IPER Update March 2010

Including a summary of the
Ask IPER Web Conference
March 10, 2010 | 3:00 pm EDT

Council of State Archivists

March 30, 2010

We have compiled this report to serve two purposes:

- To provide a summary of the Ask IPER Web Conference held on Wednesday, March 10, 2010, that clarifies details about the project schedule for those who tuned into the conference; and
- To provide an update for everyone involved with the IPER Project about its progress and plans whether or not they attended the Ask IPER session.

Ask IPER Web Conference

The one-hour Ask IPER Web Conference was held on Wednesday, March 10, 2010, and was delivered via iLinc, the online conferencing system through which IPER courses will be delivered. Seventy people from 38 states and territories participated in the conference.

This report summarizes the information provided during the Ask IPER session and includes some additional details that have been finalized since the Web conference occurred.

IPER Progress Report

- Introduction to Records and Information Management
- Essential Records (ER) course
- Records Emergency Planning and Response (REPR)
- Train-the-Trainer Institutes (TTTs)
- Resource Center

The Ask IPER Web Conference was designed to

- Provide a Progress Report on the courses and Resource Center being developed by the IPER project.
- Discuss the nature and timing of activities that will prepare the Instructional Teams in each state and territory to deliver the IPER courses.
- Encourage state teams to explore online learning resources in advance of the IPER training and gather some state-specific information needed for the courses.

New IPER and CoSA Staff

We have been busy since our last **Ask IPER Web Conference** in September 2009. The IPER staff and subject matter experts have been focused on completing development of the curriculum for the two main courses, Essential Records (ER) and Records Emergency Planning and Response (REPR) over the last few months. It has been an intense and exacting process, and we did not have enough staff to do this work and sustain communication. The good news now is that the curriculum is almost complete AND we have added staff to help carry the project forward. Our two newest staff members in particular are largely devoted to keeping the channels of communication open. We've provided profiles of each of the CoSA/IPER staff members at the end of this Update. You can also find contact information for all IPER staff at http://www.statearchivists.org/iper/IPER_staff.htm.

Introduction to Records and Information Management (RIM)

Introduction to Records and Information Management (RIM)

- Available online: www.statearchivists.org/IPER/rim/
- Promotional materials emphasize that good records management provides the best foundation for essential records preparedness
- CoSA welcomes additional states to put RIM on their servers
- Will provide files and instructions for creating CDs that states may distribute

The ***Introduction to Records and Information Management*** course is now available online free of charge. It is a self-directed 90-minute narrated PowerPoint designed as a prerequisite to the two main IPER courses. We hope you will encourage local government officials and other potential students who have little or no records management experience to take this course now in anticipation of the IPER courses coming later this year.

You can find information about the course and a link to view it at: http://www.statearchivists.org/iper/rim/index.htm

- CoSA has a **flyer available** that you can use to distribute information about the Intro to RIM course.
- We have not yet done any systematic **promotion of the course**, but plan to start soon.
- We will be **sending CDs to every state archives and records management program** in April or May with all of the files necessary to run the course from a desktop computer. Everyone is welcome to copy and distribute these CDs.
- We can also provide the PowerPoint presentation itself (along with the accompanying script) if anyone would like to use it for their own in-person presentations.
- We would welcome additional state archives and records management programs to provide server space for the course files. The course is contained in a large Flash file that consumes a fair amount of bandwidth, more than CoSA's own server will be able to handle as demand grows, so we are linking to files posted on a number of state computer systems across the county. If you can provide server space, contact Vicki Walch (vwalch@statearchivists.org).

Two main IPER courses:
Essential Records (ER) and Records Emergency Planning and Response (REPR)

Two main IPER courses:
Essential Records (ER)
Records Emergency Planning and Response

- Webinar curriculum now in final draft
- Reviews by FEMA subject-matter experts complete
- Pilots begin late-April
- Will submit for final FEMA certification after pilots

The IPER staff, subject matter experts (SMEs), and curriculum contractors have been working intensively over the last several months to complete the instructional materials for the two main IPER courses, ***Essential Records*** (ER) and ***Records Emergency Planning and Response*** (REPR).

In January, our two lead SMEs—Candice Odom of the California State Archives and Dan Cantrall of the Oregon State Archives—led a walk-through of the ***Essential Records*** course. This process taught us a lot, not only about how the content could be refined but about the process of delivering the courses online.

There are three stages involved in "testing" and certifying the courses.

1. **Walk Through** in which the presenters deliver the entire course to an "internal" audience of IPER staff and other SMEs. The ER Walk Through was conducted in January 2010; the REPR Walk Through will be delivered in early April.

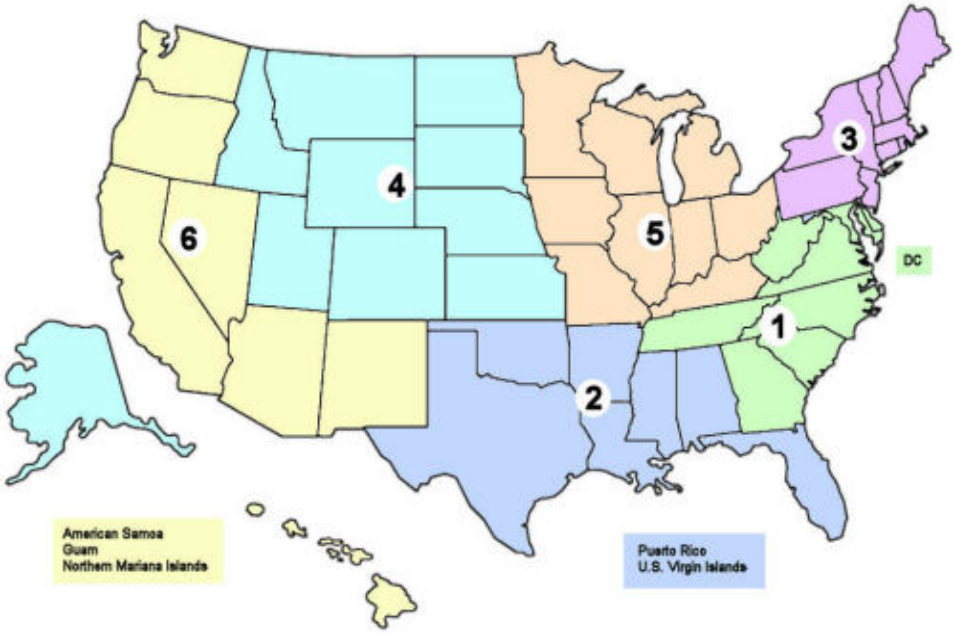
2. **Pilots** for each course are, in effect, the final dress rehearsal. They will be delivered to a group that includes IPER staff and SMEs along with some actual student participants. **State Instructional Teams in Regions 1, 2, and 3 will also observe these pilots as part of their Train-the-Trainer program**. (see next section for information about what region your state is in).

3. **FEMA Certification** will come last. We will make final corrections in the two courses based on results of the pilots and submit for final review by FEMA in July. We are hoping this process will be quick, but it may take several weeks. As soon as the courses are formally certified, but not before, Instructional Teams may begin to deliver actual training.

IPER Train-the-Trainer Program

Updated April 7, 2010

We have assigned all of the states and territories to one of six IPER Regions. Dates for each component of the Train-the-Trainer program are given in the table below. Note that all components will be held online, except for one in-person Train-the-Trainer Institute in each region. Travel expenses will be covered for up to three individuals from each state and territory to attend the Regional Institutes.



View this map online at http://www.statearchivists.org/iper/faqs.htm

	Region 1 DC, DE, GA, MD, NC, SC, TN, VA, WV	Region 2 AL, AR, FL, LA, MS, OK, PR, TX, VI	Region 3 CT, MA, ME, NH, NJ, NY, PA, RI, VT	Region 4 AK, CO, ID, KS, MT, ND, NE, SD, UT, WY	Region 5 IA, IL, IN, KY, MI, MO, MN, OH, WI	Region 6 AS, AZ, CA, GU, HI, MP, NM, NV, OR, WA
Kick Off 90-minute online webinar	April 20 or April 21, 2010 (choose one)			June 2 or June 4, 2010 (choose one)		
Observations of ER & REPR course deliveries online via iLinc Four sessions per course (90-110 min each)	ER – April 27*, 29, May 4, 6* REPR – May 11*, 13, 18, 20*			ER – June 22*, 24, 29, July 1* REPR – July 6*, 20, Aug 3, 17*		
Debriefings after Sessions 1 & 4 of observations online via iLinc (4 total, 30 mins. each)	* Debriefings (30 minutes) for each course will occur immediately after the observations of Sessions 1 & 4 on the dates shown above.			* Debriefings (30 minutes) for each course will occur immediately after the observations of Sessions 1 & 4 on the dates shown above.		
Train-the-Trainer (TTTs) Institutes In-person, 2 full days plus opening evening session. IPER funds cover travel for up to 3 from each state & territory.	July 13-15 Atlanta GA	July 26-28 Atlanta GA	Aug 30-Sept 1 Hartford CT	Sept 15-17 Denver CO	Oct 6-8 Madison WI	Oct 25-27 Sacramento CA
	In each case, Day 1 is a travel day, with a group session starting at 7pm; Days 2 & 3 are full training days. Day 3 will wrap up by 4pm. Participants can return home that evening or the next morning.					
Follow-up session online via iLinc (90-120 mins)	To be held after each TTT. Specific dates will be announced.					

Preparing Instructional Teams in each state and territory

Preparing Instructional Teams in each state and territory

1. Attend **Kickoff Webinar** to prepare to observe actual deliveries of ER & REPR courses
2. **Observe ER & REPR deliveries**
3. Participate in **online debriefings** after pilot observations (sessions 1 & 4 of each course)
4. **Attend regional Train -the-Trainer (TTT) Institutes**
5. Participate in **online follow-up to TTTs**

There are five components of the Train-the-Trainer process, outlined at left.

Refer to the table on page 5 to find out when each component will occur in your region.

1. **Kickoff Webinar.** This 90-minute **online** session is designed to introduce Instructional Team members to the complete Train-the-Trainer process and specifically prepare them to observe actual delivery of both courses.

   Schedule: We will hold two Kickoffs, one for Regions 1-2-3 (April 20) and one for Regions 4-5-6 (probably will occur in mid-to-late June or early July).

   Materials: CoSA will post a Participant's Guide for the Kickoff Webinar that you should download and have available for use during the Webinar. We will let you know as soon as it is available.

2. **Observe actual deliveries of the two main courses online: *Essential Records* and *Records Emergency Preparedness and Response***. During the Kickoff Webinar, you will receive guidance on what to look for and how to record your observations. From these observations, you will learn the course content and materials and see firsthand how the courses are to be delivered. You will observe a total of eight sessions—four sessions per webinar—each with a duration of 90 or 110 minutes, **all online**.

   Schedule: Regions 1-2-3 will observe the Pilots for the two courses which are scheduled twice a week on Tuesday and Thursday starting April 27 (ER Session 1) and ending on May 20 (REPR Session 4). Regions 4-5-6 will observe deliveries starting in late June, closer to their TTT Institutes. While it will be best to attend the actual live delivery, we will record the sessions and make them available for anyone who cannot attend during the given times.

   Materials: CoSA will provide copies of the Instructor's Guides for both courses, including handouts and other supporting materials, in advance of the Observations.

3. **Participate in online debriefings about your observations**. Each debriefing will run approximately 30 minutes.

   Schedule: Immediately after sessions 1 and 4 of each course delivery as scheduled above.

4. **Attend regional Train-the-Trainer Institutes (TTTs).** These **face-to-face** institutes will include two full days of training for state Instructional Teams from each of the six IPER regions. During this component, you will receive in-depth instruction about training techniques as well as information on how to use the webinar application as an instructor. You will also be given an opportunity to practice presenting the course and receive feedback from your peers. A major focus will be on mastering the technology and techniques for providing engaging, effective training online. We also hope that bringing state teams together **in person** on a regional basis will allow participants to make important connections across state lines and foster ongoing collaboration.

Schedule: The Institutes begin in July and end in October 2010. We will be informing states in each region of the specific dates for their Institutes.

Expenses: IPER grant funds will cover per diem, travel, and lodging equivalent to the U.S. government per diem for up to three representatives from each state and territory.

5. **Participate in an online follow-up discussion** after each regional Institute. During this 90-minute online discussion, the trainers-in-training will examine how their potential students will interact with the IPER courses and the iLinc webinar application. They will also have an opportunity to ask questions that have arisen since their attendance at the Institute and address any other problems or concerns they might have.

   Schedule: To be held after each TTT. Specific dates will be announced

After your team returns from the Institutes

After the TTTs

- **Annotate your Instructor Guides**
- **Practice – with assistance from IPER Mentors and IPER staff**
- **Contact the IPER staff when you're ready to schedule your webinars**
- **Deliver ER & REPR webinars**

Remember that we may not receive FEMA certifications for the ER and REPR courses until August or September and official offerings of the courses cannot begin until they are certified. However, if your state or territory is in one of the first regions to attend an IPER TTT Institute, you'll be able to use the waiting period to finish your own preparations for course delivery. If your team has more members than those who were able to attend the institute, you will want to pass along what you learned to the rest of the group in keeping with the true spirit of "train-the-trainer!" You will need some time to annotate your Instructor Guides and develop scripts for certain portions if that's your teaching style. You will also want to practice delivering the courses so you can master both the content and the technology. You might consider holding "pilots" of your own for state archives staff or for teams from another state. And finally, once you can schedule firm dates to begin the courses, you'll implement a marketing plan to reach potential students.

Additional support and accommodations

IPER Mentors. To help every state team get up to speed as quickly as possible, we are recruiting a cadre of six to eight **IPER Mentors** who will provide direct and varying levels of support and advice to the state teams, as needed.

We will be inviting applications from individuals who are interested in becoming IPER Mentors shortly. If you or anyone you know would like to learn more about these paid positions, please contact Vicki Walch (vwalch@statearchivists.org) to receive the application package when it is available.

Pacific Territories. We have discussed how best to delivery IPER training in the Pacific Territories with WESTPAS (www.westpas.org), an organization that has been active in training and response activities in American Samoa, Guam, and the Northern Marianas Islands. We hope to be able to build on relationships that WESTPAS has already developed and will be working out details in the next couple of months.

Requests to send more than three people to the TTT Institutes. A few states have already asked if they can send more than their core of three people to the TTT Institutes. We will have to cap attendance at each of the Institutes, both because we want to maximize the experience for the participants and because of size limitations in the facilities. The computer labs we are using will only have a set number of computer stations available.

We will create a waiting list for each Institute to accommodate as many additional participants as possible on a space-available basis. We will give priority for one extra attendee to those states in which the archives and records management programs are administered in separate agencies and then handle other requests on a first-come, first-served basis. If you have other special circumstances you would like us to consider, please contact IPER staff to discuss them further.

We do not have sufficient funds to cover expenses for extra attendees, so we may have to charge extra participants a fee to cover their onsite expenses. They will also be responsible for their own travel and lodging. Extra seats will only be made available after all of the states and territories in the region have been accommodated.

What the Instructional Teams can be doing now

Learn to use iLinc (and practice!)

You don't have to wait until the Institutes to begin mastering the iLinc system. The company has a host of tutorials on all aspects of the system available free of charge. Most are recordings that are available at any time. Others are live, instructor-led sessions. IPER staff will prepare a short list of tutorials that we believe would be most beneficial for the kind of training you will be delivering.

If you don't want to wait, go to http://www.ilinc.com/training/session-leaders and jump in!

Consider practicing in iLinc for an actual presentation of your own. It might be a meeting of your Instructional Team, an online conference for city clerks and other potential students, or a preparedness briefing in advance of hurricane season. If you'd like to schedule time on the iLinc system for a practice session or conference, contact Verna Edwards (vedwards@statearchivists.org).

Learn more about how online training differs from face-to-face training

Most of the individuals who will be on the Instructional Teams have had some experience with traditional, in-person training like workshops. Few of us have had much experience delivering webinars. There are many books and online resources that you could explore. One example is "Learn How to Learn Online" from InSync Training: http://www.insynctraining.com/calendar.htm.

Get submissions ready for the IPER Resource Center

The new Resource Center is in the final stages of development and we are hopeful that it will be functioning well enough by the end of April to use during the ER and REPR pilots. We already have links to many of the state-specific resources that you'll be using during your delivery of the IPER courses. When the Resource Center is ready, each state team will be given its own administrative account so it can coordinate its IPER training activities, update links, and upload additional materials as needed.

While we are in the process of moving existing content to the new site, it would be ideal if you could (1) ensure that the information we have now is correct and (2) locate items listed below for the ER and REPR courses because they are not yet represented in our files.

For the Introduction to Records and Information Management course,

- Check your entries for the Intro to RIM course to make sure they're still valid http://www.statearchivists.org/resource-center/rim/

For the Essential Records course, locate:

- Definitions of essential records in statutes and regulations

- Tools for identifying specific risks in your state, e.g., maps of statewide or local flood zones and other hazards, guidance from the state emergency management agency
- Examples of emergency response and continuity of operations (COOP) plans for your entire state, individual localities, and/or specific agencies

For the Records Emergency Planning and Response course, also locate:

- Contracts that can be activated for records-related emergency response and recovery
- Providers of supplies and services for records-related emergency response and recovery
- Directories of archivists, curators, conservators, and preservation specialists
- Locally available training on recovering damaged records

Answers to some of the questions that arose during the Ask IPER call

Why invest time and effort required into the IPER courses?

IPER provides an opportunity for staff to learn how to deliver effective training over the Web, skills that can be applied to more than just the IPER courses. Using webinar technology makes it possible to reach audiences that are at some distance from the state capital without having to spend time and money traveling around the state, something that might be impossible anyway as tight budgets force severe travel restrictions in many states. We know that many state governments already have webinar technologies in place—some have iLinc licenses, the system that IPER is using—which should help many teams continue well after the IPER project ends. Most of the fundamental methods and techniques that you will learn in your IPER preparation will be applicable to any webinar platform, not just iLinc.

In addition, we believe that the IPER courses will help people better understand the importance of archives and records management. The IPER curriculum repeatedly emphasizes that a sound records management program is the foundation of emergency preparedness for essential records. The potential for significant losses of critical information as a result of disasters can be used to make government officials pay attention to their overall records program. Taking this broader perspective supports those who create and care for government records and information systems, helping them ensure that these critical resources are well managed at all times. Since its inception, the IPER project has worked to strengthen ties among archivists and records managers, information technology staff, and emergency managers, and that remains at the foundation of our goals.

How long will the iLinc system be available for use by the states to deliver the IPER courses?

While the FEMA grant is scheduled to end on March 31, 2011, the terms of the license will make it possible to keep the iLinc system available at least through the end of 2011. CoSA has already begun exploring ways to sustain funding for the licenses and the staffing necessary to provide services related to its use beyond that date. We are cautiously optimistic that the system will remain in place for the foreseeable future. While FEMA funds are supporting its use, access to iLinc through CoSA is available free-of-charge for any state or territory to use for IPER delivery.

How will students register to take the IPER courses we will be delivering?

All students will register for the courses delivered in every state and territory through the IPER Resource Center. Instructors will have access to registration lists for each course offering so they know who has signed up for their courses. They will also have several ways to communicate with students through the Resource Center, including email and discussion lists.

Get to know the IPER staff

We have four staff members based in offices provided by the Georgia Archives in Morrow, Georgia, a suburb just south of Atlanta.

Verna Edwards has been the IPER Curriculum Manager from the beginning of the project in 2008. She has coordinated the development of all of the courses and the Train-the-Trainer program; managed our work with the IPER curriculum contractor, C2 Technologies; and has become our resident expert on all things iLinc, the online system we're using to deliver the webinars. Verna is the principal point of contact for technical issues related to iLinc and for scheduling online practice sessions. She's also our road warrior and will be attending EVERY institute, so everyone will get to meet her!

Irene van Bavel, the new IPER Program Officer, started in January 2010. She is an archivist who managed digitization programs at the Library and Archives Canada and then the Minnesota Historical Society before moving with her family to Atlanta this year. She has already been in contact by phone or email with more than half of the states and territories and will be talking with all of you before long. She will also be developing promotional materials for the courses that states can adapt for their own use and sustaining communications with the teams. Irene is the first point of contact for any general IPER questions. She, together with the IPER Program Associates in Georgia, will manage logistics for the Institutes, including local arrangements and processing travel claims for attendees.

Jennifer Tigner is one of two IPER Program Associates. She joined us in the fall of 2009 and has taken on management of the IPER contact database. It includes information on the state team members as well as our partner organizations and the IPER Advisory Board. She has already begun working on the logistics of getting instructional team members to the Train-the-Trainer Institutes.

James Irby is the other IPER Program Associate. James has been with us part time since the IPER Summit in July 2008. He is responsible for updating, printing, and shipping all IPER promotional materials—including the infamous IPER Orange Folders—along with many "other duties as assigned."

CoSA also has a relatively new staff member in Iowa who is doing work related to the IPER project.

Becky Julson, CoSA Program Associate, is an archivist who completed her MA at the University of Wisconsin Madison in 2009. While she was a student, she worked at the Wisconsin Historical Society, so like Irene she is familiar with the inner workings of a state archives. Becky is currently moving all of the data in the existing online CoSA Resource Center into tables for uploading to the new content management system for the new Resource Center, much of which is specifically designed to support the IPER courses.

Contact information for all staff members is available at http://www.statearchivists.org/iper/IPER_staff.htm.