The iSchool Institute — Report for Faculty Council 14.10.2011

I  Introduction

The purpose of the iSchool Institute is to operate continuing education programs for information professionals, and to increase the public outreach of the iSchool to the broader public community of Toronto.

Director’s Statement/Executive Summary:
Demand for our core offerings is holding up. We continue to expand the curriculum. We have started to settle into a rhythm capable of sustaining higher concurrency than before (we recently operated three concurrent classes on a single day without incident) following upon Marcia Chen’s medical leave and the need to make up for her embedded process knowledge. We are making slow but steady weekly gains via social media, but are finding we have more to learn about marketing. This year sees the beginning of our transition from looking for growth via new offerings alone, and more collaborations and partnerships to be developed, which we hope will provide a regular revenue base in future years.

As of this report, we are doing moderately well, with revenues better than last year, and running ahead of expenses by a small amount. Our goal for this year is to end in the black and begin to pay back last year’s losses.

II  Previous Year

Activities
2010-11 saw a six speaker lecture series offered, with topics in learning strategies, corporate information use, traditions and institutional change, privacy, the state of museum leadership and resilience.

We were able to complete 2010-11 with a corporate contract in British Columbia for custom education ($5,000 revenue for a one-day program).

Programs:
We undertook to schedule and publish the Fall 2011 calendar early and were rewarded with higher revenues than 2010-11 as a result of the earlier availability of information than in prior years.

Primary certificates are in Information Management (2 versions, one for Toronto and one for Ottawa, due to differences in instructor availability and lab time), Records Management (2, Fundamentals and Practice). The Managing Information Organizations certificate was withdrawn after the 2010-2011 year; selected courses from this certificate continue to be offered. The Certificates in Legal Research on the Web and in Web Search Strategies continue to be offered.

We were able last year to offer 20% new/revamped offerings, although take-up of some of these was not satisfactory.

We offered the first course in our Intelligence Analysis program during 2010-2011 and are working to find instructors and develop the rest of the Intelligence Analysis Certificate with some elements to be made available in Winter 2012.

Grant Applications – N/A. We did look at applying for the Strategic Partnerships grant from Canadian Heritage but did not submit as the required partnerships were not fully developed.

Articles Published – N/A.
Collaborations – N/A.

Personnel:
Eva Piorkowski, Coordinator — has done an excellent job during the past year in scheduling courses, keeping records and processes in order, supervising and training Libby Trimble.
Cheryl Pasternak — 40% part time, has handled accounts payable and instructor payments for the Institute, coordinated production of the catalogue.
Libby Trimble, UTemp — handled student enquiries, handles accounts receivable, primary person for classroom setup and breakdown, coordination of printing, shipping and catering.
Marcia Chen — on Long Term Disability, not expected to return in the near future.

III Objectives/Plans for upcoming year

Key Priorities:
Public Outreach: 2011-12’s first lecture was given by Bruce Stewart, “Uncertain Flow”, in September (managerial lacunae in information & knowledge use). Bruce will give the second talk in October as well, carrying this theme forward with “Facing the Maze”, on the challenge of organizing and presenting information for decisions. The November speaker is still to be selected. Stephen Abram has been asked to give the January 2012 lecture, speaking about public libraries.

External Events: Bruce Stewart and Uri Shafir are submitting a presentation proposal to the CNI Conference in December 2011 (Washington, DC), in support of finding further markets for the Concept Science certificate programs.
Bruce Stewart will be the keynote speaker at the Infonex Managing eRecords & Information in the Public Sector Conference, Ottawa, January 17-18 2012, “Structure After the Fact”.

Collaborations: Working with: Canadian Urban Library Council, Hamilton Public Library and Grimsby Public Library to develop a program for urban libraries. ThingTankLabs for the new Design Certificate. Royal Ontario Museum and Ontario Science Centre to develop further elements of the Museum Leadership program. Canadian Council for Information and Communication Technologies to develop a certificate in Business Technology Management. Canadian Association for Security and Intelligence Studies to shape the Intelligence Analysis Certificate. Ryerson University: in-kind contribution to the establishment of a conceptual thinking lab grant application.

Possible Partnerships: We’ve been approached by the Oncken Corporation about partnering to deliver their programs in Toronto (Managing Management Time & derivatives), and by Cognitive Edge Pte to deliver their accreditation and certification programs here, plus develop related materials for the Cognitive Edge global network as they’re looking for advanced content. A number of other institutions have expressed interest in periodically operating the Conceptual Curation and Pedagogy for Conceptual Thinking programs with us in the future (licensing and/or joint operations).

External Commitments: working with Skills Edge Training Institute, Lagos, to run a custom offering of the Records Management curriculum with some added content for academic record keeping in December ($35,000 revenue potential). Working with Kibbutzim College, Tel Aviv, Israel, to offer the Conceptual Curation and Pedagogy for Conceptual Thinking as a part of their regular teacher training program on a continuing basis. Bruce Stewart is part of the steering committee designing the agenda for the 2012 Information Management & Archives in the Public Sector (IMAPS) Conference for the Ontario Government.

Courses and certificates: Priorities for new development include completion of the Intelligence Analysis offering, aimed at the commercial sector. Conversion of the pre-project risk, architecture and governance materials created last year for INF 2040S to continuing education courses for a new certificate “From Idea to Project”. Start instructor search and development work on “Business Technology Management”.

Ongoing Programming:
Course scheduling for the Winter 2012 term is now underway. We published the Fall 2011 schedule several weeks earlier this summer and have been rewarded with higher revenues

Primary certificates are in Information Management (2 versions, one for Toronto and one for Ottawa, due to differences in instructor availability and lab time), Records Management (2, Fundamentals and Practice). The Managing Information Organizations certificate was withdrawn after the 2010-2011 year; selected courses from this certificate continue to be offered. The Certificates in Legal Research on the Web and in Web Search Strategies continue to be offered.
New for Fall 2011 are two Concept Science certificates (Conceputal Curation for Librarians and Pedagogy for Conceptual Thinking), a joint certificate with ThingTankLab in Designing for the Internet of Things, and a certificate in Museum Leadership & Development for first and second level managers and team leads. The goal is to again in 2011-12 offer 20% new or revamped material.

Budget statements 2010-11 actuals and 2011-12 projected:
We finished 2010-11 with a loss and had a carry forward of $125,865.33 to discharge in this fiscal year. The loss is due to investments made toward new programs, speakers for the lecture series, and an analysis of our technology.

2011-12: As of 30 September 2011: Budgeted revenue of $690,000. $219,282.28 received and posted to date. This is a little ahead of 2010-11 and in line with 2009-10. Expenses for the year are budgeted at $564,134.67 plus reduction of the carry-forward loss from the previous year of $125,865.33 (total, 690,000.00). Expenses to date are $217,598.15 (including commitments known throughout the balance of the year). We have (at this point) $1,684.13 revenue in excess of expenses to this point.

Unplanned: we have received a notice from IT Security that our database is able to be easily compromised. This is due to the age of the registration and tracking application used. The Inforum’s IT team have looked at alternatives to replace this, but the projected cost is too much to anticipate covering in this fiscal year (> $100,000). We are devoting extra effort to verifying our registration database in the interim.

IV Plans for 2012 and beyond

We anticipate that in 2012-13 we will need to refresh our Records Management offering; beyond that we will likely concentrate more on partnerships and “franchising” of our offerings as turn-key continuing education offerings for other iSchools or Faculties of Information Studies. We are anticipating that 2012-13 will be a difficult year in the global and Canadian economies and thus will be looking at that point to constrain expenditures, both to reflect a probable cut-back in training by the organizations using our services, and to allow us to replace our registration system.

Bruce Stewart
Director
The iSchool Institute