Section 1: Background

The central mandate of the Task Force on Strategic Directions for Information Services was to "oversee and coordinate an action plan for the future shape and services of the Inforum and Information Services."

The Task Force conducted broad consultations with faculty, students, staff, campus partners, alumni, and external opinion leaders. It analyzed the current state of Information Services with respect to such issues as priorities, capacity, budget, and usage. It also explored key challenges and future opportunities.

Unlike almost every other discipline, information is not a service to the Faculty, information is the very work of the Faculty. Information Services should not be just a support service; it is, and should be, at the core of everything the Faculty does.

Information Services, comprised of the Inforum, library services, and information technology services, is widely viewed as the heart of the Faculty of Information. The resources, services, and expertise of this unit are highly regarded by faculty, students, staff, and alumni. However, the growing size, diversity and breadth of the Faculty have placed new needs and demands on Information Services. The Faculty Strategic Plan charts an important and ambitious future that requires innovative leadership from Information Services.

Just as the Inforum re-conceptualized the former Faculty library, it is now time to reshape Information Services into an incubator of ideas and interaction. Information Services must move from being a model library and an IT support service to an experimental and experiential platform for exploration and discovery. Information Services has already moved in this direction but it has struggled with too few resources relative to its many priorities. It can, and must, continue to be the heart of the Faculty. By refocusing and realigning, Information Services can further enhance its participation in the life of the Faculty and in the lives of the extended communities associated with the Faculty.

The Faculty of Information is well positioned to continue to lead as an innovator in the iField (the disciplines and the professions involved in the convergence of information, technology, and people). By creating a dynamic, cutting edge incubator and collaboratory, unlike anything in North America, the Faculty can leverage and maximize this advantage to further its strategic directions.
Section 2: Vision

The iSchool Strategic Plan 2012-2017 calls for dramatic developments and innovations in five key areas:

<table>
<thead>
<tr>
<th>Innovate</th>
<th>Lead in innovative scholarship to transform society and scholarship.</th>
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<tbody>
<tr>
<td>Inspire</td>
<td>Enhance our international renown for life-long, enquiry-centered education.</td>
</tr>
<tr>
<td>Shape</td>
<td>Shape the social space of information and support sustainable growth.</td>
</tr>
<tr>
<td>Lead</td>
<td>Nurture leaders who contribute to enabling society to realize the positive social benefits that information makes possible.</td>
</tr>
<tr>
<td>Enrich</td>
<td>Enrich our environment and culture for study, research and work.</td>
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Achieving these objectives requires an integrated approach by the Faculty to create a profound and far reaching learning plan for students, alumni, and the larger iField community, and to support an innovative research agenda addressing the most significant issues of the information field in contemporary society.

By re-imagining Information Services as an experimental incubator as well as continuing its role as a core service provider, the iSchool can leverage existing investments to create a transformation capacity that will further the strategic plan and become a magnet for innovation and external engagement.

Key to this transformation is exceptional leadership and the determination of the Faculty of Information to integrate Information Services as fully as possible into its teaching, learning, research, and service objectives at both the St. George and UTM campuses.

This report consists of six key transformational recommendations, supported by a series of tactical recommendations that advance specific changes, and enabled by a set of foundational recommendations that provide oversight and sustainability:

1. The Inforum & Information Services: Enablers of Exploration, Experimentation, Incubation & Laboratories
2. Curriculum & Co-curriculum: Coordination, Alignment, & Relevance
3. Digital iSchool & IT Innovation: Presence, Cloud, On-Demand, Research Support & Toolkits
4. External Communities: Building Partnerships & Engagement
5. Efficient Operations: Standardizing & Streamlining Core Services
6. Synergy & Innovation: Merging Information Services & the iSchool Institute
Section 3: Recommendations

KEY TRANSFORMATIONAL RECOMMENDATIONS

1. Inforum & Information Services: Enablers of Exploration, Experimentation, Incubation & Laboratories

Recommendation: The Inforum and Information Services should be refocused as a platform for exploration and experimentation with different models, new ideas, innovative technology, and emerging trends. This incubator or collaboratory approach should allow faculty and students to fulfill academic objectives as well as attract interest and involvement from external groups that align with Faculty directions.

2. Curriculum & Co-curriculum: Coordination, Alignment, & Relevance

Recommendation: Information Services provides an extensive array of co-curricular learning opportunities (e.g. workshops, online resources, and classroom based instruction) as do other groups within the Faculty (e.g. the iSchool Institute, peer-led workshops, research institutes) and on campus (e.g. University of Toronto Libraries (UTL), Information + Technology Services (ITS)). By coordinating these initiatives through common branding, scheduling, and curriculum mapping, the co-curriculum initiatives can become more aligned with the academic programs and more accessible to students, alumni and members of the community.

3. Digital iSchool & IT Innovation: Presence, Cloud, On-Demand, Research Support, & Toolkits

Recommendation: There is a need for a more concerted, Faculty-wide engagement with and ownership of its digital and social media identity. Maximizing the value of the web, social media, and other digital outreach and communications tools is essential to the success of the Faculty. The use of these tools, and the community engagement around them, must be focused by strategic objectives and delivered through tactical implementations. Since a broad range of diverse groups must be involved in these initiatives, coordination is needed to align the strategy and ensure delivery. A vibrant, compelling, and useful digital presence should reflect the position of the iSchool as a leading academic institution exploring the intersection of people, information, and technology. This requires sourcing and utilizing the best available technology and exploring emergent technologies. Information Services cannot do this by themselves, but they can be an integrator and a conduit for these ideas and innovations.

4. External Communities: Building Partnerships & Engagement

Recommendation: As the iSchool grows in size and diversity, it must also expand its ability to reach out and engage with external communities. Currently the Faculty is less a community than a series of communities that overlap occasionally. Information Services (and specifically the Inforum) can be positioned as a place for active investigation and experimentation with an interdisciplinary focus. It can be a place to forge internal and external partnerships. Information Services can operate as a portal (both physical and virtual) to connect the Faculty
to the U of T community; in particular, the University of Toronto Libraries (UTL) and central Information Technology Services (ITS), iSchool alumni, and external partners (such as information vendors and public agencies). This will create a common place for these groups enabling active, engaged collaboration, co-creation, and co-development.

5. Efficient Operations: Standardizing & Streamlining Core Services

**Recommendation:** Information Services is pulled in many directions and attempts to respond with many services and resources. Given existing funding and current staffing, this is unsustainable. Better governance and new leadership needs to forge additional alignment around key priorities; central to this will be making choices about what to stop doing. In addition, Information Services should adopt as many centrally provided services as possible (in particular those from UTL and ITS).

6. Synergy & Innovation: Merging Information Services & the iSchool Institute

**Recommendation:** Information Services and the iSchool Institute should be merged into a new unit called the *iField Institute*. This new unit would integrate and provide curriculum and learning opportunities for students, alumni, Faculty partners, and other members of the larger iField community. It would leverage advanced e-learning to deliver programs with both local and global reach. Building, sustaining, and supporting a global iField learning and discovery community would be a core objective. The Institute should expand its learning communities to include chief executives and senior professionals with programs focused on innovation, leadership, emerging ideas, and the "big issues" of contemporary society.

**SUPPORTING RECOMMENDATIONS**

1.1) Collaboration Zones

1.1.1 **Recommendation:** The Inforum should be redesigned to maximize the number of "collaboration zones." These workgroup areas should be technologically rich, highly participatory, able to accommodate diverse groups (internal and external), and be supported by the appropriate expertise (technology, pedagogy, disciplinary, and group processes). Appropriate furniture, tools, and services relevant to the needs of the MI and MMSt programs will need to be deployed to facilitate this recommendation. These workspace may be separated by the use of collection stacks to facilitate work group focus. Illustrations of this are shown in Appendices 4 and 5.

1.1.2 **Recommendation:** Create specific (and dedicated) quiet study areas in selected locations throughout the Faculty. Equip these places with comfortable tables and chairs, and ensure they are well lit. Successful use of these room will depend on making them desirable locations for reflective and concentrated study. Rooms such at 706 and 718 as well as 601V and possibly 323 should be considered for this use.

1.1.3 **Recommendation:** Create a Collaborative Learning Centre by converting Room 417 (and its surrounding rooms: 415, 416 and 418) into a dynamic learning space. These rooms have suffered from poor noise abatement resulting in widespread complaints about the
usability of these spaces for their designated purposes (e-classroom, group study, meetings). While not a conventional classroom, the redesigned space will resemble Rooms 507 and 528 (highly configurable, technology enabled, flexible furniture, whiteboards and collaboration tools, comfortable and inviting) and be suitable for collaborative learning and consultation with breakout spaces consisting of small clusters of tables and chairs. This bookable facility will be used by the iField Institute for executive programs, by Faculty for innovative learning sessions, and by all Inforum users as quiet study space when it is not booked for learning events.

1.1.4 Recommendation: Consider that one of the collaboration zones in the Inforum be dedicated to a gaming space. Equip this area with specialized equipment and software (consoles, screens, audio, mobile devices, games). Consider a real time video link to the Semaphore lab to enable cross unit collaboration and interaction.

1.1.5 Recommendation: Renovate and upgrade Room 307 to be used as a combination Usability Lab, media production room, and video conferencing room. UTL has expressed a need for a usability lab and wishes to partner with the Faculty on this initiative. Campus ITS and other units may also be interested in joining such a partnership. Media production and use (e.g. audio, video, green screen, 3D image capture, motion capture, wearable IT, webinars, video conferencing, digitization) could all be facilitated in this space.

1.1.6 Recommendation: In partnership with UTL, create a "hackerspace" on the 1st floor (Room 111 or another suitable space) to enable groups to create and build using digital tools and specialized equipment (e.g. haptic technologies, 3D scanners, sensors). Hackerspaces are areas where digital creativity can be exercised using advanced tools and with student groups working collaboratively. This space will be intentionally designed to attract participation and engagement from the entire University of Toronto community.

1.2) Laboratories and Research

1.2.1 Recommendation: Consider the creation of "labs within the Lab" (the Inforum). These specialized facilities within the Inforum will be dedicated to specific functions and equipped to perform specialized tasks. These labs should engage faculty and students in collaborative work and be open and transparent to others (such that interest is generated in the work and the outcomes).

1.2.2 Recommendation: Since the exact nature and disposition of these labs has yet to be fully defined, implement a transition strategy. Initially, move the collections off the 5th floor and establish that space as a collaboration zone. Equip and design this space for maximum flexibility. When plans are finalized for specific labs, transform this space appropriately. Laboratory needs have been identified for Records Management, Digital Curation, e-Books, Visualization, Museum Curation, and Knowledge Management. Consider appropriate lab space both inside the Inforum as well as throughout the Faculty. See Appendix 4 for illustrations of this strategy.
1.2.3 Recommendation: Work with Semaphore to make their lab more accessible to all faculty and students in the iSchool. Develop programming or technologies, in conjunction with the Inforum, that link the two facilities.

1.2.4 Recommendation: The *iField Institute* should be central in supporting research technology such as that in labs and other research facilities. The expertise of the *iField Institute* could assist both students at both the Master’s and Doctoral levels. It would result in improved research outcomes and help develop a greater sense of research community and collaboration.

1.2.5 Recommendation: Faculty members should view the *iField Institute* as a research partner throughout the research process from initial grant application through to project conclusions. Individual faculty members should be expected to include *iField Institute* equipment, expertise, and services as direct expenses on research grant applications.

1.2.6 Recommendation: As appropriate, research labs should be seen as integral spaces within the *iField Institute* under the control of the relevant academic staff.

1.3) Collections

1.3.1 Recommendation: The Inforum print collection should be analyzed to determine usage and required availability. Older and less used materials should be identified and transferred to the UTL storage facility in Downsview where it is easily retrievable with advance notice. While the data will determine the actual extent of these materials, a target should be to reduce the onsite collection by two-thirds.

1.3.2 Recommendation: The remaining collections should be removed from the 5th floor and distributed in collection "pods" throughout the 4th floor (using lower stack shelving). This will create work zones demarcated by active collections. See Appendix 4 for illustrations of this design.

1.3.3 Recommendation: Currently the Inforum purchases some journals in print that are provided in digital formats by UTL; this should cease. UTL staff should be engaged to facilitate this change (e.g. catalogue changes, licensing, access requirements). Where possible, only digital versions (including back-files) should be acquired. All existing print duplications should be moved to storage. The Inforum should work with UTL ITS to maximize the use of Scholars Portal and other digital discovery tools and platforms to dramatically increase access to digital resources.

1.3.4 Recommendation: The Inforum contains two important special research collections (Subject Analysis and History of Library Science). These materials should be removed from the open shelves and located in a secure, but accessible, area.

1.4) Reference

1.4.1 Recommendation: The reference desk and service should serve as a physical hub for the Inforum (a sort of central nervous system within the central nervous system). While
reference services will continue to happen in diffuse ways throughout the iSchool, a central reference service is still necessary, particularly if its role is expanded to be a focal point for consultation and problem solving.

2.1) Curriculum & Co-curriculum

2.1.1 Recommendation: All librarians should be expected, as part of their normal responsibilities, to offer instruction in the regular Faculty curriculum. This would include embedded instruction, acting as course associates, and teaching specific courses.

2.1.2 Recommendation: Co-curricular initiatives and activities throughout the Faculty should be developed as part of an integrated plan that undergoes constant monitoring and improvement.

2.1.3 Recommendation: The iField Institute should host events, symposia, and conferences in the Inforum space, other iSchool space, and through digital services (e.g. webinars, web conferencing, podcasts, etc.) to extend and promote the expertise of the Faculty. Increasing and expanding these initiatives, featuring iSchool faculty and students, will expand the influence of the Faculty, attract partnerships from external groups, and facilitate the recruitment of new students.

2.1.4 Recommendation: MI and MMSt students as well as undergraduate students should be hired as assistants both in providing library services and in contributing to IT development projects. These part time positions should be designed so as to contribute to the applied learning of the students. Consideration should be given to expanding this program as a work-study option and as a recruitment incentive.

2.1.5 Recommendation: Establish mechanisms to engage MI and MMSt students with the IT projects of the iField Institute in order to provide hands on learning opportunities that would advance leading edge IT. Some of the projects might emerge from the work of PhD students (e.g. via "micro grants"). These projects must be specifically embedded in the academic work of the student or linked to the research agendas of the iSchool.

2.1.6 Recommendation: In conjunction with the Centre for Teaching Support and Innovation (CTSI), the iField Institute should provide the infrastructure and support required for the Faculty to engage, as it must, in online learning and alternative modes of delivery.

2.1.7 Recommendation: The iField Institute should be mandated to take on the responsibility for "applied learning and professional practice" within the Faculty. This would include managing internships, coop placements, and practicums as well as operating laboratories and hosting research initiatives (or symposia) that engage current students and connect external partners to the work of the Faculty.

2.1.8 Recommendation: Post-degree professional upgrading should migrate from skills upgrading to an increased focus on senior administrative and chief executive learning communities and leadership development initiatives. Ideally, modules developed as part of
this series of courses should be largely transferable as modular units within a possible new master’s program.

2.2) Classroom Technology

2.2.1 Recommendation: Work with Office of Space Management (OSM) to the greatest extent possible in 1) arriving at an agreement on classroom technology standards and upgrades for central space and 2) consider converting some individual rooms from centrally-scheduled to locally-scheduled to allow renovations, upgrading, and better support.

2.2.2 Recommendation: Phase out desktop support in computer labs and invest in laptops and BYOD (Bring Your Own Device) accommodations. Inform students that a portable computing device is expected for the programs. Use the Inforum equipment loan system to provide backups to those unable or unwilling to use their own equipment (esp. regarding classes and programs provided to external clients).

2.2.3 Recommendation: Upgrade Rooms 224/225 (e-classrooms) to support a configurable range of IT environments suited to specific needs: desktop equipment (for compute intensive courses), BYOD support (for general purpose needs) and deployable laptops (for training sessions or temporary access). Link course scheduling and enrolment for compute intensive courses to the allocation of desktops in these rooms (i.e. ensure adequate resources through provisioning and enrolment limits).

3.1) Digital iSchool & IT Innovation

3.1.1 Recommendation: The need for effective IT support and availability will continue to increase and become more complex. Demands have already outstripped the capacity of the current Information Services; the current model is not sustainable. IT must increasingly become brokers of services and resources rather than providers themselves. This requires sourcing and integrating a suite of interoperating tools from a series of external providers and minimal reliance on local servers and locally hosted solutions.

3.1.2 Recommendation: Create APIs for the iSchool. This is both a metaphor and a concrete recommendation. Metaphorically it means opening up the school to internal and external engagement; the iSchool as a resource (or service or capacity) to be used to expand and enhance the work of others; the iSchool as an open community and a facilitator of the success of others. More concretely, an API (or set of APIs) should be created to allow others to tap into the resources, data, and services provided by the iSchool. This would include online documents or data, images, and faculty or student information (with appropriate informed consent). By making this data discoverable and reusable, the iSchool will provide building blocks for new services and innovative constructions. It will further the notion of the iSchool as a digital enabler and innovator.

3.1.3 Recommendation: The Faculty should create a Digital Presence Coordinating Committee, chaired by the Manager, Strategic Planning, to align its website strategy and a ubiquitous digital presence with iSchool directions. This Committee will coordinate the involvement of the various groups critical to an effective and engaging website. Membership
should be comprised of representatives from the *iField Institute, Recruitment, Communications, Career Services, Academic Programs, Student groups (MI, MMSt, ICCIT, and PhD), iSchool administration, and Development*. This group would coordinate and sustain the website and other public facing digital communications initiatives (e.g. Facebook, Twitter, etc.). While the central mandate of this group would be coordination, it would also facilitate experimentation and innovation.

**3.1.4 Recommendation**: Engage MI, MMSt, PhD, and ICCIT students and partners to collaboratively build and extend the iSchool digital presence with new ideas and implementations. Just as the Inforum is viewed as an experimental zone, consider the iSchool digital environment and culture in a similar way.

**3.1.5 Recommendation**: Adopt a strategic focus on cloud solutions and on-demand options, allowing IT to provide sophisticated tools and services with limited staff resources. Enabling digital work environments (compute, storage, software) should be done on-demand through dynamic provisioning services offered through initiatives like OpenStack, emerging research environments such as macGRID, commercial services provided by Amazon Web Services, Telus, or Cogego Data Services, or a partnership with central ITS. These cloud based options move beyond SaaS (Software as a Service) to IaaS (Infrastructure as a Service).

**3.1.6 Recommendation**: The *iField Institute* should establish a virtual toolbox consisting of current and emerging technologies which the Faculty community wishes to use as part of experimentations or explorations. This e-workbench would provide easy access to tools and resources necessary for the rapid deployment of test environments (e.g. a suite of CMS tools, KM software, DB environments, open source repositories, integrated library systems and other information management systems, conservation tools, cataloguing systems, design tools, analysis software, etc.).

4.1) **External Partnerships**

**4.1.1 Recommendation**: The *iField Institute* should aggressively engage and attract participation from external partners in iSchool initiatives. The *iField Institute* should be viewed as both a magnet and a resource to integrate the iSchool with partner individuals, groups, and organizations. The facility and its services should be more available to external groups and as a result, the iSchool will become more influential in the work of others. To accomplish this the Faculty will have to promulgate a definitive brand and adopt a branding strategy.

**4.1.2 Recommendation**: The staff of the *iField Institute* and campus ITS should partner on project specific prototyping or testing of new technologies or services being considered for campus deployment. These partnerships will put the *iField Institute* in a leadership role regarding technology adoption and should benefit the iSchool both financially and in terms of resource provision. In particular, the *iField Institute* should become instrumental in the evolution of the ITS Academic Technology Suite.

**4.1.2 Recommendation**: The staff of the *iField Institute*, and the librarians in particular, have specialized skills and expertise that could be effectively, and lucratively, marketed as consultation services to the external library and wider iField communities. Using the resources
of the Inforum and the iSchool, the librarians could coordinate a consultation service comprised of MI and MMSt students. This entrepreneurial initiative would link the expertise and resources of the Inforum with the career ambitions of the students.

5.1) Standardize and Streamline Core Services

5.1.1 Recommendation: The *iField Institute* should explore opportunities and partner with UTL to streamline library operations. Where beneficial, the Inforum should adopt as many existing library processes in conjunction with UTL; this would include acquisitions, cataloguing, e-licensing, and digital infrastructure for collections and access.

5.1.2 Recommendation: The Faculty should centrally support only designated IT services. For example, the Faculty should adopt as core technologies the central ITS implementation of Microsoft Office 365 and its suite of tools: email, calendaring, word processing, spreadsheets, SharePoint, and others. It should adopt and use as widely as possible the ITS supported Academic Technology Suite. Those who choose other tools and services will be required to fund and support their alternative IT without Faculty or *iField Institute* support.

6.1) Merging Information Services and the iSchool Institute

6.1.1 Recommendation: As soon as possible hold a planning and visioning session with staff from both units to establish core objectives and values, identify key opportunities and challenges, and build an integrated organization.

6.1.2 Recommendation: Create a new brand for the *iField Institute* to reflect its new integrated and multidimensional focus.

6.1.3 Recommendation: Following from the success of the Public Library Leadership Fellows Program, conduct a market analysis of executive leadership programs within the iField community to determine feasibility and to identify initial pilot programs and constituencies.

6.1.4 Recommendation: Reorganize and realign staff in order to best support the work and the priorities of the new unit.

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.

7.2) Space Planning

7.2.1 Recommendation: Create an iSchool Master Space Plan, led by the Dean and an advisory committee (which will include a space design professional), that articulates the current and long term strategy for the use of space in all the Faculty areas. This plan should identify key principles, decision making processes, funding strategies, and both short and long term priorities. The iField Institute space needs and opportunities should fit within the Master Space Plan. In the absence of such a plan, the iField Institute should construct or utilize space in such a way to enable reassignment or alternative uses.
7.2.2 Recommendation: In implementing a renewed vision of Information Services as the *iField Institute*, it is essential to view the entire Faculty facility as a platform for *iField Institute* resources and services (i.e. the Inforum is not just the 4th and 5th floors but distributed throughout Bissell and other iSchool facilities). By doing this, the *iField Institute* can fully integrate its services and resources into the mainstream of the Faculty. All new or re-imagined space should be as flexible as possible to enable multiple uses and future reconfiguration.

7.3) Staff Workspace

7.3.1 Recommendation: Dismantle the Reference and Circulation Desk (and surrounding resources) and reconfigure this area to increase staff workspace (the IT group is especially cramped). Redesign Rooms 408 and 413 (the existing staff work rooms) and the area currently occupied by the Reference and Circulation Desk as an open and accessible collaborative space which provides a workplace for the staff but also encourages interaction with users. See Appendix 4 for an illustration of this strategy.

7.3.2 Recommendation: Remove the partial wall that separates Rooms 408 and 414. This will facilitate a stronger interaction among all staff and encourage a more holistic view of Information Services priorities and opportunities. See Appendix 4 for an illustration of this strategy.

7.3.3 Recommendation: Maintain Room 409 as an office for the Executive Director of the *iField Institute* and maintain Room 410 as an office for the Careers Officer. More accessible access to Room 408/413 will encourage more interaction with these individuals.
Section 4: Conclusion

Unlike almost every other discipline, information is not a service to the Faculty, information is the very work of the Faculty. The iField Institute should not be just a support service; it is, and should be, at the core of everything the Faculty does.

The Inforum and Information Services have taken some steps towards the transition outlined in this report. Many of their initiatives have established new directions which the Task Force applauds. However, the consultations with the community and the deliberations of the Task Force suggest future developments which will require starting new initiatives and the letting go of some existing ones. This is a critical transition period. It is insufficient to simply mandate this change. A reinvigorated Information Services and iSchool Institute will require a different kind of learning; it cannot simply be different from what it is now or has been in the past. It will require committed and nurturing leadership to guide it through that learning process and to connect it as deeply as possible to the core mission of the Faculty.

By transforming Information Services and the iSchool Institute into the iField Institute, the Faculty of Information has the opportunity to create a dynamic, cutting edge incubator and collaboratory unlike anything in North America. Leveraging and maximizing this advantage is crucial to enabling the strategic directions of the Faculty and the aspirations of its faculty, students, staff, and alumni. The integrated and refocused iField Institute is an holistic response to the numerous challenges experienced in both Information Services and the existing iSchool Institute.

Advancing these recommendations will require focused and determined leadership from the Executive Director and the ongoing commitment and engagement of the Faculty. Just as the idea of the Inforum re-imagined library service in the Faculty, so too will these recommendations dramatically redefine the role, impact, and contributions of Information Services and set it on a new and transformational course as the iField Institute.
Appendices

Appendix 1. Terms of Reference

Task Force on Strategic Directions for Information Services
Terms of Reference

At its meeting on October 12, 2012, the Information Services Committee agreed on the establishment of a Task Force on Strategic Directions for Information Services to propose a plan for the future shape and services of the INFORUM and Information Services and more generally, to identify and rank priorities.

Mandate

The Task Force on Strategic Directions for Information Services, as an ad hoc committee of the Information Services Committee, is to oversee and coordinate an action plan for the future shape and services of the Inforum and Information Services, ensuring appropriate participation among all the relevant bodies of governance, administrative offices and the respective faculty constituencies – faculty, staff, and students. The report of the Task Force will be presented to ISC for consideration. The report and the recommendations which the ISC feels should be taken forward will be presented to Faculty Council for its consideration and endorsement.

It shall be the responsibility of the Task Force on Strategic Directions for Information Services to:

1. Examine emerging trends at library and media spaces in leading academic and public research institutions and consider how they:
   a. Handle research and teaching collections and their accommodation
   b. Facilitate information technology and services
   c. Have been designed, laid out and use physical facilities
   d. Support and enable teaching and learning
   e. Support and enable research

2. Research how the other 38 or so iCaucus schools address the provision of adequate library and media spaces and Information Services, IT, design of their facilities and to reflect upon the structure, design, and delivery;

3. Based on the trends and best practices revealed in 1) and 2), review and make recommendations concerning the role of the Inforum in teaching, learning, and research support;
4. Propose a plan on how to move forward in the future in conjunction with the Faculty’s strategic plan, which considers such issues as services, staffing, infrastructure requirements, space use (e.g. layout); and,

5. Report by mid-May 2013 to the Information Services Committee, and then to Faculty Council on its deliberations and recommendations.

Membership

Chaired by Mike Ridley (University of Guelph), the Task Force on Strategic Directions for Information Services comprises:

Professor Lynne Howarth (Associate Dean, Research)
Professor Patrick Keilty
Professor Brian Cantwell-Smith
Professor Kelly Lyons
Ivan Sestak (former Senior IT Administrator, now ITS Manager)
Elisa Sze (Librarian, Collections & Public Services Coordinator)
Sanjin Kuduzovic (MI Student)
Andy Keenan (PhD Student)
Caitlin Tracey-Miller (MMSt Student)
Kimberly Silk (Past President, FIAA)

Andrew Drummond (Manager, Strategic Planning) will serve as Co-ordinator to the Committee and Areti Vourinaris will provide some liaison support.
Appendix 2. Consultation Process and Community Engagement

The Task Force held 6 in-person meetings (January 25, February 7, March 8, March 21, April 4, and April 18), a half day retreat (May 2) and a wrap-up meeting (May 17).

The Task Force consulted very broadly with multiple iSchool, U of T, and external individuals and groups in a variety of ways, as detailed below:

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<th>Type of Consultation</th>
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<tr>
<td>Initiation of Task Force</td>
<td>December 19</td>
<td>Seamus Ross</td>
</tr>
<tr>
<td>PhD consultation, led by task force member Andy Keenan</td>
<td>n/a; via email and online tools</td>
<td>PhD Students</td>
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<td>MMSt consultation led by task force member Caitlin Tracey-Miller</td>
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<td>MI consultations, initiated by task force member Sanjin Kuduzovic</td>
<td>n/a</td>
<td>MI Students</td>
</tr>
<tr>
<td>Interviews with librarians</td>
<td>January 31</td>
<td>Kathleen Scheaffer, Nalini Singh, Elisa Sze</td>
</tr>
<tr>
<td>Email submissions</td>
<td>Various</td>
<td>Messages received from students and alumni</td>
</tr>
<tr>
<td>Meeting and tour of Bissell</td>
<td>February 7</td>
<td>Susan Brown and Glen Menzies</td>
</tr>
<tr>
<td>Listening Sessions (7)</td>
<td>February 7, February 22, March 8, March 14 (2 sessions)</td>
<td>General; open discussion</td>
</tr>
<tr>
<td>Informal Discussions</td>
<td>February 13-15</td>
<td>iConference, Fort Worth, TX</td>
</tr>
<tr>
<td>Interview</td>
<td>February 22</td>
<td>Seamus Ross</td>
</tr>
<tr>
<td>Interviews with Deans</td>
<td>Post iConference</td>
<td>Gary Marchionini (Dean, iSchool, UNC); Jennifer Preece (Dean, iSchool, Maryland)</td>
</tr>
<tr>
<td>Interviews with individual faculty members</td>
<td>Various</td>
<td>Costis Dallas, Wendy Duff, Sara Grimes, Mark Chignell</td>
</tr>
<tr>
<td>Visioning Session</td>
<td>March 7</td>
<td>Information Services Staff</td>
</tr>
<tr>
<td>Interview</td>
<td>March 13</td>
<td>Seamus Ross</td>
</tr>
<tr>
<td>Interview</td>
<td>March 28</td>
<td>Bob Cook, U of T CIO</td>
</tr>
<tr>
<td>Interview</td>
<td>March 28</td>
<td>Larry Alford, Chief Librarian</td>
</tr>
<tr>
<td>Open discussions with faculty</td>
<td>April 3, April 4 (2 sessions), April 5 (2 sessions), April 8</td>
<td>Faculty members</td>
</tr>
<tr>
<td>Discussion</td>
<td>April 11</td>
<td>Master’s Tech Fund Committee</td>
</tr>
<tr>
<td>Update Report from Task Force</td>
<td>April 12</td>
<td>Faculty of Information (faculty, students, staff)</td>
</tr>
<tr>
<td>Event Type</td>
<td>Date</td>
<td>Participants</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Group Session</td>
<td>April 18</td>
<td>UTL Staff: Julie Hannaford, Sian Miekle, Andrew MacAlorum</td>
</tr>
<tr>
<td>Group Session</td>
<td>April 29</td>
<td>ITS Staff: Bob Cook, Avi Hyndman, Laurie Harrison, Martin Loeffler</td>
</tr>
<tr>
<td>Presentation</td>
<td>May 15</td>
<td>Dean’s Advisory Council</td>
</tr>
</tbody>
</table>
Appendix 3. Recommendations (Timeframes and Priorities)

Immediate = within the next 6 months
Short Term = 6 – 12 months
Medium Term = 1 – 2 years

Items starred (*) indicated especially high priority items. Capital intensive recommendations are highlighted in red.

Following approval, each recommendation should be annotated with Key Responsibility, Oversight/Accountability, and Current Status.

<table>
<thead>
<tr>
<th>Recommendation</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. The Inforum and Information Services should be refocused as a platform for exploration and experimentation with different models, new ideas, innovative technology, and emerging trends.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>1.1 Collaboration Zones</strong></td>
<td></td>
</tr>
<tr>
<td>1.1.1 The Inforum should be redesigned to maximize the number of &quot;collaboration zones.&quot;</td>
<td>*Immediate</td>
</tr>
<tr>
<td>1.1.2 Create specific (and dedicated) quiet study areas in selected locations throughout the Faculty.</td>
<td>*Ongoing</td>
</tr>
<tr>
<td>1.1.3 Create a Collaborative Learning Centre by converting Room 417 (and its surrounding rooms: 415, 416 and 418) into a dynamic learning space.</td>
<td>Short Term</td>
</tr>
<tr>
<td>1.1.4 Dedicate one collaboration zone to gaming space.</td>
<td>Short Term</td>
</tr>
<tr>
<td>1.1.5 Renovate and expand use of Usability Lab 307.</td>
<td>*Immediate</td>
</tr>
<tr>
<td>1.1.6 Create “Hackerspace” on 1st Floor (in collaboration with UTL).</td>
<td>*Short Term</td>
</tr>
<tr>
<td><strong>1.2 Laboratories and Research</strong></td>
<td></td>
</tr>
<tr>
<td>1.2.1 Create specialized ‘labs within the lab’ in the Inforum space.</td>
<td>*Ongoing</td>
</tr>
<tr>
<td>1.2.2 Implement transition strategy by a) moving general collection to 4th floor; b) transform 5th floor space to collaboration zone designed with flexibility in mind; c) transform space over time based on clearly identified needs.</td>
<td>*Immediate and Short Term</td>
</tr>
<tr>
<td>1.2.3 Link Semaphore more closely to Faculty</td>
<td>Short Term</td>
</tr>
<tr>
<td>1.2.4 Support research technology in labs and other research facilities and projects through the <em>iField Institute</em>.</td>
<td>*Ongoing</td>
</tr>
<tr>
<td>1.2.5 Develop the <em>iField Institute</em> as research partner throughout process from grant application through project completion; include IS support as overhead in research grant applications.</td>
<td>*Ongoing</td>
</tr>
</tbody>
</table>
1.2.6 View research labs as integral spaces of the *iField Institute* under control of the responsible academics.  

| Ongoing |

1.3.1 Perform usage and availability analysis of existing collection; move older and infrequently used materials to Downsview.  

| Immediate |

1.3.2 Distribute remaining collection on 4th floor, in low-stack shelving for improved accessibility, and arranged to demarcate "pods".  

| *Short Term |

1.3.3 Cease purchasing print materials obtained digitally by UTL.  

| *Immediate |

1.3.4 Move two specialized collections (Subject Analysis, History of LIS) from open shelving to a secure (but accessible) area.  

| Short Term |

1.3.5 Reference  

1.3.1 Use reference desk as a physical hub for the Inforum.  

| Ongoing |

2. Coordinate co-curricular learning activities in the Faculty through common branding, scheduling, and curriculum mapping.  

**2.1 Curriculum and Co-curriculum**  

2.1.1 Librarians should be expected to offer instruction within the curriculum as part of their regular duties within the Faculty.  

| *Medium Term |

2.1.2 Develop co-curricular initiatives and activities throughout the Faculty as part of an integrated plan that undergoes constant monitoring and improvement.  

| *Medium Term to Ongoing |

2.1.3 Host events, symposia, and conferences in the Inforum space, other iSchool space, and through digital services to extend and promote the expertise of the Faculty.  

| *Ongoing |

2.1.4 Hire iSchool students and undergraduates as assistants both in providing library services and in contributing to IT development projects.  

| Ongoing |

2.1.5 Establish mechanisms to engage Masters students with the IT projects of the *iField Institute* in order to provide hands-on learning opportunities that would advantage leading edge IT. Some of the projects might emerge from the work of PhD students (e.g. via "micro grants").  

| Medium Term to Ongoing |

2.1.6 In conjunction with the Centre for Teaching Support and Innovation (CTSI), the *iField Institute* should provide the infrastructure and support required for the Faculty to engage in online learning and alternative modes of delivery.  

| *Ongoing |

2.1.7 The *iField Institute* be mandated to take on the  

| *Medium Term |
Responsibility for "applied learning and professional practice" within the Faculty.

<table>
<thead>
<tr>
<th>2.1.8 Post-degree professional upgrading should migrate from skills upgrading to an increased focus on senior administrative and chief executive learning communities and leadership development initiatives.</th>
<th>Medium Term</th>
</tr>
</thead>
</table>

**2.2 Classroom Technology**

| 2.2.1 Work with Office of Space Management (OSM) to the greatest extent possible in 1) arriving at an agreement on classroom technology standards and upgrades for central space and 2) converting some individual rooms from centrally-scheduled to locally-scheduled to allow renovations, upgrading, and better support. | Immediate |

| 2.2.2 Phase out desktop support in computer labs and invest in laptops and BYOD (Bring Your Own Device) accommodations. | Short Term |

| 2.2.3 Upgrade Rooms 224/225 (e-classrooms) to support a configurable range of IT environments suited to specific needs. | Short Term |

**3. Adopt Innovative IT and Enhance Digital Presence**

| 3.1.1 IT must become brokers of services and resources rather than providers themselves. This requires sourcing and integrating a suite of interoperating tools from a series of external providers and minimal reliance on local servers and locally hosted solutions. | Immediate |

| 3.1.2 Create APIs for the iSchool to allow others to tap into the resources, data, and services provided by the iSchool. This would include online documents or data, images, and faculty or student information. | Short Term |

| 3.1.3 Create a digital presence coordinating committee to align the Faculty’s website strategy and ubiquitous online presence with Faculty priorities. | Immediate |

| 3.1.4 Engage iSchool students and partners to collaboratively build and extend the iSchool digital presence with new ideas and implementations. | Short Term |

| 3.1.5 Adopt a strategic focus on cloud solutions and on-demand options, allowing IT to provide sophisticated tools and services with limited staff resources. | Immediate |

| 3.1.6 Establish a virtual toolbox consisting of current and emerging technologies which the Faculty community wishes to use as part of experimentations or explorations. | Short Term |
### 4. Expand the Faculty’s ability to reach out and engage with external communities.

<table>
<thead>
<tr>
<th>4.1.1</th>
<th>Aggressively engage and attract participation from external partners in iSchool initiatives.</th>
<th>*Immediate</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1.2</td>
<td>The <em>iField Institute</em> and campus ITS should partner on project specific prototyping or testing of new technologies or services being considered for campus deployment.</td>
<td>Short Term</td>
</tr>
<tr>
<td>4.1.3</td>
<td>Market the specialized skills and expertise of the librarians to the external library and wider iField communities.</td>
<td>Medium Term</td>
</tr>
</tbody>
</table>

### 5. Standardize and Streamline Core Services

| 5.1.1 | Partner with UTL to streamline library operations. As appropriate and beneficial, the Inforum should adopt as many existing library processes as possible in conjunction with UTL. | *Immediate |
| 5.1.2 | The Faculty should support only centrally designated IT services. | *Immediate |

### 6. Merge Information Services with the iSchool Institute.

| 6.1.1 | Hold a planning and visioning sessions with staff from both units to establish core objectives and values, identify key opportunities and challenges, and build an integrated organization. | Immediate |
| 6.1.2 | Create a new brand for the *iField Institute* to reflect its new integrated and multidimensional focus. | Short Term |
| 6.1.3 | Conduct a market analysis of executive leadership programs within the iField community to determine feasibility and to identify initial pilot programs and constituencies. | *Short Term |
| 6.1.4 | Reorganize and realign staff in order to best support the work and the priorities of the new unit. | Short Term to Medium Term |

### 7.1 Governance, Leadership, and Administration

| 7.1.1 | The primary governance accountability for the *iField Institute* should be through a renamed Information Services Committee of Faculty Council. | Immediate |
| 7.1.2 | 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. | Immediate |
7.1.3 The *iField Institute* requires a full-time leader to determine strategies and priorities in fulfilling its mandate. This leadership role should be considered a senior manager within the Faculty reporting to the Dean.

| 7.1.3 | The *iField Institute* requires a full-time leader to determine strategies and priorities in fulfilling its mandate. This leadership role should be considered a senior manager within the Faculty reporting to the Dean. | *Immediate* |

7.1.4 The head of this new unit should be designed as an Executive Director. This position should be filled with an individual with demonstrated expertise in libraries, information technology, and academic innovation. The Executive Director will be expected to teach in the MI or MMSt program.

| 7.1.4 | The head of this new unit should be designed as an Executive Director. This position should be filled with an individual with demonstrated expertise in libraries, information technology, and academic innovation. The Executive Director will be expected to teach in the MI or MMSt program. | Immediate |

7.1.5 The IT vacancy (Senior IT Administrator) should be used to hire a IT Project Manager.

| 7.1.5 | The IT vacancy (Senior IT Administrator) should be used to hire a IT Project Manager. | Short Term |

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

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

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

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

7.1.8 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.

| 7.1.8 | 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. | Ongoing |

### 7.2 Space Planning

7.2.1 Create an iSchool Master Space Plan, lead by the Dean and an advisory committee (which will include a space design professional), that articulates the current and long term strategy for the use of space in all the Faculty areas.

| 7.2.1 | Create an iSchool Master Space Plan, lead by the Dean and an advisory committee (which will include a space design professional), that articulates the current and long term strategy for the use of space in all the Faculty areas. | Medium Term |

7.2.2 View the entire Faculty facility as a platform for the *iField Institute* resources and services (i.e. the Inforum is not just the 4th and 5th floors but distributed throughout Bissell and other iSchool facilities).

| 7.2.2 | View the entire Faculty facility as a platform for the *iField Institute* resources and services (i.e. the Inforum is not just the 4th and 5th floors but distributed throughout Bissell and other iSchool facilities). | *Ongoing* |

### 7.3 Staff Workspace

7.3.1 Dismantle the Reference and Circulation Desk (and surrounding resources) and reconfigure this area to increase staff workspace.

| 7.3.1 | Dismantle the Reference and Circulation Desk (and surrounding resources) and reconfigure this area to increase staff workspace. | Immediate |

7.3.2 Remove the partial wall that separates Rooms 408 and 414.

| 7.3.2 | Remove the partial wall that separates Rooms 408 and 414. | Immediate |

7.3.3 Maintain Room 409 as an office for the Executive Director of the *iField Institute* and maintain Room 410 as an office for the Careers Officer.

| 7.3.3 | Maintain Room 409 as an office for the Executive Director of the *iField Institute* and maintain Room 410 as an office for the Careers Officer. | Ongoing |
Appendix 4. Space Planning Scenarios

a) Inforum 4th Floor: Collaboration Zones, Collaboration Learning Centre, Collections
b) Inforum 4th Floor: Staff Workspace and Consultation Areas
c) Inforum 5th Floor: Collaboration Zones
d) Information 5th Floor: Laboratories
Appendix 5. Collaboration Zones

Characteristics:

- workspace for groups of 3 to 5
- adjustable table and work surfaces
- adjustable and movable chairs
- large screen monitor for group display
- BOYD support; shared computer (optional)
- access to digital productivity tools, on demand computing, cloud storage, cameras, audio tools, input devices
- white boards or glass surfaces for notes and diagrams
- demarcated from other areas by mid height glass walls or collection shelving
- characterized as warm, colourful, diverse, interactive, engaging, and productive

The following examples from UCLA and NCSU illustrate options but are not presented here as specific recommendations:
Hackerspace (1st Floor):
Appendix 6. Strategic Examples from Other Institutions

**Harvard Library Lab:** "The Harvard Library has established the Harvard Library Lab in order to create better services for students and faculty and to join with others in fashioning the information society of the future. By offering infrastructure and financial support for new enterprises, the Lab offers opportunities for individuals to innovate, cooperate across projects, and make original contributions to the way libraries work. The Lab leverages the entrepreneurial aspirations of people throughout the library system and beyond and promotes projects in all areas of library activity."

http://byron.hul.harvard.edu/liblab

The Harvard Library Innovation Lab (Harvard Law School) and MetaLAB (Harvard School of Design) are collaborating projects with the Library Lab and demonstrate how projects can interact and be interdisciplinary.

**Hunt Library, North Carolina State University:** "The Hunt Library was designed to meet the challenge of re-envisioning library spaces as a platform for research. The library’s goal is to engage researchers across disciplines by deploying broadly applicable technologies such as large-scale visualization, high resolution and 3D imagery, and interactive computing. These core technologies are expressed in physical spaces such as Immersion Theater, Game Lab, Media Production Studios, Teaching & Visualization Lab, and Creativity Studio. Through an inherent ability to reconfigure, re-purpose, and interchange components and infrastructure, the building’s technology itself is designed to be an object of research, a sandbox for emerging technologies and a showcase for cutting edge applications. A core service offering will be ‘project cloud’ space, which will enable students and researchers to easily ‘check out’ computing power and transfer large projects in and out of the library’s environment. Technology staff have been retrained and redeployed to support the new capabilities, and an academic technologist added to consult with researchers and match their needs with the building’s capabilities."

http://www.lib.ncsu.edu/huntlibrary

**New York Public Library Labs:** "The NYPL Labs is an experimental design and technology unit creating interactive experiences around research library collections and data. Based at NYPL’s flagship branch on 42nd Street, Labs operates as an in-house startup, working closely with curators to develop projects that push the envelope of library practice, engage new audiences through user collaboration and crowdsourcing, and accelerate the flow of cultural heritage content, data and code into the digital commons."

http://www.nypl.org/collections/labs

**MediaLab at MIT:** "Actively promoting a unique, antidisciplinary culture, the MIT Media Lab goes beyond known boundaries and disciplines, encouraging the most unconventional mixing and matching of seemingly disparate research areas. It creates disruptive technologies that happen at the edges, pioneering such areas as wearable computing, tangible interfaces, and
affective computing. Today, faculty members, research staff, and students at the Lab work in 26 research groups on more than 350 projects that range from digital approaches for treating neurological disorders, to a stackable, electric car for sustainable cities, to advanced imaging technologies that can “see around a corner.” The Lab is committed to looking beyond the obvious to ask the questions not yet asked—questions whose answers could radically improve the way people live, learn, express themselves, work, and play.

http://www.media.mit.edu/

Digital Media Zone at Ryerson: "The Digital Media Zone (DMZ) at Ryerson University is one of Canada’s largest incubators and multi-disciplinary co-working spaces for young entrepreneurs. This hub of digital media innovation, collaboration and commercialization is home to both startups and industry solution-providers. The DMZ leads the way in experiential learning and business success by creating a unique ecosystem of education and entrepreneurship. Emerging leaders fast-track their product launches and grow their companies in this supportive community by connecting with mentors, customers and each other."

http://digitalmediazone.ryerson.ca/