Subcommittee of the Information Services (IS) Committee to
Examine Options for Implementing Recommendation 7.1 of the Task Force on Strategic Directions for
Information Services (TFIS) Report

Report to the Information Services Committee
January 2014 Meeting

A. Background:
The Information Services Committee struck a subcommittee to “examine options for implementing recommendation 7.1 of the Task Force on Strategic Directions for Information Services (TFIS) Report” with a mandate to: (a) consult broadly within the iSchool community; (b) examine and report on mechanisms for implementing Recommendation 7.1; (c) advise Information Services on the use of resources to hire a leader for the iField Institute; and (d) prepare a report for the December 19 meeting of the IS Committee (see Appendix I).

The following report incorporates Subcommittee deliberations across meetings held November 18 and 25, and December 2 and 9, 2013. The recommendations build on a number of working assumptions, and include a governance mechanism and timelines for moving forward over the next calendar year.

The Subcommittee recognizes that there are neither single nor simple solutions to implementing TFIS recommendation 7.1 in whole or in part. Nonetheless, the Subcommittee believes unequivocally that the iSchool currently boasts two valuable assets, namely, Information Services (Inforum and IT Services), and the iSchool Institute, that can be leveraged to achieve greater profitability while also supporting core teaching and research initiatives of the Faculty.

The report acknowledges that the work of this Subcommittee is complementary to that of the Task Force on Strategic Directions for Information Services. Consequently, recommendations regarding implementation of TFIS Report recommendation 7.1 (see Appendix II) are intended to supplement the TFIS report, and not to distract from, or supplant any other sections or recommendations in the TFIS Report.

B. Working Assumptions of the Subcommittee:

1. The Subcommittee pursued its mandate recognizing that funding to hire the Executive Director recommended for the iField Institute in the TFIS Report (7.1.2; 7.1.3; 7.1.4) is unlikely at this time to come either from further cost cutting (expense reduction), or from the iSchool operating budget. Consequently, the Subcommittee determined at its first meeting to focus on mechanisms for generating “soft money” revenue – at least until such time as the fiscal landscape changes favourably.

2. The Subcommittee focused on revenue-generating initiatives to support the hiring of an Executive Director with the understanding that failing to consider their implementation would represent a lost opportunity. For example, capital budget spending is currently constrained by not having an Executive Director of the proposed iField Institute to advise and oversee renovation projects targeted towards Information Services (Inforum and IT). Likewise, targeted teaching and research-related innovation associated with income generation (as well as with the iSchool Strategic Plan) requires the kind of planning, management and oversight that the TFIS report envisioned in its Recommendation 7.1.3. Bluntly put, the Subcommittee was acutely aware that one has to spend money to make money, and without an Executive Director in place, opportunities for advancing the strategic plan, for implementing the TFIS Report, and for putting
in place mechanisms for revenue generation continue to be lost. There is an enormous opportunity cost to doing nothing.

3. The Subcommittee recognizes that the quality “brand” that has been steadily built by, and recognized in association with, Information Services (Inforum and IT), and the iSchool Institute, respectively, is also being eroded by continuing underfunding and a lack of strategic direction that an Executive Director can provide. To preserve the level of excellence that has been acknowledged by those who have directly benefited, as well as in reports from ALA and OCGS accrediting bodies, requires timely intervention before reputation is lost.

4. The current consideration of opportunities for transferring the delivery of some ISI professional development programs to the University of Toronto School of Continuing Studies (SCS) represents an opportunity to have SCS assume responsibility for the high-overhead, infrastructure-intensive activities of registration, marketing, course catalogue production, and ongoing course-related inquiries (and assuming some financial risk) while freeing up ISI staff resources to concentrate on customized programming that has lower overhead some potential for income generation. The Subcommittee conducted its deliberations keeping the possibility for such an iSchool-SCS partnership agreement in mind.

5. The Subcommittee understands that, while the salary line allocated to the Director of Information Services (i.e., Cox) has been redirected to deficit reduction, the actual position remains protected.

6. The Subcommittee would want to have assurances that whatever revenues resulted from the implementation of any income-generating initiatives recommended in its report be protected within the budget of the combined Information Services (Inforum and IT S) and iSchool Institute, administrative unit (referred to in the TFIS Report as the iField Institute) rather than being redirected to deficit reduction.

7. The more promising opportunities for revenue-generation come from having the current iSchool Institute (ISI) folded within the current Information Services (Inforum and IT) administrative unit, as also recommended in the TFIS Report (recommendation 6.1).

8. The Subcommittee recognizes the value of targeting short-term “wins” that will be fundamental to securing some initial revenue as a base on which to support future and ongoing income-generation. These are indicated within an outline of proposed phasing of each the recommended initiatives as “immediate”, with short term, medium term, and longer term representing subsequent timeframes for rollout. This phasing in strategy is also consistent with recommendations outlined in the TFIS Report.

C. Framework for determining viable directions for proceeding:

1. At its second meeting, the Subcommittee came to a determination of three priority-enabling areas on which to focus – each consonant and aligned with strategic directions of the iSchool, and each potentially revenue-generating to a greater or lesser extent:
   a. Brand-value, i.e., rebuilding and strengthening the brand of the iSchool, generally;
   b. Revenue-generating initiatives;
   c. Other or soft-funding opportunities for generating income.

D. Other considerations relative to the Framework and its Implementation:

1. The Subcommittee defines “continuing education” (CE) as being the mechanism for addressing/redressing gaps in ones (job-related) knowledge. CE might appropriately be associated with the idea of ongoing “training”. These are curricular opportunities that might best be sustained by the School of Continuing Studies. Examples of courses suited to continuing
education might include learning particular software, technical skills development, certificate courses currently in the iSchool Institute catalogue, etc.

2. The iField Institute is focused strategically on “leadership in our profession” (whatever that information-focused profession might be). The iField Institute concerns itself with “the next big idea in the information discipline”. It is responsive to change. Through agile programming and curricular innovation it demonstrates its commitment to career-building, to anticipating big shifts and the need to reorient and educate prospective and current information professions – whatever their stage of career – to be prepared for the requirements associated with those shifts. The iField Institute focuses on programs, curriculum, and pedagogy customized to the information discipline. “Boutique” initiatives, such as the Public Library Leadership program, or the Maker-Spaces workshop would be examples falling under the iField umbrella.

3. While the Subcommittee sees distinctive curricular roles and responsibilities for the School of Continuing Studies, and the iField Institute, respectively, we also see opportunities for the latter to assist in bringing (ideas for) courses and players to the former. As “next big ideas” become mainstream, for example, it may be more appropriate to shift perspective from education-as-orientation (iField Institute) to ongoing training (SCS). The iSchool has access to a pool of highly qualified and experienced information professionals who could be players in SCS continuing education courses as such shifts occur.

Table 1 – Proposed Initiatives Categorized by Priority-enabling Area

<table>
<thead>
<tr>
<th>Brand-value building (consistent with building the brand; revenue potential more limited)</th>
<th>Revenue-generating (potential for generating revenue higher than for other two areas – at least in the short term)</th>
<th>Other (soft funding) for Income generating (likely longer term potential; will require work-up as not currently in place)</th>
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<tbody>
<tr>
<td>Partnerships with others (e.g., Dysart &amp; Jones)</td>
<td>Boutique programs (e.g., Public Library Leadership)</td>
<td>Fund-raising (targeted)</td>
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<td>“Latest ideas” – e.g., Flip classroom pedagogy; “Big ideas”, e.g., Crowdsourcing</td>
<td>Offering courses to other departments, constituents on campus (RMcE and UTM, for example); rolling out Cite It Right workshops to all of UofT perhaps through Academic Integrity office; can also target and customize to specific professional backgrounds and practices, e.g., legal, medical; can also target sectors of information professionals on campus and beyond</td>
<td>Research funding – encouragement to secure grants that include overhead (e.g., NSERC); grants where student and technical assistance salaries covered – could be directed to “research and IT support service” offered/ maintained within iField Institute (research project support – SSHRC; others); targeting “asks” to cover some aspects of research support</td>
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<td>Thematic symposia (e.g., Surveillance; Copyright; other headlines)</td>
<td>Percentage of revenue from iSI-SCS partnership agreement (dedicated to iField Institute)</td>
<td>Contract research – up to 40% overhead</td>
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<td>MOOCs</td>
<td>Subscriptions to chunks of content (online) – leading-edge research</td>
<td>Consulting services</td>
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<td></td>
<td>Working with FIMS, UofOttawa to</td>
<td>Room rentals – rooms for which</td>
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<td>also make good use of information professional clusters</td>
<td>iSchool has sole responsibility; also make rooms available on Central Booking “rental list” for which we receive a percentage of the fee</td>
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<td>Webinar of boutique programs – e.g., 3-D printing webinar; using eye-tracking hardware for research webinar; etc.; suggestion that iField Institute offers a competition for content, i.e., “Create a Webinar” with winning student(s) having their webinar offered by the iFI and some share in revenue</td>
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<td>iSkills workshops (small fee beyond certain number for students? fee-based for non-students?)</td>
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<td>Partnership agreements with professional associations to co-sponsor programs or to co-market specific professional programs</td>
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<td>Contracting out of Symposia with someone who has already prepared and offered a program, e.g., “Hot Topics in Libraries” offered by Dysart &amp; Jones; iSI currently provides some registration support for negotiated % cut – a useful model for modest investment with good yield</td>
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<td>Online “product”, e.g., Taxonomy Guide – fee or, if advertising and/or sponsorship obtained, then free (or a mix)</td>
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<td>Specialty workshops for students – sponsored by TechFund (e.g., Code Rally)</td>
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<td>Other?</td>
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E. Proposed Phased Roll-out:

**Immediate – quick wins (launched within next 6 months)**

- Skills-oriented courses for UTM – budget and approval already in place
- Cite-It-Right workshops – already developed; market to UofT
- Boutique programs
  - Public Library Leadership (in place for 2014)
  - Symposia partnerships (Dysart & Jones) – “hot topics”
  - Specialty topic webinars – have content; webinars to be developed/produced
  - Thematic symposia (e.g., Surveillance; Copyright; other headlines)
- Partnership with School of Continuing Studies
- iSkills workshops – market also to non-students
- adding iSchool rooms to Central Booking “rental list”

**Short term – launched within 7-12 months**

- Online “product” – updating of any already available – securing co-sponsors and/or advertising
- competition for “Create a Webinar” content
- rolling out Cite-It-Right workshop more broadly beyond UofT; targeted content development
- Museum Leadership program
- iSkills workshops open to non-students for a fee

**Longer term and ongoing**

- identification and development of online “product”; boutique programs; webinars; thematic symposia
- making available cutting-edge topic-specific research and other information on subscription basis – identify target markets, develop, offer
- identifying other partners (other academic partners; information clusters; professional associations; etc.) with whom to develop and offer continuing professional development programs
- targeted “asks” in grants; fund-raising initiatives

F. Implementation: Immediate resource requirements

- Develop a small oversight/management group (recommended membership: ISC Chair, Manager Strategic Planning, one faculty member [Subcommittee Chair is one possibility for continuity], with ISI Interim Director and Instructional Outreach Librarian as assessors/advisors) with a limited-term (12 month) mandate
- Immediately engage ISI and Information Services in working together (e.g., registration and charge system)
- Pending outcome of SCS and iSchool negotiations, determine next steps for absorbing ISI staff within the iField Institute
- determine appropriate engagement of student assistants to support initiatives, as appropriate
- establish ad-hoc advisory groups within targeted topic areas (e.g., developing program for Museum Leadership boutique program)
Appendix I
Terms of Reference of the Subcommittee to Examine Options for Implementing Recommendation 7.1

Subcommittee of the Information Services (IS) Committee to Examine Options for Implementing Recommendation 7.1 of the Task Force on Strategic Directions for Information Services (TFIS) Report

Terms of Reference

Whereas the Task Force on Strategic Directions for Information Services Report (TFIS Report) in item 7.1 Governance, Leadership, and Management recommends that: the governance accountability of the iField Institute be through the IS Committee; the primary administrative accountability be to the Dean through the head of the iField Institute; and, a full-time leader is required to determine strategies and priorities in order to fulfill its mandate; and

Whereas at the May 22, 2013 meeting of the IS Committee, a motion was passed indicating that the IS Committee endorse the TFIS Report and that the IS Committee be tasked with overseeing the implementation of the TFIS Report; and

Whereas at the May 27, 2013 Special Meeting of Faculty Council, a motion was passed to endorse the TFIS Report;

Whereas at the September 19, 2013 meeting of the IS Committee, the Dean indicated a desire to hire a full-time leader for the iField Institute but indicated financial and operational barriers to doing so,

Be it resolved that a Subcommittee of the IS Committee be struck to Examine Options for Implementing Recommendation 7.1 of the TFIS Report

With a mandate to:

a. consult broadly within the iSchool community,
b. examine and report on mechanisms for implementing Recommendation 7.1,
c. advise Information Services on the use of resources to hire a leader for the iField Institute;
d. prepare a report for the December 19 meeting of the IS Committee

And a proposed Membership of:

- Susan Brown
- Andrew Drummond
- Lynne Howarth (Chair)
- Rhonda McEwen
- Mike Ridley
- Kim Silk
- Elisa Sze
- Eva Piotrowski
- Student representative TBD

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Appendix II

Task Force on Strategic Directions for Information Services
Faculty of Information, University of Toronto
Final Report
May 22, 2013

Excerpt of Recommendations 7.1.1 through 7.1.8

ENABLING RECOMMENDATIONS
The following recommendations are foundational to the overall transformation of Information Services into the iField Institute and are prerequisites to the success of the plan outlined in this report.

7.1) Governance, Leadership, and Management

7.1.1 Recommendation: The primary governance accountability for the iField Institute should be through a renamed Information Services Committee of Faculty Council.

7.1.2 Recommendation: The primary administrative accountability should be to the Dean through the head of the iField Institute. The governance and administrative accountabilities need to be clearly separated.

7.1.3 Recommendation: The iField Institute requires a full-time leader to determine strategies and priorities in order to fulfill its mandate. This person should be an academic and be hired following existing policies regarding appointments at the University of Toronto. This leadership role should be considered a senior manager within the Faculty and should report to the Dean.

7.1.4 Recommendation: The head of the iField Institute should be designed as an Executive Director to communicate, both internally and externally, the nature of this leadership role. This position should be filled with an individual with demonstrated expertise in libraries, memory institutions, information technology, and academic innovation. The Executive Director will be an accomplished administrator who will lead the transformation of Information Services and the iSchool Institute into the iField Institute as outlined in this report. The Executive Director will be expected to teach in the MI or MMSt program.

7.1.5 Recommendation: The IT vacancy (Senior IT Administrator) should be used to hire an IT Project Manager. This individual will have a strong technology background and also the ability to identify and solve problems using IT and by enabling partnerships or contractual arrangements with external groups or services. All IT staff in the iField Institute will report to the Executive Director.

7.1.6 Recommendation: The budget allocated to the iField Institute should be clear and under the control of the Executive Director to enable multiyear planning, technology
evergreening, project support, and seed funding for pilot initiatives.

7.1.7 Recommendation: The Executive Director should form an external advisory group (with representation from UTL, ITS, and other partners or opinion leaders beyond the University).

7.1.8 Recommendation: To the greatest extent possible the "Library" and "IT" components of the current Information Services should be integrated into a single service with a common strategic plan and vision.