The iSchool Institute
Next Steps: 2012-13
and beyond

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## Contents

Summary .............................................................................................................................. 3  
Introduction .......................................................................................................................... 4  
Mission .................................................................................................................................. 4  
Goals and Objectives: .......................................................................................................... 4  
Activities 2012/2013 ............................................................................................................. 6  
1. Expand offering of successful RM Certificate programs to new locations ............... 6  
2. Develop at least one new certificate ............................................................................ 6  
3. IM and other courses online as webinars ................................................................. 6  
4. The Public Library Leadership Fellows Program ...................................................... 7  
5. KM Master Class .......................................................................................................... 8  
6. Other non-certificate courses .................................................................................... 9  
7. Two new partnerships – open possibility ................................................................... 9  
Planning Beyond 2012-2013 .............................................................................................. 10  
1. Conduct a systematic review of Certificate programs in RIM; long-term strategic planning .......................................................................................................................................................... 10  
2. Continuing Education for the museum/heritage sector ........................................... 11  
3. Public talks/seminars ............................................................................................... 12  
Marketing and Promotion ................................................................................................... 12  
1. Redesign Institute’s website .................................................................................... 12  
2. Revise course and certificate descriptions ................................................................... 12  
3. Revise iSchool Institute website meta-tagging ............................................................ 12  
4. Redesign iSchool Institute’s promotional materials such as brochures, posters and lobby screens .......................................................................................................................................................................... 13  
5. Expand promotion channels ..................................................................................... 13  
Resources .......................................................................................................................... 13  
1. Technology ................................................................................................................ 13  
2. Human Resources ....................................................................................................... 13
Summary

Introduction: The following plan is based on and incorporates most recommendation from the initial Business Plan, consultations with the iSchool Institute stakeholders, discussions with current and possible partner organizations, research, proposals received by the Coordinator, and her knowledge, and experience at the iSchool Institute.

Mission: “Improving Information Practitioners”

The iSchool Institute at the Faculty of Information, University of Toronto is a recognized leader in information, delivering high-quality, innovative and leading-edge continuing education and professional development programs to the local, regional and national information community in all provinces and territories of Canada. The iSchool Institute also supports a public outreach and engagement function of the Faculty.

Activities in 2012-2013 will focus on expanding existing range of educational offerings in thematic scope, delivery format and geographical reach. This will be achieved by offering our well established RM programs in new locations, offering IM and other classroom courses online, developing at least one new certificate (based on already existing courses), proceeding with new partnership possibilities identified in the past months and new ad-hoc non-certificate courses.

The long-term planning for the Institute is addressed by a proposed systematic curriculum review and strategic planning session. Another section outlines possible scenarios for developing continuing education for the museum/heritage sector.

Assessment: Effectiveness of each new course, program and certificate will be evaluated on basis of projected revenues, numbers of registrations and promotional value. Specific measurements are included with each activity description.

Resources:

Technology: A new CMS and dynamic website is essential to support the iSchool Institute current and future activities. It will be designed and implemented by the Faculty of Information IT team in 2012. The Faculty will also assist the iSchool Institute to secure an adequate technology platform supporting webinars and/or other form of online delivery as well as technical support required.

Human Resources: The iSchool Institute team will be re-organized and strengthen to enable efficient delivery of its services and planned expansion.
Introduction

In 2000, the Faculty of Information established the Professional Learning Centre (PLC) – the predecessor to the iSchool Institute - to address continuing education and professional development needs of information professionals and others working in the information-related roles. Its students came from varying education backgrounds and institutions including libraries, archives, records management, information management, web design, information architecture, and other information-related areas in both public and private sectors. The PLC offerings included face-to-face instruction in Toronto and Ottawa as well as web-based courses. On occasions the PLC developed customized training delivered “on-site”. The PLC developed a solid reputation as a provider of high-quality, reasonably-priced, practical and well grounded continuing education and professional development for information-related professions.

Over the years the PLC, a self-funded unit, was successful in meeting its financial obligations to the Faculty: balancing its budget, paying for Faculty’s Information services and resources, remitting a portion of its “profit” to the Faculty and paying for its own staff and instructors out of its earnings.

Continuing education and professional development remain at the core of the iSchool Institute mission. Our mission, more broadly, also includes a public outreach and engagement function for the Faculty.

Mission

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Goals and Objectives:

1. Expand a range of professional education opportunities in Information

   Objectives:

   1.1 Develop new Certificate programs in emerging areas of Information;
The iSchool Institute Next Steps: 2012-13 and beyond

1.2 Revise and update existing Certificates to better reflect evolving needs of the Information profession;

1.3 Offer a dynamic spectrum of non-certificate courses and workshops addressing new and current trends;

1.4 Introduce new models of learning and course delivery i.e. site visits, institutes etc., round-tables etc.

2. Expand the Institute’s presence to all Canadian provinces and territories

Objectives:

2.1 Establish strategic and effective partnerships with local, regional and national organizations and institutions;

2.2 Enhance our offering for distance learners with different models of e-learning continuing education;

2.3 Deliver customized continuing education programs in an “on-site” format for Canada-based clients.

3. Build the Faculty of Information outreach and public engagement program

Objectives:

3.1 Support the Faculty’s outreach initiatives;

3.2 Co-organize regular public events

3.3 Promote the Faculty at all Institute’s events and events attended by the Institute;

3.4 Develop a speaker and public engagement program, featuring members of the Faculty and outstanding practitioners in the information profession

4. Support the Faculty of Information in promoting awareness and recognition of the diversity of the information profession

Objectives:

4.1 Offer courses covering a wide range of skills and knowledge areas;

4.2 Address training needs of the sectors in which the Faculty’s graduates work;

4.3 Create a public forum for discussions of emerging trends and the Faculty’s response and role
Activities 2012/2013

In 2012/2013 planned activities will focus on expanding existing range of educational offerings by thematic scope, delivery format and geographical reach. This will be achieved by offering our well established RM programs in new locations, offering IM and other classroom courses online, developing at least one new certificate, proceeding with new partnership possibilities identified in the past months and new “ad-hoc” non-certificate courses.

The long-term planning for the Institute is addressed by a proposed systematic curriculum review and strategic planning session, and an outline of continuing education for the museum/heritage sector.

The following activities will be implemented in 2012-2013:

1. Expand offering of our successful RM Certificate programs to new locations

Currently, the iSchool Institute offers two Records Management Certificates: RM Fundamentals and RM Practice. Both programs are offered online (at least twice a year) and as 5-day classroom training programs in Toronto (x2) and Ottawa (x2-3). In early 2012 both programs were also offered for the first time in Edmonton.

In 2012-2013 both Certificates will be offered online, in both existing locations, in Edmonton, and in one or two new locations. Discussions with the National Coordinator for ARMA Canada identified several possible sites. Since each ARMA chapter is autonomous in its training decisions – our cooperation will be negotiated with individual chapters.

Timeline: Edmonton: October 2012 and February 2013; new location(s): spring 2013

2. Develop at least one new certificate

The iSchool Institute will develop one or two new certificates:

- Professional Learning Certificate in Social Media - see Certificate Proposal
- Second certificate - we expect that ideas for the second certificate will emerge from the consultation with stakeholders to be conducted in winter-spring 2013

3. IM and other courses online as webinars

The iSchool Institute will expand its online educational offerings. In addition to current multi-week courses offered through the BlackBoard LMS, at least 3-5 shorter courses using a variety of flexible
The iSchool Institute Next Steps: 2012-13 and beyond

Formats will also be added. The iSchool Institute has been receiving inquiries re online versions of our IM courses currently offered only as face-to-face instruction in Toronto and Ottawa. 3-5 of these courses will be offered online using one or more webinar, lecture capture and live webcasting formats.

The Faculty of Information will assist the iSchool Institute with access to such formats already in use (GoToTraining and other) and technical support required.

Requirements in webinar selection:

- Video broadcast. There is value in a face-to-face meeting, even if it is happening over the internet.
- Screen sharing. In order to demonstrate software or share a slideshow, screen sharing is crucial.
- Recording. The ability to store and to replay the webinars is a key feature to realize the proposed course delivery options.
- Plenty of room. Scalability of attendance numbers is critical to accommodating attendance growth, and to ensure the capacity to accommodate all.
- Affordable. The price point for the software with all the features required must be sustainable.

4. The Public Library Leadership Fellows Program

This program will be delivered for the first time starting in the fall of 2012 over 18 months. The first cohort will consist of 20 students.

The Public Library Leadership Fellows (PLLF) Program is an innovative executive leadership program designed by respected library leaders, delivered in partnership by the iSchool Institute at the University of Toronto and CULC/CBUC. As identified at CLA’s 8Rs Human Resources Summit, public library leadership is at a critical crossroads as fewer and fewer candidates posses the mandatory competencies of leadership and managerial skills. The PLLF Program has carefully structured its course offerings to include focused professional development, networking opportunities, executive level mentoring and library site visits.

Structure: Each of the six focus areas will be strategically aligned with a library site visit and will draw on research and case studies focusing on the planning, financial and other associated c-level responsibilities. Program instructors are representative of the industry’s most respected leaders. The
program includes 24 hours of instruction (face-to-face and online), in addition to assigned readings, peer discussion and site visits.

*Focus Area Highlights*

- Leadership in technology visioning, collaboration and implementation including selected legal and regulatory issues pertaining to licensing and other contractual arrangements, emerging service design issues and technology in strategic planning.
- Leadership based on personal strengths including identifying unique personal strengths and recruitment and development of effective teams.
- Issues in human resource development including trends and issues in collective bargaining as well as succession management.
- Issues in finance including budget and capital facilities planning as well as key issues in municipal operating and capital budgets.
- Governance and government relations including recruitment and development of library boards and government relations at the municipal, provincial and federal levels.
- Partnerships, collaborations, and advocacy including development of partnership opportunities, evidence-based advocacy and strategic collaborations to advance mission and equity.

Detailed Project Plan is available

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### 5. KM Master Class

Gordon Vala-Webb, a KM leader with over 12 years of experience in both the private and public sectors, will lead a small group of practitioners through an intense, shared, interactive, experience that will give you an KM action plan for your organization and new skills and capabilities as a KM leader. In addition, Gordon will provide one-on-one coaching for participants (up to a maximum of 4 hours each).

*Target Audience:*

KM practitioners living within 50km of downtown Toronto who:

1. have at least 3 years of KM-related work experience (or combined with some graduate-level training);
2. is currently leading / managing KM efforts at least at a team level
3. is recently in, or has a career plan to become, a CKO/Director/KM Lead within the next 3-5 years

In this initial offering the class will consist of 4-8 participants who are experienced KM practitioners looking to take their organizations, and themselves, up to the next level. Participants will be expected to
complete readings ahead of each class, present their own thinking on topics, and to actively participate in discussions.

Instructor(s) bio with related experience:

Gordon Vala-Webb helps leaders of organizations to improve their business results by transforming how their people collaborate, innovate and share what they know. He is an award-winning collaboration and knowledge thought-leader and practitioner with 12 years of experience working in large / complex public- and private-sector organizations. Previously he was National Director of Knowledge Management for PwC Canada. He was also the Design Workstream Lead on PwC's global project to create a social networking platform to bring together 165,000 PwC staff and partners. Prior to joining PwC he was Director of Knowledge Services for the Workplace Safety and Insurance Board (Ontario). He currently is chair of the Board of Directors of North America’s largest provider of occupational health and safety consulting and training services: Workplace Safety Prevention Services (WSPS).

Teams he has led have been recognized through awards such as the NN/g Top Ten Government Intranets and the IIR Best Portal, Content and Collaboration Excellence Award. Gordon is frequently asked to speak at conferences and other events in both North America and Europe. He has a MA (Politics) from Queens and a Masters in Management Science (Technology) from the Faculty of Engineering at the University of Waterloo. He is also certified as a Human Capital Strategist (HCI).

6. Other non-certificate courses

The iSchool Institute will offer a range of new non-certificate courses in emerging area of interest. Some will be offered only once or few times in response to current developments, needs or legislation - an example of such course is Copyright: What’s New? – a half-day workshop offered twice this fall. As non- certificate, ad-hoc courses, there will be no investment and no development cost to the iSchool Institute. Some of these courses may become part of existing or new certificates.

Details are available.

7. Two new partnerships – open possibility

In the past few months a possibility of two new partnerships has emerged. At this point no decision has been taken whether the iSchool Institute will pursue either (or both) of them. However, both options remain open.

Details are available.
Planning Beyond 2012-2013

The iSchool Institute will initiate the following activities in 2012-2013 with an objective of developing a long-term strategy for the Institute.

1. Conduct a systematic review of Certificate programs in RIM; long-term strategic planning

Records and Information Management have been at a core of the educational offering of the iSchool Institute (and previously PLC) - since its inception. Currently the Institute offers two Records Management Certificates (Fundamentals and Practice) and Information Management Certificate in Toronto (last revised in 2009) and Ottawa (a hybrid of old and new -post 2009 courses).

The following points which emerged from research and discussions with the stakeholders determine the proposed systematic program review and strategic planning process for the iSchool Institute:

- RM courses are aging – content needs refreshing; content of some RM and IM courses overlap
- Certificates need to reflect emerging trends and directions i.e. information governance
- There is a large discrepancy between requirements to complete RM (30h) and IM (108h) Certificates
- Market needs are changing – may be less emphasis on basic training
- Government initiative to have all departments compliant with GC Docs document management
- What and where are the markets (and stakeholders) and what exactly do they need?

Emerging ideas for new Certificates and their content programs as well as stand-alone courses must be identified with the key market and other stakeholders within the industry. The Institute needs to learn more about the market, and a strategic planning session to set long-term direction.

The iSchool Institute proposes a two-fold approach:

Focus Groups

Who?

Participants in 5x2h focus group sessions: 10-15 people each

1 facilitator/note taker (may be able to get some time free to lessen the cost)

In Toronto: ARMA Toronto Chapter representatives from major corporate RIM programs and government leaders; former students of the IM and RM Certificates; RM and IM instructors; iSchool Faculty members and the iSchool Institute Advisory Committee
In Ottawa: individual meetings/focus groups with representatives of major stakeholders in RIM; ARMA NCR representatives from government and corporate entities

_Timeframe:_ 4-6 weeks upon approval

**Strategic Planning Session**

1 ½ to 2 days session for vision, mission, action steps. Report from the session would identify key deliverables, time frame, measurable goals, and action items.

Detailed budget for both Focus Groups and Planning Session is available.

### 2. Continuing Education for the museum/heritage sector

The museum/heritage sector already has a number of professional education players, and how the iSchool Institute works with them or beside them, how we collaborate or compete, is very important.

Thus the Ontario Museums Association, the Ontario Association of Art Galleries, the Ontario Historical Society (just to start) plus the Universities and colleges engaged in offering all or part of the related subjects in a MS curriculum should be considered and perhaps collaborations negotiated. Resources are scarce an about to be scarcer by all report, working together will be the future for the subjects of the mid-career or advanced territories of this workforce.

There are some parts of the approach that can be delivered in collaboration, if not at least in consultation, and part which could be unique to Museum Studies and the Institute.

**Questions/Issues:**

- Are the existing programs sustainable- given cutbacks in formal education?
- Adaptability- often programs within formal education become static and difficult to renew
- Evaluation- what are the outcomes of these programs- little evaluation done
- Relation to needed knowledge, skills, attitude competencies- unknown.

**Options:**

I. Conservative: a series of one-offs- talks, workshops, colloquia

II. Middle of the Road: plan for a more extensive set of offerings through 2012-2013, beginning with I and at the same time starting a consultative process with some leading thinkers in the Southern Ontario area as to what is needed, desired, and possible as to mid-career and advanced offerings.

III. “Go For it”
The iSchool Institute Next Steps: 2012-13 and beyond

Decide to develop some sort of advanced degree related to museum and heritage management and start to put the pieces together related to curriculum, Faculty, resources, etc. The Public Libraries Leadership Fellows program model could stimulate some discussions here.

**Future Steps:**
Offer the first two workshops in late fall or winter 2013 while planning the more ambitious step of a CE or related program. This would allow to meet with stakeholders, both individually and perhaps in a focus group and even consider some funding options.
Requirement: ability by the Faculty and its IT to help deliver it in advanced hybrid modes. Otherwise need to seek partners.

3. **Public talks/seminars**

Consider a possibility of organizing a series of public seminar/talks etc. Any future program would be contacted-out to a specialized firm/group.

Two models for delivery of similar series are available.

**Marketing and Promotion**

1. **Redesign Institute’s website**

Under development – projected completion December 2012

2. **Revise course and certificate descriptions**

Retain a writer to re-write the descriptions of the certificates and courses to appeal to a broad range of those involved in information-intensive work. It needs to be kept in mind that the descriptions are really marketing materials, and if potential students cannot quickly understand the scope and cost of a certificate, they will leave the site.

3. **Revise iSchool Institute website meta-tagging**

Engage Faculty students to tag the Institute’s web pages appropriately to ensure that potential students searching for continuing education or professional development opportunities in the field of information management, knowledge management or any of the other key streams offered – whether their interest
The iSchool Institute Next Steps: 2012-13 and beyond

is for an in-person course or a course delivered virtually – will be directed to the Institute within the first 5 Google hits.

4. Redesign iSchool Institute’s promotional materials such as brochures, posters and lobby screens

Under development

5. Expand promotion channels

Existing promotion such as the Institute’s mailing list, postings to listservs and limited use of social networking media i.e. Twitter and FB – will be complemented by new promotion channels – i.e. more extensive use of social media, outreach to specialized groups, cooperation and agreements with associations re promotion to their membership. A stronger relationship with the FIAA will be pursued as it could offer another very efficient mechanism for promoting programs.

Resources

1. Technology

A new CMS and dynamic website is essential to support the iSchool Institute current and future activities. It will be designed and implemented by the Faculty of Information IT team in 2012. The Faculty will also assist the iSchool Institute to secure an adequate technology platform supporting webinars and/or other form of online delivery as well as technical support required.

2. Human Resources

The iSchool Institute team will be re-organized and strengthen to enable efficient delivery of its services and planned expansion