a minimum, once per year, at the call of the Chair. The Advisory Board will be responsible for providing commentary and advice to both the Director and the Dean on possible directions the iSchool Institute could take in the future. The Advisory Board shall consist of a minimum of seven, and a maximum of fifteen, advisors, not including the Director (Chair) or the Dean (ex-officio member). Members of the Advisory Board may be drawn from the University of Toronto or from the broader public: it is anticipated that at least two members of the Faculty will be members. All members of the Advisory Board are appointed by the Dean on the advice of the Director and the Executive Committee for staggered terms not exceeding four years in length.
(E) **Resources**

The iSI will be funded initially through the on-going activities of the PLC, including its reserves from prior years of operation. On a continuing basis, the iSchool Institute will fund itself from its activities.

(F) **Reporting Requirements**

The Director will present an annual report to the Dean, and to the Faculty of Information Council, detailing the previous year’s activities in fulfilling the Institute’s mandate, and financial reports detailing the overall financial picture of the Institute, as well as details on the operations of the iSI during the reporting period. The report as presented must have been previously presented to and accepted by the Executive Committee.

The annual report will include, at a minimum, metrics and benchmarks pertaining to:

- **The number of visitors, meetings, workshops** and other events hosted by, or participated in, by the iSchool Institute, involving participation by the members of the Faculty of Information (including students, post-doctoral fellows, researchers and faculty members), other members of the University of Toronto, and the wider intellectual community and client base.
- **Online Web Resources** and the interest shown in them by the larger iSchool community.
- **Partnerships** established and their results to date, either within the University or the broader community of information practitioners and suppliers.
- Successful **fund-raising efforts**, with attention to sponsors gained for applied research.
- **Recognition** gained in the broader community as a leading thought leader and learning centre for the broader information community, with attention to extension beyond the PLC’s existing base of operations.
- **The number and rate of enrolment** associated with new courses relative to the same data for existing courses.
- Other documentation in support of iSI activities.

(G) **Review**

Assuming approval of this proposal, the Dean will call for an operational and strategic review of the Institute in accordance with the University of Toronto Policy on the Establishment and Review of Academic Programs and Units at the end of its first five years as an EDU:C (during the 2013-14 academic year).