

Thinking Outside the Borders

was a collaboration of the:

Mortenson Center for International Library Programs

University of Illinois Library at Urbana-Champaign

142 Undergraduate Library, MC-522

1402 W. Gregory Drive, Urbana, Illinois 61801 USA

www.library.illinois.edu/mortenson

and

Illinois State Library

Gwendolyn Brooks Building

300 South Second Street

Springfield, Illinois 62701 USA

<http://www.cyberdriveillinois.com/departments/library/>



Cover graphic created by Josh Schroeder



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“Librarians everywhere are working together to develop strategies and initiatives to deal with the ever-changing global needs of our patrons. Thinking Outside the Borders focuses on a host of issues ranging from preservation of materials and expanding technology to resource sharing and advocacy.”

Open Arms, Open Borders

*Anne Craig
Director, Illinois State Library*

In the rotunda of the State House in Springfield is the statue of a woman with open arms, representing “Illinois Welcoming the World.” The statue, sculpted in plaster by Julia M. Bracken, was first displayed in the Illinois Building at the World Columbian Exposition in 1893. Two years later, the statute was replicated in bronze and dedicated in the capitol.

One of the highlights of the legendary event held in Chicago at the cusp of the 20th Century was the exhibition’s emphasis on the emerging technology of electricity as a driving force for progress. As the 21st Century fast-forwards into the future, ever-developing technological tools that facilitate information exchange and resource sharing are shaping a more compact planet.

On behalf of the Illinois State Library, I had the unique opportunity to welcome librarians from around the world to the first Thinking Outside the Borders leadership institute in international librarianship in September 2005. This was the first conference of its type where librarians from the world and from the United States met together to discuss common issues and challenges facing them. The conference was held with great expectations that it would sow the seeds for mutual and multicultural cooperation that we will all reap for years to come.

Librarians everywhere are working together to develop strategies and initiatives to deal with the ever-changing global needs of our patrons. Thinking Outside the Borders focuses on a host of issues ranging from preservation of materials and expanding technology to resource sharing and advocacy. The institutes have been a successful means of allowing participants to understand common issues; to develop a deeper understanding of how libraries operate in other countries; and to utilize cross-cultural communication networks and strategies.

Illinois Secretary of State and State Librarian Jesse White and the Illinois State Library are pleased to be part of

this important publication. We are also enormously proud of the strong partnership we have forged with the Walter C. and Gerda B. Mortenson Center for International Library Programs that formed the foundation of the Thinking Outside the Borders initiative. We value the cooperation of the Arizona State Library and Archives and Nebraska Library Commission that partnered in this National Leadership Grant activity graciously funded by the Institute of Museum and Library Services.

To ensure that citizens everywhere have access to information that improves their lives, we must work to maintain our libraries as the best and most reliable repositories for information anywhere. This publication can be a powerful tool developing new library leaders throughout the world, as it provides the blueprint for convening similar conferences.

This sort of conference holds much promise. As participants share their ideas and seek solutions to common problems, it should always be remembered that no one, regardless of country of origin, has a monopoly on the right way to do something. Everyone is on the common ground of cooperation and friendship. There will be many valuable experiences and lessons learned during a Thinking Outside the Border institute; but when all is said and done, the most important lesson is that in our world community, the only way to have a friend is to be one.



“Thinking outside of the box has been the hallmark of the Mortenson Center’s success in making a difference to librarians and librarianship around the world.”

Welcome Message

*Paula Kaufman
University Librarian and Dean of Libraries,
University of Illinois at Urbana-Champaign*

The University Library is proud to be home to the Walter C. and Gerda B. Mortenson Center for Library Programs. Guided by the Mortensons’ vision of promoting international understanding and world peace through education and training of librarians and led by two Mortenson Distinguished Professors, - Marianna Tax Choldin and, currently, Barbara J. Ford - the Center has provided professional development and training opportunities to more than 800 librarians from nearly 90 countries. The Mortenson Center’s location at Illinois reflects the University’s national leadership in international studies and commitment to extending the campus to the world and the world to the campus and the University Library’s long-standing leadership in international librarianship.

Thinking outside of the box has been the hallmark of the Mortenson Center’s success in making a difference to librarians and librarianship around the world. Participation in its programs is sought avidly by practicing librarians around the globe and its programs have changed and expanded as the needs of the world’s libraries and librarians since the Center’s founding seventeen years ago. As the clamor for the development and support of library leaders intensified in recent years, the Mortenson Center seized a leadership role by developing the innovative and successful Thinking Outside the Borders program. This program is differentiated from other important and useful leadership development programs, including Synergy (Illinois State Library), the Frye Institute (Council on Library and Information Resources, Educause, Emory University), the Executive Leadership Institute (Urban Libraries Council), the Research Library Leadership Fellowship Program (Association of Research Libraries with university partners, including Illinois), summer institutes at Harvard and Vanderbilt universities and others, by its focus on librarians from a broad array of types of libraries, its mix of participants from the United States, Canada, Africa, Latin America, the Caribbean and Asia, its focus on technology and preservation, its

utilization of a variety of teaching and learning methodologies, and its inclusion of library leaders from around the world.

Those of us who work in academia are often more comfortable interacting and working with other academic librarians, regardless of the country in which we practice. We understand generally the cultures of higher education, we support the teaching, learning, and research needs of scholars and students, and we face similar challenges and opportunities. Librarians in other sectors – schools, public libraries, state libraries, special libraries – share similar affinities with others in similar settings. By purposely including librarians from many countries and all library sectors in its programs, the Mortenson Center's approach to learning helps foster understanding across many borders, both literal and figurative.

Leadership skills are learned skills. The success of Thinking Outside the Borders is characterized by multifaceted learning. Participants concluded their involvement in the program with new leadership skills, new skills in technology and preservation, and new and enlarged understandings of librarianship beyond traditional specialty and geographic borders. It marks an important step in achieving broadened understanding, which leads ultimately to global peace.



“The impetus for Thinking Outside the Borders came from the working relationship and mutual respect that the staffs at the Mortenson Center for International Library Programs and Illinois State Library had forged from a very successful partnership that began in May 2001, when a delegation from Russia visited Illinois.”

Building and Growing a Successful Partnership

Bonnie Matheis

*Illinois Center for the Book & Mortenson Programs
Coordinator, Illinois State Library*

Joe Natale

*Executive Assistant to the Director for Planning
and Outreach, Illinois State Library*

The impetus for Thinking Outside the Borders came from the working relationship and mutual respect the staff at the Mortenson Center for International Library Programs and Illinois State Library had forged from a very successful partnership that began in May 2001, when a delegation from Russia visited Illinois. The delegation was comprised of small town mayors and city officials from small Russian communities. The idea behind the visit was to groom leaders in Russian cultural institutions, including libraries. In return, a group of Illinois librarians went to Russia to see what was implemented as a result of the visit to Illinois.

As a result of that cultural encounter, the State Library began to host Mortenson Associates in Springfield because of its ability to offer programs for the Associates and its location as a base to tour historic sites related to Abraham Lincoln. While these visits were stimulating for both the Mortenson Associates and the State Library staff, it quickly became obvious we could do so much more with the partnership. So, that fall, the Illinois State Library Host Program began.

The host program placed Mortenson Associates in the homes and libraries of librarians statewide. The State Library used its connections with libraries across the state to find the proper libraries to host the international librarians. The strategy for Illinois library placement was to try to match closely the size and type of library along with those that could cater to the special interests of the international librarians. The original goal of the Illinois Library Host Program was two-fold: 1) it would give the international librarians the opportunity to observe first-hand the day-to-day operations of libraries in Illinois; and 2) it would give the Mortenson Associates the opportunity to share information and stories about libraries in their countries. As of 2007, 46 Illinois libraries have hosted a total of 103 Mortenson Associates.

The host program far exceeded its expectations, allowing international librarians to form strong professional and

personal bonds with each other and their host librarians. This created a total turn-around in thought because the Associates were teachers as much as they were students; and Illinois librarians were students as much as they were teachers. Both learned much about each other, their families and their nations' governments, religions and climates. Both discovered that there was more that united them than divided them. Both shared the same professional concerns, such as networking, cross-cultural communication, preservation, advocacy, disaster preparedness, leadership, best practices, serving diverse populations, innovative services, problem solving, negotiation, international issues and funding. From this, the idea for Thinking Outside the Borders was born.

The international leadership training components of the initiative were based on the leadership programs hosted by the Mortenson Center and the State Library. The Mortenson Center offered its first leadership institute to Mortenson Associates in October 2001, and refined the curriculum each time it was repeated, including a three-day leadership institute in San José, Costa Rica in December 2003. While the Mortenson Center was concentrating on international librarians, the State Library initiated the Synergy library leadership initiative in 2003. The goal of Synergy was to offer a program that recruited and nurtured library leaders in Illinois. One of the objectives was to help librarians understand the local, state, and global environments.

A literature review was conducted in the grant application phase, and it was discovered that there was an increased emphasis on leadership in library and information science. Not surprisingly, over the past few years, many organizations have started offering these types of institutes. In fact, the Association of Research Libraries has developed a registry of 25 library leadership development programs. The need for this project became clear upon the review of the content of several leadership programs (Harvard Program of the Association of College and Research Libraries, the Frye Leadership Institute, the University of California at Los Angeles Senior Fellows Program, the Urban Libraries Council, Leadership for Public Libraries, and the Snowbird Leadership Institute.) There are many differences among these institutes, but it is clear that they did not focus on engaging participants in the discussion and understanding of global library issues. None of the institutes were designed to meet the needs of a diversified audience of U.S. and international librarians.

There was also an increasing interest in international librarianship in Illinois due in part to the rising Hispanic and Latino population in the state. The 2000 census indicates that in Illinois, the Hispanic or Latino population (of any race) is 12.3 percent (1.5 million of 12.4 million people) mirroring the federal census of 12.5 percent (35 million of 281 million people). The Hispanic or Latino growth rate in Illinois between 2000 and 2006 was 22.2 percent. In Illinois, there are counties that reach or exceed the state and national census percentage of Hispanic or Latino: Boone County (12.5 percent); Cook County (19.9); Kane County (23.7); and Lake County (14.4). At Rolling Meadows Library in Cook County, the Hispanic and Latino population is 4,725 of 24,604 people. As a result, the library has hired one staff member from Spain and another from Argentina. In Beardstown in Cass County, 1,032 of 5,766 people are Hispanic or Latino, resulting in a major social and cultural change in the Midwest community.

The staffs of the Illinois State Library and Mortenson Center began working in the fall of 2003 on a National Leadership Grant to be submitted to the Institute for Museum and Library Services (IMLS). The partners requested \$350,000 from IMLS to support the Thinking Outside the Borders initiative in Illinois. The major activities for the proposal were

to convene a three-day leadership institute for Mortenson Associates and Illinois librarians in the first year, and to convene a three-day leadership institute for international librarians and librarians from around the United States in the second year. The goals of Thinking Outside the Borders were as follows:

1. To pilot-test and develop a leadership training module that engages both United States and international librarians;
2. To involve United States and international librarians in a dynamic and cross-cultural discussion of common challenges;
3. To develop in United States librarians an understanding of the impact of global issues on their local context;
4. To encourage United States librarians to reexamine current services and collections in light of multicultural and global trends; and
5. To develop a training module that could be adapted and used by librarians in other countries.

The stated outcome of this project in the grant proposal was to provide the impetus for other states, library organizations, and countries to develop library leaders in a global community. To the partners' surprise, Institute for Museum and Library Services gave a conditional approval of the proposal, requesting that additional states be recruited to offer leadership institutes at the state level, and a technology component for Mexican librarians be incorporated into project activities. The Illinois State Library asked the Arizona State Library and Archives and the Nebraska Library Commission to join the Thinking Outside the Borders partnership because of their demographics.

The Hispanic or Latino population represents 7.4 percent of Nebraska's population of 1.7 million people. In Nebraska, there are counties that reach or exceed the state and national census percentage of Hispanic or Latino: Colfax (33.3 percent); Dakota (29.8); Dawson (30.3); Hall (18.8) and Scotts Bluff (18.5). The Hispanic or Latino growth rate in Nebraska between 2000 and 2006 was 36.9 percent. The Hispanic or Latino population represents 29.2 percent of Arizona's population of 6.1 million people. In Arizona, there are counties that reach or exceed the state and national census percentage of Hispanic or Latino: Cochise (31.6 percent); Greenlee (45); Pima (32.5); Santa Cruz (80.6) and Yuma (55.9). The Hispanic or Latino growth rate in Arizona between 2000 and 2006 was 37.3 percent.

With commitments from Arizona and Nebraska, the Illinois State Library submitted a revised project narrative and requested an additional \$150,000 for the initiative as requested by IMLS. As soon as final approval was given, the State Library and the Mortenson Center began planning for the first institute in Illinois, and developing programs and procedures for Arizona and Nebraska to adapt for the leadership institutes in those states.

As the borders between individuals and nations melted away, librarians from Arizona, Illinois, Nebraska, Mexico, South America, the United States, and around the world learned as much about each other as individuals as they did about the core components of negotiations, empowerment, fundraising, advocacy, preservation, and technology. They learned that they all shared what President John Kennedy identified as humankind's "most basic common link" in a diverse world: We all inhabit this small planet. We all breathe the same air. We all cherish our children's futures. And we are all mortal.



“Librarians must develop cross-cultural communication skills including the ability to listen, learn, exchange ideas, and understand local needs in a global context to work successfully in a global context and find the balance between global and local perspectives.”

A Global Leadership Context for Librarians

*Barbara J. Ford, Director, Mortenson Center for International Library Programs,
University of Illinois at Urbana-Champaign
Susan Schnuer, Associate Director, Mortenson Center
for International Library Programs
University of Illinois at Urbana-Champaign*

The increasing effects of globalization on societies and institutions everywhere and the increasingly interconnected and interdependent world mean that librarians need to have a global perspective in order to best serve their users. Libraries are natural organizations to encourage global collaboration because they can serve as repositories for large quantities of reliable information. The founding of global communities across international and cultural boundaries empowers people, insofar as groups can share and organize information when and how they choose.

Global perspectives can allow local unique cultures to thrive and be protected. To accomplish this goal, there must be the right balance between global and local needs. Librarians must develop cross-cultural communication skills including the ability to listen, learn, exchange ideas, and understand local needs in a global context to work successfully in a global context and find the balance between global and local perspectives.

Since 1991 the Mortenson Center for International Library Programs at the University of Illinois at Urbana-Champaign has been a center for continuing education for international librarians from over 80 countries. We value the opportunity to learn from and share expertise with colleagues from a variety of countries and cultures. Over the years we have received a number of requests to offer a leadership institute for librarians in an international context.

Library Leadership in a World Community

“Thinking Outside the Borders: Library Leadership in a World Community” was conceived as a way to engage librarians in the discussion and understanding of global issues. The grant funded by the United States Institute of Museum and Library Services aimed to meet the needs of a diversified audience of United States and international librarians through the development of

leadership institutes. With our partner the Illinois State Library, the Mortenson Center for International Library Programs at the University of Illinois at Urbana-Champaign, prepared the proposal and developed four institutes and two pre-conferences. Institutes were developed with the Arizona and Nebraska State Libraries and presented as pre-conferences at the American Library Association and Illinois Library Association as well as in Illinois. We drew upon partners from around the world for assistance and advice in developing and presenting the leadership institutes.

Defining library leadership and its characteristics is a difficult task especially in an international context. Drawing on research and personal experience, Mortenson Center staff developed leadership institutes aimed to navigate across cultural and linguistic differences.

Focusing on content is not always the best strategy when working with an international audience. Concentration on the journey is critical to the success of professional development events, and in many cases the journey is the destiny. The Mortenson Center staff used several guiding principles to develop the journey for the Thinking Outside the Borders Institute.

Guiding Principles

The principles drove the selection of the content of this institute and weaving the various pieces together was at times messy and difficult. There were many lessons learned from each institute and those lessons were used to hone future institutes.

Global Leadership Qualities

There are leaders in every culture, in every country, in every organization. The identification of the most important characteristics depends on context and culture. Leadership in this institute is defined broadly, looking at it from various viewpoints. Here are three definitions that help set the context for this institute.

“Leadership is the relationship of influence between at least two people, not necessarily related to position, who strive towards a shared purpose which results in meaningful and substantive change.” Mary Ann Mavrinac, Chief Librarian, University of Toronto Mississauga, 2007

“A person with ubuntu is open and available to others, affirming of others, does not feel threatened that others are able and good, for he or she has a proper self-assurance that comes from knowing that he or she belongs in a greater whole and is diminished when others are humiliated or diminished, when others are tortured or oppressed.” Archbishop Desmond Tutu, 1999

“Multicultural Awareness: be experienced and comfortable working with individuals and managing organizations across different geographic, demographic, and cultural borders.” Campbell Leadership Descriptor, 2002

International Leadership in Action

The Thinking Outside of the Borders Institute is firmly grounded in the practical and daily application of leadership. Experts with international library leadership experience

were invited to speak about leadership from their own perspective. Hearing individuals from different countries reflect on their work moves a theoretical discussion of leadership into a realm that is closer to the lives of the participants, and therefore more easily attainable. Their presentations also served to highlight similarities and differences amongst leadership styles.

A Space, a Place, and a Time

The Mortenson Center hosts many librarians from around the world every year. As part of their program, the visiting librarians tour United States libraries and hear presentations from United States colleagues. Over the years the Mortenson Center has also worked to create a voice for the visiting librarians in United States activities, for example, every year the Mortenson Center visiting librarians attend the Illinois Library Association conference and present a session where they describe the work in their home libraries.

Giving a voice to each participant at the institute was at the core of this institute. To create that opportunity, careful consideration was given to the space (meaning the context of the institute), to the place and to the time. The list below illustrates the strategies that were used.

- *Moving Outside of the United States Context*

Given that all the institutes were located in the United States, the organizers intentionally moved from a traditional United States experience into a more loosely delineated experience, one that took participants outside of their comfort zone. Speakers from different countries, using languages other than English, and presenting content that was not always considered to be “leadership-related” were all strategies used in this institute.

- *A Level-Playing Field*

In an international professional development context, participants from developed countries can at times dominate a discussion because they have had more exposure to recent trends and technological tools. The goal in this institute was to create a learning environment for everyone. The topic of disaster preparedness is an excellent example of using content to create a level-playing field. All libraries can experience disasters, few librarians are prepared to handle a disaster. Everyone approached this part of the institute in a learning capacity.

- *Time and a Place*

Developing an environment of trust and inclusion cannot be rushed, cannot be forced, cannot be taken for granted. To create that space, one must allow time and opportunities for participants to gather together in informal and formal settings. Meals were organized so that participants could come together and talk. Presentations often offered opportunities for small group work; even time for individual reflection was part of one of the institutes. The venues of the institutes were chosen because they were welcoming. Attention to these small details helps create an environment where trust is established and inclusion is practiced.

Connecting Though Local Touch and Global Reach

One of the goals of the institute was to establish relationships that would continue after the institute. Another goal was to learn to use technology to create a larger international presence on the World Wide Web. The development of partnership projects was one strategy used to give participants a platform for future collaborative projects. In addition, sessions

on digitization and the Web 2.0 were offered as a means of making local content more widely available.

The institutes provided opportunities to develop a deeper understanding of the variety of perspectives to be found in our global library world. We learned a lot. We had fun. We developed and practiced new skills. We saw the importance of adaptability, engagement, and dynamic cross-cultural discussions. We continue to think about the colleagues we met and the experiences we had together. We hope that the materials presented here will allow others to develop their own international library leadership programs.



“In Thinking Outside the Borders institutes, the journey is the destiny.”

How to Facilitate an International Institute

Barbara J. Ford, Director, Mortenson Center for International Library Programs, University of Illinois at Urbana-Champaign

Susan Schnuer, Associate Director, Mortenson Center for International Library Programs, University of Illinois at Urbana-Champaign

In Thinking Outside the Borders institutes, *the journey is the destiny*. Facilitators wanting to repeat this institute will realize that they cannot rely on their previous experiences when organizing a professional development event. Instead of concentrating solely on the content of the event, the facilitator must also focus on creating a context that will be welcoming and open to all. Here are some guidelines that might help create that context.

Guidelines and Goals

Guidelines for the leadership institutes included:

- Participants would be practicing librarians evenly split between U.S. librarians and librarians from other countries.
- Speakers would be from the U.S. and other countries.
- While the institute would be in English much of the time, other languages might also be used at times.
- Presentations and activities would be new to all participants to create an even field for learning and interaction.
- Content for the institute would be based on concrete concepts common to all librarians such as disaster-preparedness.
- Institutes would include a mixture of lectures, workshops, large and small group activities, a simulation game, and a project for the participants.
- Institutes would be residential, providing ample opportunity for the participants to mix in informal situations.

- Development of the context of the institutes would take place in collaboration with the international partners of the Mortenson Center.

Leadership institute goals included:

- Establish common language for talking about leadership and better understanding of leadership traits in a global context.
- Develop cross-cultural communication strategies.
- Gain deeper appreciation and understanding of the context of library operations in various countries.
- Build lasting professional relationships with librarians from different countries.

Content and Organization

Having determined the guidelines and goals, the content of the institute was defined. It included advocacy, cross-cultural communication, and negotiation as skills needed by librarians today. Disaster preparedness was added since these issues pose potential, real-life problems for most libraries and most librarians have little training on these issues. The topics were introduced in a tabletop exercise that mimicked a library disaster where participants could apply their cross-cultural communication and leadership skills in an emergency situation.

A variety of modules were developed to accomplish these goals and other authors in this publication describe some of the modules that they developed and presented for the institutes. The institutes involved librarians in a dynamic and cross-cultural discussion of common challenges and opportunities and focused on leadership in an international context. U.S. librarians developed an understanding of the impact of global issues on their local context and were encouraged to reexamine current services and collections in light of multicultural and global trends.

The leadership institutes took place over several days with participants staying in a local hotel. A typical schedule was:

Day 1

Reception – Welcome and Greeting

Administration of Leadership Assessment Tool

Day 2

Introduction of Partnership Projects

What It Means to Lead in the International Library World

Strategies and Skills for Cross-Cultural Communication

Leadership Assessment Tool – Analysis and Discussion

A Cultural Simulation Game

Day 3

Library Advocacy

Diversity and Multiculturalism in Libraries

Day 4

Disaster Preparedness or Technology

Presentation of Partnership Projects

This publication includes examples of modules used for the institutes supported by the grant. A number of institute presenters have written chapters to share what we learned and give ideas for others who may want to set up an institute.

The leadership assessment tool we used was the Campbell Leadership Description which we selected after reviewing a number of tools since it is relatively easy to administer and includes a trait called 'multicultural awareness' that measured the following skills: has a global view; is culturally sensitive; is globally innovative; provides an effective global leadership image; and is internationally resilient. Mary Ann Mavrinac provides details on the tool and its use. Partnership projects were developed to broaden the impact of the institutes and Dawn Cassady gives information on how these were developed. What it means to lead in an international world was presented in a different way at each institute. Carol Brey-Casiano, Clara Budnik S., and Ujala Satgoor provide excellent inspirational examples of responses to this important question. Strategies and skills for cross-cultural communication were addressed with a variety of approaches by Kathryn Deiss and Sandra Ríos Balderrama and Ujala Satgoor.

Cultural simulation games gave institute participants the opportunity to interact and learn in different ways. Pamoja, discussed by Susan Schnuer, and World Café, discussed by Sandra Ríos Balderrama, were two tools that worked well for the institutes. Carol Brey-Casiano was a presenter on library advocacy and her presentation is one approach that can be taken to raise awareness about this important topic. Diversity and multiculturalism in libraries was a theme throughout the institutes. Elizabeth Pierre-Louis and Sandra Ríos Balderrama and Ujala Satgoor address these important topics in interesting and useful ways. Alyce Scott's workshops on digitization were a highpoint of the institutes for the international librarians who participated. Michael Sauers' library 2.0 presentation at one of the institutes was very well received and a practical module that could be used by all participants. Disaster Preparedness was a concrete useful module with a table top exercise prepared by Thomas Claeson, Julie Page, and Thomas Teper. Debra Wilcox-Johnson evaluated and assessed the project and provided useful feedback as the institutes were modified based on lessons learned.

The leadership training modules developed in the grant were planned to be flexible, so that an entity adapting the program could select the topics it found relevant for its situation and provide training programs of varied duration. The curriculum utilized a variety of teaching strategies including simulation games, leadership assessment tools, lectures followed by group discussions, and case studies. The institutes offered a diversity of presenters in terms of style, presentation, and teaching methods in order to embrace various learning styles. In short we used diversity to reach diverse audiences.

Among the outcomes expected were learning cross-cultural communication strategies. Participants gained a deeper appreciation and understanding of the context of library operations in other countries and they came to understand some of the implications of international library standards and policies. Most importantly they developed some problem-solving skills useful in international situations. As always happens in these kinds of programs, lasting relationships with librarians from different countries were developed and have led to additional collaborations and learning.

Develop Your Own Library Leadership Institute

Building trust and discussing leadership in various cultural contexts was an important part of the institutes and assessment tools were helpful in this. While there are universalities in how we look at leadership there are differing cultural and national perspectives on what the words “leader” and “leadership” mean. At some of the institutes, sessions were presented in other languages in order to place United States librarians in the situation they do not often experience. Although the institutes occurred in the United States, they were not intended to be a ‘typical’ experience for the participating librarians from the United States. All participants (including the presenters) found themselves outside of their zones of comfort at some point.

Joan Clark from the Arizona State Library had this to say about running this institute, “The program exceeded all of my expectations, and my expectations were high. I’ve created and managed many programs for a variety of audiences and this one had to be in the top three of a 25 year career. On top of that, it was fun!”

Nebraska Library Commission also offered the institute in the fall of 2007. Laura Johnson, the organizer, commented: “The Nebraska Library Commission brought Thinking Outside the Borders to Nebraska because it delivered an opportunity for international exposure that would have been difficult for many Nebraska librarians to duplicate.....The program planning was important, but the logistical planning was far more complicated and time-consuming. Commission staffers pitched in and helped to a great degree—that was one of the highlights of the experience for me, the way that people pitched in and helped.”

Joan Clark also offered some very practical advice on running this institute: “No one person could have managed all the logistics during the program. Given the compressed two-day schedule, we couldn’t afford to miss a beat. The support and participation of the entire Library Development Division Team was invaluable. I had outlined the program minute-by-minute for my colleagues, and each one had specific assignments. Everything came together so well that minor problems (like the unexpected and unexplained big box that arrived for one of the participants) were solved without anyone noticing. We all benefited from participating since everyone contributed something to the program’s success.”

Evaluating institutes of this type is not simple. Activities resulting from the institutes include new library advocacy efforts, improved working relationships, use of learning modules presented at the institutes, changes in library practices, development of joint international projects, and expanded networking with international colleagues. It is a challenge to move from awareness to knowledge to experience cross-cultural improvement. Practicing these skills so change is not so jolting and can be better dealt with when working in an international setting is essential.

A Wonderful Journey

At the Mortenson Center for International Library Programs we know that learning never ends. We are very pleased to have been able to offer these institutes with participation from over 200 professionals from more than 20 countries and 10 U.S. states. Our goal here is to provide ideas that you might use to present leadership institutes in your libraries or library associations. While what we did may not be exactly what will work in your setting or country we hope that the materials presented here will give you ideas on how to develop your own leadership institutes.

We end with a special thanks to our partners, colleagues, and friends. Strong partnerships are essential to carry out programs like this. Paula Kaufman at the University of Illinois and Jean Wilkins and Anne Craig at the Illinois State Library gave us the administrative support we needed for the projects. Bonnie Matheis and Joe Natale at the Illinois State Library played very important roles in the entire project working with other Illinois State Library staff to make the grant a success. Joan Clark at the Arizona State Library and Laura Johnson at the Nebraska Library Commission organized the institutes in their states with the support of their state librarians and other staff. Sandra Ríos Balderrama pulled together this publication so that others can learn from and build on what we did with the support of the U.S. Institute of Museum and Library Services. Institute presenters, many of whom wrote chapters for this publication, made it all a reality. Long term Mortenson Center partners from South Africa, Haiti, Costa Rica, and Canada contributed their ideas and expertise. The participants shared their enthusiasm and insights with one another and greatly enriched the journey.

Note: For further reading: *“Developing an International Library Leadership Institute: Thinking Outside the Borders” in Continuing Professional Development: Pathways to Leadership in the Library and Information World, Munchen: K.G. Saur, 2007, p.40-56, with Susan Schnuer and Debra Wilcox Johnson.*



“Learning new behavior - new or enhanced skills - is the most powerful outcome of training. Behavioral change is the most difficult outcome to achieve, but may be the most important.”

Evaluating Training

*Debra Wilcox Johnson
Johnson & Johnson Consulting*

Evaluating the outcomes of training is a challenging task. The goal is to assess changes in three areas: knowledge, attitude, and behavior. Acquiring knowledge—concepts or facts—ranges from orientation to becoming an expert. Changing attitudes—values, beliefs, or feelings—means rethinking ideas, considering alternative views, or forming attitudes about new topics and issues. Learning new behavior—new or enhanced skills—is the most powerful outcome of training. Behavioral change is the most difficult outcome to achieve, but may be the most important.

Evaluation information is collected essentially three ways: questionnaires, interviews, and observation. Evaluation can occur prior to the event, during the training, or following the activity. Often, a combination is used. Pre- and post-test models also can be used and work well for skills training, such as technology workshops.

The most common approach to assessing training is self-assessment by participants. This method asks participants to rate their own changes in attitude, knowledge, and behavior. Evaluation conducted at an event can ask about changes in attitude and knowledge, but it primarily addresses *planned* changes in behavior. The exception to this would be changes in demonstrated skills, such as those in technology training. Documentation of behavior change that occurs in the workplace after training needs to be collected after the training. This information can be collected by evaluators chiefly via questionnaires and interviews.

Organizers and trainers also gather evaluation information via observation. This observation aids in adjusting the training during an event and provides another perspective on learner participation and changes. For example, observers can note variances in level of participation in discussions or lack of attention to a particular topic. Guidelines should be established for the observation, especially if using participants or other people to observe an event. This helps assure consistency in the observation process. In addition, for in-house training, supervisors can directly observe changes in behavior.

Evaluation Process for Thinking Outside the Borders

Since the goal of Thinking Outside the Borders was to develop individual training modules that could be used independently by other organizations and trainers, a model of continuous improvement guided the evaluation process. Feedback from the evaluation process and use of a planning committee helped to assure that changes occurred throughout the project.

Evaluation information was gathered in multiple ways. Written questions and observation were used during the event. Interviews with planners and questionnaires were used following the event.

Expectations

Participants were first asked about their expectations for the institute. The purpose of this was to determine the uniformity of understanding about the goal of the training and to potentially help interpret the responses to the institute by participants. Each person was asked to respond to two questions prior to the training: 1.) What are your expectations of the Thinking Outside the Borders program? 2.) What do you hope to learn from this institute? Responses indicated that a great variance of perspectives existed about the purposes of the training. The most consistent outcome expected by participants was building an international network of colleagues.

Leadership assessment

The institute used the Campbell Leadership Descriptor as a tool for self-assessment of leadership skills. To assess the usefulness of this tool for an international audience, participants were asked to complete a short questionnaire during the evening following its application. Three questions were used for this activity.

- How did your previous perceptions of your leadership abilities change as a result of the leadership assessment (Campbell)? If there was no change, please indicate this.
- What leadership skills do you feel you need to develop further? If none, please indicate this.
- What are two activities you will carry out as a result of the assessment of your leadership skills? If none, please indicate this.

This evaluation process showed that almost all participants identified changes in perception and all identified leadership skills to further develop. The third question was used to help participants plan on follow-up activities and provide insights into planned changes of behavior. Patterns in responses also suggest future training activities, with diplomacy, entrepreneurialism, and management identified most often across the four institutes.

Other data collection during the event

Evaluators also can gather information during an event by using flip charts and adhesive notes. For example, during the first institute, participants were asked to name international leadership skills on one day and specific learning from the disaster preparedness session another day. The question was written on flip charts and participants wrote answers on adhesive notes. This allows for a quick assessment, and the responses can be easily grouped

and shared back with the participants and planners. This is a quick and flexible way to gather evaluative information during training.

Observation

In addition to the invited learners, members of the planning committee and others attended the institutes. This group was asked to be observers for the training. The goal was to observe presenters, participants, planners, and the interaction among these people. Each observer was asked to write down their observations using the following guidelines.

- Level of engagement of participants during presentations and exercises.

Are people attentive? Were they engaged in other activities rather than listening to presenters or note taking?

- Response of participants to content in the presentations.

Were people listening more intently or taking more extensive notes at certain times during presentations?

- Questions asked during the institute related to content and logistics.

- Inclusiveness of all participants in the discussions and exercises.

- Problems or barriers to communication in discussions and exercises.

- Leadership occurring in the discussions and exercises.

Is leadership shared? Is there a discussion of who will lead?

- Conversations you hear about the institute content or logistics.

- Ability of the presenters and facilitators to communicate ideas to the group.

- When did the audience seem confused by an explanation? How well were presenters and facilitators able to answer questions?

- Changes in session attendance.

- Informal interactions among members of the group, especially cross-cultural exchanges.

- Differences in response to the institute from the international and United States librarians.

- Planning committee coordination.

The written observations were used by the evaluator and became the basis for the debriefing telephone conference with planners that occurred after the institutes. The follow-up telephone interviews allowed organizers to reflect on what worked well and what needed further development. These discussions had a major impact on decisions regarding future institute activities, as clear changes occurred from one institute to another.

Questionnaire

The primary method used for participant feedback was a written questionnaire sent via email to all participants. This was distributed four-to-six weeks after the event. Two follow-up reminders were sent. The exception to this process was the last institute in Nebraska. Since this event occurred near the end of the IMLS grant, the questionnaires were gathered immediately after the institute.

The questionnaire asked about expectations, usefulness of individual sessions, effectiveness of presenters, and amount of learning in specific topic areas. These questions used five-point rating scales to gather information. For usefulness, participants were asked to choose from a scale ranging from *extremely useful* to *not useful*. For presenters, the five choices were:

- Inspirational and informative
- Enhanced my learning
- Okay
- Detracted from my learning
- Terrible

To assess their learning, participants were asked to rate how much they learned on a variety of topics. This scale ranged from *a great deal* to *nothing*. The questions elicited a range of responses, although in all cases the majority indicated that they learned *a great deal* or *a good amount* about at least one of the topics. This, of course, varied by topic and institute as did the rankings in the group of responses. At the second institute, for example, the group indicated they had learned the most about disaster preparedness. International librarians, however, reported learning the most about leadership, while for the U.S. librarians it was cross-cultural communication.

Because a desired outcome was building an international network, participants also were asked, “How many of the participants did you meet and talk to by the end of the institute?” The choices were *just a few*, *some*, *about half*, *the majority*, and *everyone*. For all the institutes, almost all the participants indicated either *the majority* or *everyone*.

All the rating questions accomplished three things: 1.) showing differences among the international and U.S. librarians, 2.) providing overall ratings for the institute, and 3.) offering an efficient method for analysis. Across the institutes, U.S. librarians tended to rate the usefulness of the program sessions lower than did international librarians. Why this is the case is not clear. Is it because U.S. librarians participate in a wider range of training and, therefore, are more critical? Would the reverse be true if the U.S. librarians had traveled to another country for the training? Many of the U.S. librarians indicated that they had already participated in some form of leadership training, which may have affected their ratings on that topic.

As each institute evolved, the results of the evaluation affected the design of the institute. One area of the training that changed for each institute related to the topic of multiculturalism and diversity. Program design and content varied. Working together, sharing information about local library services and issues, and social events afforded multiple opportunities

to broaden multicultural perspectives. Yet, when asked to rate the usefulness of sessions on this topic and the amount learned about multiculturalism and diversity, these ratings tended to be lower when ratings for each topic were ranked. By design, the participants made up a multicultural group so that learning could occur naturally, yet it was difficult to satisfy the needs of the group in this topic area. As the institutes evolved, however, more opportunities for sharing among participants were developed, which resulted in more formal information sharing about local library services.

Another method used in the questionnaire to assess changes were three open-ended questions.

- In what way(s) did the institute influence your global awareness of library issues and services? If it had no influence, please indicate this.
- How did this institute help you build relationships with librarians from other countries?
- What do you think you will use the most from your participation in this institute?

The responses to these questions provided perspectives on the institute in the participants' own words. The answers gave a more in-depth view of the impact of the institute on learners. These comments illustrated the value and outcomes of the institute and illuminated the results from the rating scales. Because learners come to training with varied backgrounds and expectations, the most significant outcome of the training varies. It is in these responses that the impact on individuals is most evident.

Typical of training evaluations, several questions were asked about the agenda and local arrangements. These included questions about what program sessions to delete or add.

Interviews

While not used for these institutes, evaluative information could have been collected using interviews. Individual interviews by telephone or in-person focus groups would allow an evaluator to probe for deeper understanding of responses from learners. The questionnaire, however, is an efficient method for gathering information from an international audience, but trainers need to consider the option of interviews if the circumstances would allow for this type of evaluation. A focus group immediately after training could be another approach to gather initial feedback from participants.

Follow-up

For three of the institutes, follow-up questions were sent to participants several months after the event. The goal of this data collection was to elicit examples of impact from the training, especially behavior changes. The biggest challenge was garnering feedback from more than a few participants. In the case of the second institute, international and U.S. librarians were paired to undertake a partner project after the institute. Over half of the participants responded to a request for updates on the partnerships. The main impact was in maintaining communication with the partner, and some sharing of materials occurred. Limited time was listed most frequently as a barrier to more activity between partners. While getting learners to provide follow-up information is challenging, it can illustrate long-term effects and also reinforces the learning that occurred at training. Maintaining

blogs was not part of the project design, but efforts for group communication met with limited success.

Other Considerations

Efficiency and effectiveness are two critical issues in evaluation. While multiple strategies can be used to gather evaluation information, realistically there is a limit on the amount of time most organizers and trainers have for evaluation. In addition, repeat demands for feedback from training participants can have a negative effect on their view of the learning experience. The goal is to focus on what are the most important outcomes to document. This focus helps to assure that efficient information gathering centers on the results that have the greatest impact on improving training.

Follow-up with training participants is the ideal method for measuring the long-term impact of training. The challenge, however, is maintaining contact and the learners' willingness to participate in the feedback process.

While email has simplified contacting participants, it is extremely difficult to get feedback from a majority of participants. Without a powerful incentive, evaluators will be frustrated by low responses after the event. This feedback—especially related to changes in behavior—still makes follow-up a valuable strategy, but evaluators will have to be realistic about the level of participation.

The longer the time period after the training, the more difficult the follow-up process is. Telephone interviews can be effective for follow-up, but time and cost factors often rule out this approach. This would be more manageable if the evaluator used a small sampling of participants for the telephone interviews.

Multiple factors affect the outcome of training. Planners and trainers do not have exclusive control over the outcomes, as learners come to an event with varying backgrounds, skills, and perceptions. In addition, environmental factors (e.g., weather, facility) have an effect.

Receptivity of a library to the person who attended training is a major factor in retention of learning. If the participants are unable to incorporate changes in their work or there is a lack of interest in the training information by the library, it is difficult to make use of new information. When people return to work, a full workload also works against continuing the learning and building on a new network of colleagues from the training.

Learner needs vary, but careful attention to the needs of adult learners will help assure that training is effective. Adults bring a great deal of experience to training, so that experience needs to be integrated and related to new learning. Adult learners tend to be oriented toward application of learning, so the relevancy of training to current and future needs is critical. Multiple learning styles and different paces for learning also need to be considered in the design of training. By taking into account some of the basic principles of adult learning, trainers and organizers can help to increase the impact of learning activities.

Conclusion

Evaluation of training addresses both learning and the quality of training. Determining what works, i.e., best practices, is a desirable result of the evaluation process. During the evaluation process, information on desired training or future learning needs also can be collected. This needs assessment component adds value to the evaluation process.

It is, unfortunately, too easy to concentrate on the design and marketing of training and ignore evaluation. Nevertheless, in the business of training, organizers and instructors also need to keep learning. This is an essential function of evaluation. By focusing on the most important information needed and designing an efficient process, a continuous learning model can be applied to training activities. In this scenario, all those involved in the learning process benefit.



“...leadership development starts with self: self awareness through reflection and insight that will lead to development and change.”

Learning About Self: Campbell Leadership Descriptor

*Mary Ann Mavrinac
Chief Librarian, University of Toronto Mississauga*

Introduction and Context

Rarely has the need for effective leadership in the library and information profession been more pressing and exciting. We live in a global context, a context that in many ways is being shaped by networked technology. Information is rapidly exchanged in a borderless environment, facilitating opportunities for networking, partnerships and collaboration that belie geographic constraints. Information consumers are increasingly content creators, contributing to the exponential production of information in all mediums. Before, a library was a destination point. Now libraries are one stop on the information highway, either an “in person” visit or an electronic exchange.

In this global context, libraries play a unique and vital role in our communities whether providing information to children orphaned as a result of AIDs or through mass digitization projects to make unique material more accessible to the world. Libraries continue to be viewed as important institutions for access to information, literacy, service and education. Against this backdrop, many libraries face increasing pressures such as greater accountability to funding agencies, declining budgets, competition from other information providers, increased demands for services, technological change, legacy systems, and the organizational challenges that result when rapid change is afoot. Effective leadership is urgently needed for survival, much less success, in this challenging and exciting environment. Edgar Schein (2004) encapsulates the environment in which we work:

We basically do not know what the world of tomorrow will be like, except that it will be different, more complex, more fast-paced, and more culturally diverse. This means that organizations and their leaders will have to become perpetual learners. (p. 393)

Leadership development is about learning, learning about the essential elements of effective leadership, learning about one’s leadership strengths and areas in

need of improvement, and in turn, striving to make the necessary changes to develop one's leadership abilities. Learning is, at its most basic, change (Mavrinac, 2005), and change is an essential element of leadership. It is important that leaders cultivate an environment for learning in their organizations to embrace the exciting complexities, diversity, challenges and opportunities of this global information context.

This chapter will discuss the *Campbell Leadership Descriptor*, a self-assessment tool for leadership development. It focuses on essential, universal leadership components that are applicable no matter where one lives and works and at every level in every type of organization. The Descriptor includes a multicultural component that speaks to the importance of developing leadership strengths for a global environment. This instrument is based upon the tenet that "self-awareness of one's leadership style is an essential first step in identifying key strengths, targeting areas for improvement, and creating a successful action plan for development." (Campbell, 2002, p. 92)

Before describing the *Campbell Leadership Descriptor* in greater detail, it is important to establish a baseline discussion for the topic of leadership, starting with a working definition:

Leadership is a relationship of influence between at least two people, not necessarily related to position, who strive towards a shared purpose which results in meaningful and substantive change.

Effective leadership—leadership that inspires and empowers all members of the organization—is critical to the health of the library and information profession and its members. In the context of this discussion, leadership is viewed as a social influence process whose primary outcome is change (Bennis, 1999; Burns, 1978, 2003; Dvir & Shamir, 2003; Hollander, 1992). Leadership is a dynamic process between leaders and followers or between peers. This influence process is persuasive but it should never be coercive (Burns, 1978).

Each of us can be a leader. Leadership is often viewed hierarchically embodied in management positions at the top of the organization. However, an environment of rapid and ubiquitous change demands approaches that are nimble, flexible and proactive. This can only be accomplished when the capacity of all organizational members is realized, where leadership development opportunities permeate the organization. This leverages strength, builds capacity and provides greater opportunity for organizational success (Pearce & Conger, 2003). As noted by Kotter (1996, p. 166), "The hearts and minds of all members of the workforce are needed to cope with...fast-shifting realities..."

Leadership is often categorized in grand terms such as being a visionary, entrepreneur, or risk taker. While these are important leadership components, effective leadership is often a series of small, meaningful and consistent actions toward a shared outcome.

Leadership does not occur in a vacuum. Leadership occurs in a context, in an organizational environment that is comprised of other people, and in a broader cultural and environmental context. This context is dynamic and ever-changing. The effectiveness of a leader will be contingent upon one's leadership abilities, the degree to which the context will allow the leader to exert influence, and the nature of the leadership situation.

It is profoundly important that library and information professionals be effective leaders. The environment demands it. Our users should reap the rewards of effective leadership.

Please join me in reviewing the *Campbell Leadership Descriptor*-an extremely useful tool because of its universality and ease of administration-in developing and strengthening the leadership capacity of our organizational members as we work inside and outside our borders.

Facilitation Guide

The *Campbell Leadership Descriptor* is a self-assessment tool that has been developed by the Center for Creative Leadership from over 30 years of experience in a diverse range of organizational types using studies, personality surveys, training sessions, and standardized lists of leadership competences to arrive at nine core competencies which comprise the Descriptor (Campbell, 2002).

The tool is relatively easy to administer providing the facilitator is well-prepared, and has a solid grounding in leadership theory and practice. It is also helpful if the facilitator has had several years of leadership experience from which to draw to ensure participant questions are well-answered, and to enrich the discussion with contextual material.

Embarking upon the use of the *Campbell Leadership Descriptor* requires preparation, facilitation, and evaluation. Each will be discussed, in detail. This facilitation guide is based upon use of this tool for the Thinking Outside the Borders: Library Leadership in a World Community program. In this program participants came from diverse geographical locations, many whose first language was not English, the host language of this program.

The *Campbell Leadership Descriptor* includes a “Multicultural Awareness” component as one of its nine core leadership competences. This fits well with the Thinking Outside the Borders’ program where cross-border partnerships and collaborations are both encouraged and fostered.

A. Preparation

Preparation is the key to the successful facilitation of the *Campbell Leadership Descriptor*.

Four Weeks Before

Group size: Determine a cap on the number of participants for the session. The tool works well with a variety of group sizes. Remember that a large group will have an impact on time, time to field questions, to complete the assessment tool, and if working with international participants whose first language is not the host language, time to slow one’s delivery and to answer questions.

This facilitation guide has been designed for 30 participants, providing a breakdown of five groups of six people for small group discussion and exercises.

Tip: Prepare by ordering the Campbell Leadership Descriptor Facilitator’s Guide and Participant Workbooks well in advance of the workshop. There are a variety of online sources from which to order. Use Google and insert the phrase “Campbell Leadership Descriptor” in the search box.

Two Weeks Before

Familiarize yourself with the *Campbell Leadership Descriptor*. Each Participant Workbook and Facilitator's Guide will come with a Leadership Descriptor Survey, the self-assessment tool participants will fill out and score. Complete and score the Leadership Descriptor Survey yourself to ensure you are comfortable with the tool.

Tip: Thoroughly learn and practice use of this leadership tool.

In addition to the tips and guidance provided in this publication, review the Facilitator's Guide provided by the *Campbell Leadership Descriptor*. You may wish to use examples, questions and ideas from this source.

Read, review and prepare contextual material on leadership, leadership in a librarian context, and information about the broader global information context to provide background information from which to lead discussions or field questions. The "Introduction/Context" to this facilitation guide provides useful information that you are welcome to use, and there is a "Selected Bibliography on Leadership" in Appendix F.

Tip: Create context for the discussion, providing a compelling reason for participants to want to invest in the learning process of developing their leadership abilities.

One Week Before

Finalize the workshop content including the outline, timing, learning outcomes, format, discussion questions, exercises and handouts. The *Campbell Facilitator's Guide* includes a chapter called "Preparing for a Workshop Session," which includes helpful information.

Tip: PowerPoint slides can be developed using content from the Campbell Leadership Descriptor found at the Pfeiffer Website.

Confirm audio-visual equipment, room set-up and supplies with the workshop organizers (if your session is part of a larger workshop) or arrange for these yourself.

Tip: Arrange tables to facilitate small group discussion.

Unwrap Participant Workbooks from the plastic wrap and remove the Leadership Descriptor Survey (self-assessment tool). This will be distributed after the introduction and instructions are provided to ensure participants do not prematurely start the survey.

Workshop Format and Content:

Length of Session: The workshop can be administered in 2 to 2.5 hours (Campbell, 2002). In my experience, more time is needed, especially when working with a diverse group of participants. Also, feedback from session participants indicates they enjoy and want more time for facilitated discussion.

Two session lengths are suggested: 3 hours and 15 minutes and 4 to 5 hours.

Agenda (3 hours, 15 minutes)

Introduction (agenda, learning outcomes) – 5 minutes

Leadership Context – 10 minutes

Introduce the *Campbell Leadership Descriptor* – 15 minutes

Instructions for Completing the Descriptor – 15 minutes

Participant Completion of Descriptor – 45 minutes

Break¹ – 15 minutes

Large Group Discussion of Descriptor Results – 20 minutes

Small Group Exercise – 40 minutes

Leadership Focuser (action plan) – 25 minutes

Conclusion – 5 minutes

Agenda (4 or 5 hours²)

Day 1

Introduction (agenda, learning outcomes) – 5 minutes

Leadership Context – 10 minutes

Introduce the *Campbell Leadership Descriptor* – 15 minutes

Instructions for Completing the Descriptor – 15 minutes

Participant Completion of Descriptor – 45 minutes

Reflection and Analysis - evening or one hour ³

Day 2

Large Group Discussion of Descriptor Results – 20 minutes

Small Group Exercise – 40 minutes

Leadership Focuser (action plan) – 25 minutes

Conclusion – 5 minutes

Tip: Ensure each segment of the workshop and all necessary information and instructions are imparted within the allotted time. Remember, additional time is needed when working with an international audience.

B. Facilitation

When beginning the workshop, establish a welcoming environment in tone, body language and delivery, encouraging participants to ask questions at any time. Review the agenda and the learning outcomes for the session.

Tip: Speak slowly, announce clearly, avoid colloquialisms, and build in extra time for questions and completing the questionnaire when working with participants whose first language is not the host language.

Here are suggested learning outcomes that participants can expect from this session:

- Knowledge of universal leadership components.
- Identification and importance of characteristics of successful leaders.
- Awareness and understanding of personal strengths and areas in need of improvement.
- Understanding impact of personal leadership strengths and areas in need of improvement.
- Development of personal *Leadership Focuser* (action plan).

Explain to participants that they will be completing the *Campbell Leadership Descriptor*, a self-assessment tool that focuses on essential, universal leadership components for successful leadership. These components are applicable no matter where one lives and works, and for every level in every type of organization.

In filling out the survey, people will learn more about their leadership strengths and areas in need of improvement or leadership challenges.

Tip: Avoid use of the word “weakness.” Use “development” or “area in need of improvement.” Many people have not had the opportunity to develop a leadership skill.

Leadership Context – 10 minutes

Set the context for the discussion of leadership. Suggested content can be found in the “Introduction/Context” of this facilitation guide.

Tip: Be mindful of cultural context and different political structures especially in relation to participants’ perspectives on leadership. Accentuate that leadership resides in all of us irrespective the nature of the organizational structure and climate.

Engage participants in a discussion about the nature of today’s library work environment. Answers are likely to align with the quotation provided in this unit’s “Introduction/Context” by Schein (2004), which can be shared with participants.

Underscore the importance of learning when participants use, reflect upon, and develop an action plan with the *Campbell Leadership Descriptor*. Learning is change. Developing one’s leadership abilities is a process of learning: gaining self-awareness and learning new leadership competencies and behaviors. There is no magic bullet. Leadership development is an intentional and slow process that can be very rewarding to the individual, and to the broader organization.

Introduce the Campbell Leadership Descriptor – 15 minutes

The *Campbell Leadership Descriptor* is comprised of nine leadership components. Each has

a list of five adjectives to describe the characteristics of leaders who are talented in the accomplishments of that component.

Tip: Suggest participants follow along using their Participant Workbook.

The leadership components are divided into two types: Major Tasks and Personal.

Six major tasks of organizational leadership must be present and well-executed within any organization or the organization and its membership will suffer. Leaders either have to do these directly or through delegation (Campbell, 2002). Major Tasks include:

1. Vision – Establish the general tone and direction of the organization.
2. Management – Set specific goals and focus resources on achieving them.
3. Empowerment – Select and develop subordinates⁴ that are committed to the organization's goals.
4. Diplomacy – Forge coalitions with important internal and external constituencies: peers, superiors, subordinates, potential organizational allies, and other important outside decision makers^{5 6}.
5. Feedback – Observe and listen carefully to clients, customers, voters, employees, students, team members and then share the resulting information in a manner that those affected can accept as beneficial⁷.
6. Entrepreneurialism – Find future opportunities, including increased revenues, expanded markets, or a higher probability of desirable outcomes such as international peace, a healthier environment, or the creation of beauty through mechanisms such as new projects, programs, or policies⁸. (Campbell, 2002, p. 7-9)

Tip: Participants may ask about the difference between leadership and management. Emphasize their complementary nature. Indicate that successful organizations need to be effective in both areas. I use Kotter's (2001) explanation that management deals with complexity (planning, organization, budgeting, etc.) Leadership is about change (setting direction, aligning, motivating, empowering, etc.)

There are three Personal Components that are necessary for successful leadership. Leaders must have these components or be able to develop these in themselves. Unlike Major Tasks, Personal Components cannot be delegated. Without these characteristics, a leader will have trouble focusing the attention and activities of organizational members (Campbell, 2002.) Personal Components include:

1. Personal Style – By personal example, set an overall organizational tone of competence, optimism, integrity, and inspiration.
2. Personal Energy – Live a disciplined, wholesome lifestyle that provides the necessary energy and durability to handle the physical demands of leadership: long hours, stressful decisions, conflicts and its resolutions, wearying travel.
3. Multicultural Awareness – Be experienced and comfortable working with individuals and managing organizations across different geographic, demographic, and cultural borders. (Campbell, 2002, p. 10-11)

Instructions for Completing and Scoring the Descriptor – 15 minutes

Self, Good and Poor Leaders

The Campbell Leadership Descriptor asks participants to assign a rating for “Self,” “Good,” and “Poor” leaders. Participants will compare their scores with the scores they assign to their good and poor leaders.

Engage participants in a discussion of good and poor leaders. Ask them to think of someone they know or with whom they have worked who they admire as a good leader, or conversely, who they consider a poor leader.

After this discussion, ask participants to note, using an initial, the good and poor leaders they selected. They will be using these people as their “good” and “poor” leaders when completing the Survey.

Tip: Urge participants to avoid using a composite of a good or poor leader. It must be a person with whom they are familiar.

Provide the instructions for completing and scoring the Survey clearly and concisely.

Participant Completion of Descriptor – 45 minutes

Distribute the *Leadership Descriptor Survey*. Be available to answer any questions participants may have. This is very important when there is a diverse group of participants. Be mindful that people can find the process of scoring confusing. Offer your assistance.

Tip: Suggest participants use a different color marker to score “Self,” “Good,” and “Poor” leader scores. Using symbols is slow and less illustrative.

When everyone has completed the survey, offer some concluding remarks to end this portion of the workshop, remarks that underscore that leadership development starts with self: self awareness through reflection and insight that will lead to development and change.

I encourage participants to fill out the *Results at a Glance* (Appendix A) handout to provide them with an easy, textual compilation of their results. This visual can be posted at their workspace, reminding them of the many leadership strengths they already have, and the areas in which they can develop to increase their leadership capacity.

Provide participants with a 15 minute or lunch break at this juncture.

Reflection and Analysis – evening or 1 hour.

(Note: Go to next section if you are facilitating the three hour session.)

Reflecting is a key strategy to gain insight and knowledge about patterns of behavior, emotions and perceptions to determine their appropriateness in relation to the context or situation at hand (Mavrinac, 2006; Schon, 1987.) Reflection can lead to change, adopting new patterns of behavior (Argyris, 1999.) This is essential in the process of leadership development.

A useful technique to aid in the process of reflection is journaling (Klauser, 2000⁹). Journaling, or recording one's thoughts and feelings on paper, is a means to capture these thoughts and feelings for closer analysis, reflection, insight, and change.

The following journaling exercise can be used to inspire reflection and insight:

- Review your scores for the *Campbell Leadership Survey*.
- Select one strength and one area in need of improvement that you would be comfortable sharing with others.
- Analyze why you believe you have this strength, and, in turn, why this area is in need of improvement.
- How has your strength contributed to your success as a leader? Provide a tangible, work-related example of this.
- How has your area in need of improvement been a barrier or a challenge to you as a leader? Provide a tangible, work-related example of this.

Writing down one's leadership strengths bolsters confidence, and provides tangible examples of the impact of this leadership strength. Writing down areas in need of improvement provides the opportunity to analyze whether one is resisting or avoiding leadership development in this area. For instance, if one scored low on the component, "entrepreneurialism," the process of journaling might reveal a fear about taking risks and a preference for staying within one's comfort zone. Journaling can help us analyze why barriers might be holding us back, assist us in putting these barriers into perspective, and in turn, create an action plan to develop in this area.

Tip: Provide each participant with a small notebook to be used as their personal journal.

Large Group Discussion of Descriptor Results - 20 minutes

Engage participants in a discussion about their experiences and initial insights with the *Campbell Leadership Descriptor*. Here are several discussion questions, some culled from the Facilitator's Guide (Campbell, 2002):

- What are your initial thoughts about the *Descriptor*?
- What was the most important thing you learned as a result of completing the *Descriptor*?
- What surprised you?
- What about your poor leader? Did anything surprise you with their results¹⁰?
- Are there any leadership components that you feel the Campbell instrument does not cover¹¹?
- What do the scores suggest to you about effective leadership?

Tip: Establish ground rules of respect and confidentiality to create an environment that encourages participation and an enriching discussion.

Small Group Exercise – 40 minutes

Those who included the “Reflection and Analysis” component in the workshop will have laid the ground work for this group exercise found in Appendix B. The goal of this exercise is to discuss the implications of leadership using the components of the *Campbell Leadership Descriptor* in real and concrete terms by having participants share their personal experience and impressions of their results. Discussions of leadership development often occur in the abstract. This activity and the preceding “Reflection and Analysis” exercise, focus the discussion of leadership in concrete terms in relation to an individual’s experience and reality.

This exercise works well with tables of five or six people, allowing enough time for individual sharing and group reporting. Facilitate the discussion, underscoring key themes and points of learning.

Tip: Grounding the discussion in concrete terms personalizes the learning experience, an important aspect of adult learning that can contribute to meaningful development and change (Knowles, Holton & Swanson, 1998.)

Leadership Focuser (action plan) – 25 minutes

This exercise translates participant results into concrete terms. *The Leadership Focuser*¹² is an action plan whose purpose is to leverage one’s leadership strengths and strengthen one’s leadership challenges into actions and positive outcomes, committing to a course of action for one year. Appendix C provides the instructions for the *Leadership Focuser* exercise; Appendix D is a sample of a completed *Leadership Focuser* form; and Appendix E is a blank *Leadership Focuser* form.

It is important to slowly walk through the instructions for completing the *Leadership Focuser* action plan. Using separate forms for their strength and their area in need of improvement, participants start with one year ahead, and state a specific desired outcome for both. They then go to the “tomorrow” part of the form and state what they plan to do tomorrow to advance the outcome they identified at one year. Each time period is then filled out, in turn, until the one year mark is reached.

Appendix D provides a sample of a completed form. Review this using PowerPoint slides starting at one year. The leadership component “vision” has been purposely selected because vision is often attributed to seasoned leaders at the top of the organization chart. For new leaders, vision can sometimes feel unattainable or, at best, elusive. By following the example, one can see how “vision” can be broken down into small, meaningful and consistent actions that can result in a large and positive impact for the individual and the organization when all of the actions are accomplished.

*Tip: It is important that participants take their time in filling out this form. Encourage them to start the process at the session, and to complete this as their action plan*¹³.

Summary – 5 minutes

End the session by emphasizing that leadership is not an abstract concept, that it resides in all of us and is a series of small, meaningful and consistent actions toward an intended outcome.

Indicate that you hope participants take away knowledge of the essential, universal leadership components, their knowledge of self in relation to their leadership strengths and areas in need of improvement, and that they leverage both into positive and substantive outcomes. This will contribute to their development as a leader, and will benefit the organization in which they work and its users.

Note that in their handout package, there is a “Selected Bibliography on Leadership” (Appendix F) should they wish to read more about leadership.

Thank participants for their time and energy, and wish them well in their leadership development!

Tip: Provide your contact information and welcome participant questions after the session.

Evaluation

Feedback and evaluation of the workshop are extremely valuable, and help shape future workshops. Shortly after the session ends, note facilitation areas that did not go smoothly, or when participants seemed confused. Also, note areas where participants were engaged and excited, and the questions that they asked. Use a formal evaluation form at the end of the session to obtain structured feedback.

Conclusion

Use of the *Campbell Leadership Descriptor* can be an enjoyable and enriching learning experience for new and experienced leaders. It incorporates multicultural competencies, vital as we increasingly work in diverse organizations, and in a context without borders. Leadership in a very dynamic, rapid changing environment demands leaders be in perpetual learning mode (Schein, 2004). This includes ongoing leadership development for all members of the organization to increase the organization’s capacity for success. Leaders can cultivate an environment for learning. They can develop a reflective workplace that questions assumptions, and asks, “how can we learn from this?” (Mavrinac, 2006) to create an environment that is nimble, and views change (or learning) as natural and normal. Effective leadership begins with self. The *Campbell Leadership Descriptor* is an extremely useful tool to start the process of leadership development through self-awareness, reflection, insight and change, equipping the organization to flourish in an uncertain, yet exciting, environment.

NOTES

- ¹ It works well to time the session to coincide with lunch to provide an ample break.
- ² Ideally this session would occur over two days providing time during the evening of the first day for participants to complete the unit “Reflection and Analysis.” If this cannot be accommodated, an additional hour should be added to the one day session, extending it to 5 hours.
- ³ If the additional hour is added to the one day session, a 15 minute break should be added to the agenda.
- ⁴ I substitute the word “employees” for “subordinates” to underscore the peer-to-peer and shared nature of leadership in particular in relation to project and team work.
- ⁵ I substitute “reporting relationships” for “subordinates.”
- ⁶ Bolman & Deal (1997) include a rich discussion of the “political frame” of leadership that is useful for the component of “Diplomacy.”
- ⁷ Kegan & Lahey’s (2001) *How The Way We Talk Can Change The Way We Work* is an insightful source on providing feedback in a non-threatening, deconstructive manner.
- ⁸ I alter this definition to better reflect the library and information profession: Seek and create opportunities for personal development, or new projects, programs, or policies for the organization and for the community.
- ⁹ Facilitators who include the “Reflection and Analysis” unit in the workshop are advised to review the title *Write It Down, Make It Happen* (Klauser, 2000).
- ¹⁰ Participants are often surprised to see that their “poor” leader has areas of strength.
- ¹¹ Participants enjoy this question, often raising this without prompting. It is important for the facilitator to have a solid grasp of the 9 components and 40 adjectives which comprise the Campbell Leadership Descriptor. Most suggested omissions will fit into the existing components of the Descriptor.
- ¹² Participants find this exercise useful. Feedback from sessions indicated a need to provide a tangible example of a completed form, and the desire to have time to begin completing the form during the session.
- ¹³ The *Participant Workbook* includes another action plan exercise that facilitators may wish to use.

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Results At A Glance - SELF

	STRENGTHS (3-4)	NEEDS IMPROVEMENT (1-2)
VISION	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •
MANAGEMENT	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •
EMPOWERMENT	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •
DIPLOMACY	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •
FEEDBACK	<ul style="list-style-type: none"> • • • • • 	<ul style="list-style-type: none"> • • • • •

Results At A Glance - SELF

	STRENGTHS (3-4)	NEEDS IMPROVEMENT (1-2)
ENTREPRENEURIALISM	<ul style="list-style-type: none">•••••	<ul style="list-style-type: none">•••••
PERSONAL STYLE	<ul style="list-style-type: none">•••••	<ul style="list-style-type: none">•••••
PERSONAL ENERGY	<ul style="list-style-type: none">•••••	<ul style="list-style-type: none">•••••
MULTICULTURAL AWARENESS	<ul style="list-style-type: none">•••••	<ul style="list-style-type: none">•••••

Mary Ann Mavrinac, University of Toronto Mississauga, Nov 06

Small Group Exercise***Goal***

To discuss the implications of leadership using the components of the Campbell Leadership Descriptor in real and concrete terms

Exercise

Using a component from the Campbell Leadership Descriptor, each participant will share:

- The impact (implications and outcome) for you as an individual or for your organization because of the strength or challenge you have with this leadership component in a particular situation or initiative. Examples can be those resulting in a positive or negative outcome.
- Discuss the impact in real, concrete terms.
- State what you have learned about leadership from this example.

Decide upon one example to report to the whole.

Time period for reporting: 5 minutes per group.

Leadership Focuser***Goal***

- To derive benefit and growth for yourself and for your organization.

Outcomes

- Leverage your leadership strengths into actions and positive outcomes.
- Strengthen your leadership challenges and areas in need of improvement through actions and positive outcomes.
- Commit to outcomes through tangible actions starting tomorrow, and then through to one year.

Exercise

- Review leadership strengths and areas in need of improvement using Results at a Glance.
- Select one strength and one area in need of improvement you wish to leverage and develop into tangible outcomes.

(Note: One of these must be from the Personal Style, Personal Energy or Multicultural Awareness components of the Campbell Leadership Descriptor.)

- Start with one year ahead. State specific desired outcomes for your strength and your area in need of improvement.
- Go to “Tomorrow.” State what you will do tomorrow to advance the outcomes you identified at one year.
- Continue with one week, then, one month, then three months, then six months.

Leadership Focuser Example

Date: _____

1 Year		6 Months	
	Implement a visionary project that is in alignment with our organization's direction.		Identify resource needs.
			Be resourceful in identifying internal and external sources of funding.
			Develop a detailed project proposal.
			Identify and invite project participants.
			Delegate roles, and specify time lines and outcomes.
			Incorporate ongoing mechanism of feedback from mentor, supervisor and project participants.
			In next six months, complete all tasks to project completion.

3 Months		1 Month	
	Read intensively on my topic.		Decide on 1 broad area of interest I will investigate to create a project for our organization that is farsighted.
	Narrow my focus to a specific area of analysis.		Develop a plan of action.
	Complete an environmental scan of my topic.		Meet with my supervisor to discuss my goal, and the process I will use, asking for support and feedback.
	Develop a broad project proposal that looks ahead 2-3 years.		Develop a current awareness profile for my topic.
	Discuss project proposal with my mentor and my supervisor. Incorporate their feedback.		Discuss my plan of action with my mentor, asking for feedback.
	Obtain approval from my supervisor to fully develop the project proposal.		

1 Week		Tomorrow	
	Write down 3 broad areas of interest that are in alignment with our organization's direction.		Decide on the leadership adjectives of "vision" that I wish to develop in myself.
	Identify leaders that I know who are strong in the "vision" component of leadership.		Write these down, expanding upon the meaning of each.
	Define mentoring goals for developing "vision," and a time line for each.		Write down why vision and the specific adjectives of vision are important for my development.
	Contact a leader to ask if they would be my mentor.		
	Book a meeting for next month with my direct supervisor to discuss my ideas for leadership development.		

*Form adapted from Lifetime Focuser Quinton Group Inc.®
 Mary Ann Mavrinac, University of Toronto Mississauga, January 2008
 maryann.mavrinac@utoronto.ca

Leadership Focuser

Date: _____

1 Year	

6 Months	

3 Months	

1 Month	

1 Week	

Tomorrow	

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1 This title includes chapters on leadership and diversity (Alire) and leadership from an international perspective (Li).



“...as a leader you can never say thank you enough, but even more important is the idea of serving the people you are leading. Being a leader can be a very humbling experience.”

Leadership Qualities for Future Library Leaders:

Carol's 10 Steps to Being a Great Library Leader

Carol A. Brey-Casiano

Director of Libraries, El Paso Public Library

It was a real pleasure for me to speak at two of the Thinking Outside the Borders institutes in Allerton Park, Illinois and Phoenix, Arizona. It was good to re-visit the University of Illinois where I received my master's degree in 1980. Some of us thought that Allerton Park was a bit rustic, but by today's standards so was everything else about my college education in 1979—I typed my papers on an electric typewriter, spent hours reading journal articles on microfilm, and the only library records I could access via computer were less than one year old—part of the University of Illinois' brand new online computer project. Perhaps surprising given my later involvement with the American Library Association (ALA) and others, I was not a member of any professional organization, although I was invited to join Beta Phi Mu.

I got my first job less than three months after graduation—and began serving as the Bookmobile Librarian for the Ozark Regional Library in southern Missouri. I drove that bookmobile over the country roads of a rural, four-county area, where the largest town had a population of 5,000 people! All I really wanted at that time was satisfying work—in fact, studies have shown that's what most of us want. I never really thought about being a leader in this field, nor did I come close to dreaming of being ALA President—or president of any other organization for that matter. I was fortunate to have some wonderful mentors along the way who helped me to hone what leadership skills I did have, and develop new skills to meet the challenges that always come when you make the decision to step out of your comfort zone.

As I think about the great mentors I have had over the years, I realize that some of them are nearing retirement, and some are no longer with us. The fact is, our profession is aging, although the promise of retirement looming on the horizon is certainly something I am looking forward to! The challenge for us Baby Boomers who might be retiring within the next

10-15 years will be the recruitment of our successors. Not only do we need to recruit librarians, we need to recruit leaders to our profession!

In a recent paper entitled “Library Retirements—What We Can Expect” by Denise Davis, Director of the ALA Office for Research and Statistics, Ms. Davis finds that estimated retirements from our field are already outpacing Library and Information Studies graduations in the U.S. today, even with the reduced number of jobs in public and academic libraries. She also estimates that we will not see a surplus of graduates to retirements until the year 2019, and that it may take until 2023 before we recover the loss due to all the estimated retirements. And, Ms. Davis notes, “the issue is not [just] having LIS graduates in the marketplace, the issue becomes having qualified librarians to promote into the positions vacated due to retirement.”

The Armijo Branch of the El Paso Public Library is located within walking distance of the U.S./Mexico border, in the area of South El Paso known as the Segundo Barrio or Second Ward. According to the 2000 Census, 95.5% of the population in this neighborhood is Hispanic/Latino and 87.7% of the population speaks a language other than English at home. There is no doubt that El Paso is an international city...it is obvious as soon as one steps outside.

I am already seeing a shortage of qualified librarians available to take front-line and mid-level management jobs in my own library, the El Paso Public Library in Texas. “What do I mean by qualified?” While there are the usual minimum requirements for most of these positions, how many years of experience you have is not nearly as important to me as the leadership qualities you exhibit. I discovered, deep down inside my young library soul some twenty-five years ago, that I had the passion to be a library leader. But it took some great mentors, a variety of experiences, and some real challenges along the way before I could truly say that I had come close to becoming the leader I wanted to be.

We need real leaders if our libraries of the future are to thrive and grow. I know that you must possess the passion, the enthusiasm it takes to be a leader or you

would not be at this Institute, but now the question is: how do we develop the seasoned leaders we will need to move this profession well into the 21st century? In thinking about this, I have developed “Carol’s ten steps to being a great library leader,” which I will share with you now in the hopes that it will be of some help as we think about succession planning for the future.

Step #1: Find a good mentor/ BE a good mentor

Ralph Waldo Emerson once wrote “Our chief want is someone who will inspire us to be what we know we could be.” For me, Marilyn Hinshaw was that person. She was the one who hired me for my first Library Director’s job at the Muskogee (Oklahoma) Public Library when I was just 24 years old. Marilyn saw something in me that I didn’t recognize myself. As my boss and mentor, she gave me advice, but also encouraged me to develop my own management style. She also sent me to my first ALA Conference, staying home so that I could attend, in 1983. Marilyn always seemed to believe that I could do more than I believed of myself. I remember when she called me in 1988 or so to ask me to chair the Program Committee for what was then called the Small and Medium-Sized Roundtable of ALA, which she was chairing that year. “The Committee Chair resigned and I need someone who can get the job done—fast,” she told me. I, of course, said yes!

My relationship with Marilyn proves that a good mentoring relationship never grows old. I still receive encouraging e-mails from her about recently posted library director's jobs... "Now Carol, this is one you really should consider!" she'll say. And, I, in turn, have reached out to people who need mentors, in my Association work in and my home library.

Step #2: Learn how to follow first

It's been said that "You cannot be a leader, and ask other people to follow you, unless you know how to follow, too." No matter what leadership position you hold, there is probably still someone you have to report to. When I became President of ALA, I found it fairly easy to get some of the things accomplished that I wanted, but there were also many things that the ALA Staff and membership expected of me! Sometimes, I had to know how to follow the lead of others if I was to succeed.

Step #3: Be Visionary

I have always believed that the mark of a good leader is one who can articulate a vision for his or her organization and then motivate others to share and accomplish that vision.

The "America's Most Literate Cities 2007" study conducted by Dr. Jack Miller of Central Connecticut State University has ranked the City of El Paso second to last among literate cities with a population of 250,000 or more for the past several years. Libraries in El Paso, however, have risen several notches in the study to 59 out of 69 cities, demonstrating that libraries can make a difference! This change in the status of libraries can be attributed to the construction of three new branches and an expanded Main Library by the El Paso Public Library System.

The El Paso Public Library serves a community that has been ranked last or close to last in literacy among major U.S. cities. Yet, recently our City Council set a goal for our library to become "among the best in the nation." I guess I was one step ahead of them, because I had already told our staff we should strive to be the best in the world! Even though our funding levels are low for a community our size, the quality of our staff, facilities and programming has helped us to establish benchmarks that will enable us to achieve a higher stature in the years to come—and achieve our goal of being "among the best libraries in the nation."

Peter Drucker described it this way: "Leadership is not magnetic personality, that can just as well be a glib tongue. It is not 'making friends and influencing people,' that is flattery. Leadership is lifting a person's vision to higher sights, the raising of a person's performance to a higher standard, the building of a personality beyond its normal limitations."

Step #4: Be a Good Servant

In his book *Leadership Is an Art*, Max DePree states "The first responsibility of a leader is to define reality. The last is to say thank you. In between, the leader is a servant." I read that book about 15 years ago, but I've never forgotten DePree's words. Of course, as a leader you can never say thank you enough, but even more important is the idea of serving the people you are leading. Being a leader can be a very humbling experience. You learn that, while the buck may stop with you, it takes the work of every team member to be successful.

Lao-tsu said that "As for the best leaders, the people do not notice their existence.... When the best leader's work is done the people say, 'We did it ourselves!'"

Step #5: Take risks

As a leader, I have always subscribed to the old adage “It is easier to ask forgiveness than permission.” And, if the risk I am taking is well-calculated, I usually can give an acceptable explanation even if I do have to ask permission! This is an especially important adage for those of us in government work—whether it is on the local, state or national level. Most of us have probably learned by now that if you ask for permission to do something at the government level, you will involve a team of lawyers for at least a month and by the time you get your answer, it may be too late to move forward.

Step #6: Take care of yourself

Whenever I hear of a friend or colleague who is taking on a new leadership position, the first thing I do is encourage that person to start an exercise program as part of a healthy lifestyle. Being a leader takes stamina. I’m sure most of you know something about the need for stamina. Dee Hock, Founder and CEO Emeritus of Visa, takes this idea a step further by saying that “If you seek to lead, invest at least 50% of your time in leading yourself—your own purpose, ethics, principles, motivation, conduct.” I am always amazed by how much the people I lead pay attention to what I do—the good, the bad, and the ugly. I am a role model, whether I like it or not, and need to remember that at all times.

Step #7: Maintain a positive attitude

While serving as Director of the Oak Park Public Library in Illinois, I was once named the “Perky Librarian” by members of the Library staff. At first I thought people might not take me seriously if I was too positive all the time, but I have learned that, when you are out in front, the people you lead appreciate a positive attitude—particularly when times are tough. Napoleon Bonaparte once said that “A leader is a dealer in hope.” That was particularly true in his case, but I think still remains true today.

Step #8: Never turn down a leadership position...even if it means managing your kid’s soccer team.

You will always learn something new about working effectively with other people. People are always asking me how to get appointed to an ALA Committee. And my answer is—be willing to serve on a committee that isn’t one of the top five in popularity. The first ALA Committee I ever chaired was one called the “Policy Monitoring Committee.” Sounds exciting, doesn’t it?! However, by serving on this Committee I learned a great deal about the inner workings of ALA, which served me well later as I took on more leadership positions.

Step #9: Learn how to motivate people effectively

I think I am still learning how to do this step correctly. There are so many ways to motivate people, and yet it is easy sometimes just to say, “Never mind, I’ll do it myself.” George S. Patton once said, “Don’t tell people how to do things, tell them what to do and let them surprise you with their results.” Or, as Dwight D. Eisenhower put it, “You do not lead by hitting people over the head — that’s assault, not leadership.” This is probably the greatest challenge for me—I love the process, and it is so tempting for me to get involved in many aspects of the day-to-day operation. But any truly great leader has to trust the people she is leading to do their best. And they will not let you down. “The task of leadership is not to put greatness into people, but to elicit it, for the greatness is there already.” — John Buchan once said.

And last but not least...Step #10: Keep your sense of humor!

I try to keep things around my office that make me laugh. These come in handy, particularly whenever I am tempted to take myself too seriously. I once made an especially difficult budget presentation to my staff holding an inflated pink flamingo! Or, if I am working on a tough project, I might put on a funny hat just to keep things in perspective. I am positive the ability to laugh will reduce the stress in your life, lower your blood pressure, and in general make you feel better.

Let me close with this simple thought: Great leaders are the ones who care about the people around them. I feel blessed to work in this field—and I love my job—although I tell people that some days I love it more than others! As librarians, we have the opportunity to shape the future of our profession, one life at a time. These words written by Admiral James B. Stockdale sum it up nicely: “Leadership must be based on goodwill. Goodwill does not mean posturing and, least of all, pandering to the mob. It means obvious and wholehearted commitment to helping followers. What we need for leaders are men of the heart who are so helpful that they, in effect, do away with the need of their jobs. But leaders like that are never out of a job, never out of followers. Strange as it sounds, great leaders gain authority by giving it away.”

I encourage you to write these words on your hearts, go out there and change the future of libraries forever! You can do it, or as we say in El Paso, *Sí, se puede!* Thank you.



“Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. It is important to acknowledge and understand different organizational cultures, to respect them, and to find ways that these realities can contribute to and strengthen the mutual endeavor.”

What Does it Mean to Lead in the International Library World?

Ujala Satgoor

*Deputy Director, Special Units Library Services,
University of Pretoria*

If you want to go fast, go alone. If you want to go far, go together!

African proverb

Introduction

My foray into international library leadership began in 2001 with the South African Library Leadership Project (SALLP), which was a partnership project between the Library and Information Association of South Africa (LIASA) and the Mortenson Center for International Library Programs at the University of Illinois, Urbana-Champaign. This groundbreaking 3-year project was made possible by a grant of \$249,000 from the Andrew Mellon Foundation. It succeeded in bringing together organizations and individuals on the basis of a national need and a common goal, namely to address the development of leadership skills of senior and middle managers of library services in South Africa.

LIASA at this time was still a relatively young library association, as it was constituted in 1997 after a lengthy process of discussions and negotiations among the former racially segregated library associations and organizations. The library and information services (LIS) sector was also a sector that had felt the impact of apartheid. Separate services and facilities, training of librarians, management and leadership based on race, are factors that impacted upon a sector that had a 150 year legacy and fairly sophisticated national infrastructure. Post-1994, which was the watershed year for South African democracy, saw the sudden urgency for transformation and implementation of employment equity, especially at management levels, within all sectors. The LIS sector also felt the reverberations of this transformation force—librarians were appointed to leadership and management positions for which they were ill-equipped. This gave rise to frustrations, tensions in the workplace and a mindset that created a barrier to service delivery.

For the LIS sector, the South African Library Leadership

Project presented itself at the right time and was located in the right organization, LIASA. During the period 2001-2004, 23 senior and middle managers of public and academic library services were selected through an open, merit process for participation in a six to eight week leadership training program at the Mortenson Center. They now constitute a national resource pool of LIS professionals who are making a noticeable impact upon LIASA and the profession.

What emerged during these four years was a strong partnership not only between two organizations, but also between the individuals who lead the project in both countries. This proverb therefore effectively encapsulates the essence of what it has meant to work within the arena of international library leadership, based predominantly on partnerships.

This paper serves as an acknowledgement of my colleagues Barbara Ford and especially Susan Schnuer, with whom I worked from the very outset of the SALLP project. Susan and I subsequently jointly developed and presented a paper entitled “International Partnership, National Impact: The South African Library Leadership Project” at the 6th World Conference on Continuing Professional Development & Workplace Learning for Library and Information Professionals held in Oslo, Norway in August 2005. This paper will highlight aspects of the Oslo paper, and will pay particular focus on the elements of a successful partnership, which inadvertently leads one toward professional leadership.

Individual Leadership

During the course of my involvement with the SALLP, my engagement with external partners, LIASA leadership, South African stakeholders, and the participants themselves gave me the opportunity to identify those qualities and characteristics that are essential for individuals within a successful and effective partnership. It is also based on the observation of how people behave within familiar and new environments. Individual leadership certainly evolves itself based on the inclusion of these qualities and characteristics:

1. **Vision** – Today most organizations and institutions base themselves on a vision, mission, goals and strategies. So, too, should an individual have a vision of where s/he is heading as a professional! It enables one to engage in work that derives both job satisfaction and job security.
2. **Understanding the sector** – It is not only about doing one’s job but also about growing within a chosen profession. Keeping abreast with current trends and developments enables one to know and understand the sector within which one works.
3. **Values** – Personal values define who you are as an individual and permeate one’s conduct and environment. Within the context of a partnership, some of the core values are accountability, discipline, respect, professionalism, initiative and integrity.
4. **Passion** – The emotional and intellectual enthusiasm for what you do or believe in.
5. **Interpersonal skills** – The ability to communicate effectively with individuals and to manage a range of relationships simultaneously and effectively.
6. **Access to resources** – This refers very much to access to technology, information, facilities, etc.
7. **Willingness to learn/to share** – This is an ability to acknowledge the importance of lifelong learning, irrespective of one’s position. Individual leadership is enhanced by the ability to transfer one’s knowledge and skills to others.
8. **Personal commitment** – The ability to commit to the full term of a task or project is an indicator of emotional and professional maturity.

9. **Recognition of your and others' roles** – This is an acknowledgement of the strengths, responsibilities and capabilities of others within a team.

An individual embracing these qualities and characteristics becomes a proactive and strong participant within a partnership or team.

Team Leadership

The initial stages of the project threw up many barriers such as geographical distance, language, “developed vs. developing” issues, resources, management styles, professional mindsets and attitudes. It was certainly a challenge with both partners based on two continents! However, the synchronicity of thought and common purpose were recognised very early in the project and this prevented these barriers from becoming entrenched. During the course of the project, as we began sharing certain elements and took individual responsibility of others, what emerged were distinctive team leadership qualities and characteristics, which also reflected positively on the personalities of the individuals involved. It became a synergy between the individual and team!

The team leadership qualities and characteristics that emerged were:

- Recognition and acknowledgement of differences/needs
- Shared vision
- Mutual respect, understanding & trust
- Ability to compromise
- Members share a stake in both process & outcome
- Multiple layers of participation
- Flexibility
- Clear roles & policy guidelines
- Adaptability
- Open and frequent communication
- Informal relationships & communication links

Successful partnerships occur when partners are recognised as leaders in the field. This happens when there is a proven record of accomplishment, success, delivery or expertise. The SALLP proved itself a success, it delivered on its expectations, the expertise of the partners varied but effectively meshed, and the accomplishments of the participants thereafter endorsed the relevance of the project.

Elements of a successful partnership

Library leadership has become a more focused area of professional development. Several national and international initiatives have emerged. Results have varied from success to failure. It is therefore important to share those elements that foster success but which could contribute to failure if misinterpreted or mishandled. These elements are:

Environment

- History of collaboration or cooperation in the community
- Collaborative group seen as legitimate leader in the community
- Favorable political and social climate

Membership

- Mutual respect, understanding & trust
- Appropriate cross-section of members
- Members see collaboration in their self-interest
- Ability to compromise

Process & Structure

- Members share a stake in both process & outcome
- Multiple layers of participation
- Flexibility
- Clear roles & policy guidelines
- Adaptability
- Appropriate pace of development

Communication

- Open and frequent communication
- Informal relationships & communication links

Purpose

- Concrete, attainable goals & objectives
- Shared vision
- Unique purpose

Elements - Resources

- Sufficient funds, staff, materials & time
- Skilled leadership

In addition to the above, the additional lessons learned from the SALLP for successful partnerships are:

- ***Mutual respect for cultural differences and an understanding of local conditions and needs.***
Every organization has its own culture that is built over time, based on its mission, its practices, its people, its governing values, its traditions, and its institutional history. It is important to acknowledge and understand different organizational cultures, to respect them, and to find ways that these realities can contribute to and strengthen the mutual endeavor.
- ***A willingness to learn and operate in a different environment.***
This includes the acknowledgement of local expertise and consultation with a wide range of individuals and/or groups who live in and intimately know local conditions. The most successful partnerships recognize and value their differences and find ways to integrate them into a workable overarching partnership culture.
- ***Breaking down obstacles.***
Major obstacles to a constructive and successful partnership include:
 - conflict over key interests;
 - a lack of clear purpose;
 - unrealistic goals or deadlines;
 - key interests and stakeholders, including decision makers, that are not included or refuse to participate;

- unequal benefits for the partners;
 - some participants with more power than others;
 - financial and time commitments that outweigh potential benefits;
 - partnership members who are uncomfortable with the commitments required;
 - constitutional issues or legal precedents which constrain the partnership.
- The ability to identify areas of potential conflict at the outset of a project and the sensitive handling of obstacles when and if these do arise, are essential skills that help to prevent the dissolution of a potentially effective partnership.
 - ***Celebrating success.***
Successful partnerships look for every opportunity to celebrate individual project successes or key benchmarks in the evolution of the partnership. Such celebrations allow the partners to recognize good work being done that reinforces the goals of the partnership; to gain some outside recognition of the partnership; and/or to demonstrate possibilities for the partnership to grow. Recognizing and celebrating accomplishments helps motivate and spur people on to new challenges. It is a lost opportunity when it does not occur. If one's goal is to build greater awareness of the partnership, then the partners need to take every opportunity to celebrate each other's success.

Conclusion

Successful partnerships develop over time and have the potential to become long-term relationships. Based on the limited resources of individual institutions, partnerships are emerging as the favoured route for further development. I recommend that to become a leader in the field, one should learn from others, share with others and embrace those elements that promote success, mutual professional respect and growth. You will then certainly travel far together!



“Understanding where and how one can lead is something arrived at through personal choice, practice, feedback and the development of

- ***Self-awareness***
- ***Effective communication***
- ***Understanding the role of assumptions***
- ***One's leadership skills and abilities”***

Intentional Leadership and Interpersonal Effectiveness

*Kathryn J. Deiss, Content Strategist
Association of College and Research Libraries*

Introduction to this Workshop Aid

This two-part training lesson or workshop focuses on the concepts of choosing to be an intentional leader and the importance of effective communication and interpersonal skills in that leadership.

Part One focuses on participants' personal and intentional leadership. Part Two describes two fundamental models in the area of effective interpersonal communication.

Three models will be used in this workshop. It is important for the trainer to become very familiar with these models and the theories that underlie them so as to be able to both explain and use the models for the deepest possible participant learning experience.

The three models we will use are:

- Intentional Leadership Model (King and Lee)
- Johari Window (Joe Luft and Harry Ingham)
- Ladder of Inference (Chris Argyris)

These are included in the segments of the workshop to which they relate.

Time Needed: 2.5 hours - 3 hours depending on exercises used

Equipment/Supplies Needed: A pad of paper on an easel (flipchart), a whiteboard with markers, or a blackboard. It is important to have a space that is shared and visible to all on which to write. No further technology is needed.

Setting the Stage for Your Workshop

Begin your lesson by stating the *objectives* you hope to achieve with the group. I use the following objectives:

After this training experience, participants will:

- Understand the sources of leadership and be able to reflect on their own leadership.

- Learn the concept of intentional leadership.
- Become more aware of their own communications with others and how that affects their leadership.
- Learn two models for understanding communication and interpersonal effectiveness.

Setting group guidelines at the beginning of your workshop can help create a good environment for participation. Some guidelines I like to use are:

- *Help everyone to participate and learn.*
- *Don't interrupt others.*
- *Ask for clarification when needed.*
- *Be open to new ideas.*
- *Have fun!*

You can allow participants to add a guideline or two to your list if you wish.

It is useful for participants to understand why they should think and learn about leadership and how they can reflect on their own leadership. You as a trainer should place this lesson in the context that makes the most sense for your audience. You can include information in your introduction that draws from the current environment of the libraries your participants are coming from.

Begin with a short discussion about why libraries need excellent leadership now more than ever.

One interactive way to do this is to conduct what is called a *community census*. A community census is a quick

open answering of a sentence that you begin. The “stem sentence” can be something like:

“Excellent leadership is needed because...” This stem sentence is written on the flipchart or whiteboard.

As a trainer you can encourage the participants to call out their ideas to complete this sentence. You should write them on a large paper pad (flipchart) on an easel, a whiteboard, or a blackboard. This gathering of ideas about the need for leadership excellence will help you understand how the group is thinking about leadership and also will help relax them and you. In addition you will use this starting exercise to move into the content of your lesson.

In my workshops, some of the reasons for why excellent leadership is needed now more than ever are such things as: the complexity of the environment within which all libraries exist; new tools, new technologies; different and increasing expectations; changing behaviors of all stakeholders (students, the public, faculty, boards, vendors, and governing bodies).

PART ONE: Intentional and Personal Leadership

Lecturette – a lecturette is a short lecture that the trainer gives which provides some theory and concepts that are fundamental to the workshop objectives.

Begin lecturette:

How can an aspiring leader create a plan to be a “superb leader?” This workshop focuses on several key skills required for excellence in leadership at any level:

- Self-awareness
- Effective communication
- Understanding the role of assumptions in communication
- Personal commitment to choosing and developing one's leadership skills and abilities

There are personal costs to leadership: the time one must invest, the personal sacrifices one must make, the significant challenges one must meet and manage when one is in a leadership role. It is for these reasons that becoming a leader through a conscious and self-aware process of reflection and choice is preferable to leadership by drift.

Leadership by drift occurs when people assume leadership roles without much self-reflection or actual choice. Authentic and strong leaders are choosing this path purposely. And they focus on developing their skills. Interpersonal communication is one of the most important leadership skills that all leaders need to develop.

Leadership occurs at all levels of any effective organization. Everyone in the organization can and should lead. Understanding where and how one can lead is something arrived at through personal choice, practice, feedback, and the development of the skills listed above.

But, how are leaders made, where do leaders come from? King and Lee¹ point to a variety of concepts regarding how leaders are made:

1. Leaders are born (the genetic view)
2. Leaders learn to become leaders (the learned view)
3. Leaders are courageous and heroic (the heroic view)
4. Leaders are those people at the top (the top-only view)
5. Leaders emerge when the situation demands leadership (the social script view)
6. Leaders are those people with the titles (the position view)
7. Leaders are called to be leaders (the calling view)

In reality, many of these factors combine to create leaders depending on the leader and the situation. King and Lee describe the importance of understanding both the costs and the benefits of taking a leadership role. Assuming people have this understanding they can choose leadership “intentionally.”

Sara King and Robert Lee of the Center for Creative Leadership created a model that provides a framework for examining one's own intentional leadership. We will review this model in this module as well as the interpersonal skills that allow for the effective use of your leadership.

End Lecturette

Tip: Always check in with your participants to see if they understand what you are saying or have any questions. You should scan the group visually for cues that they may not understand you or might have a question.

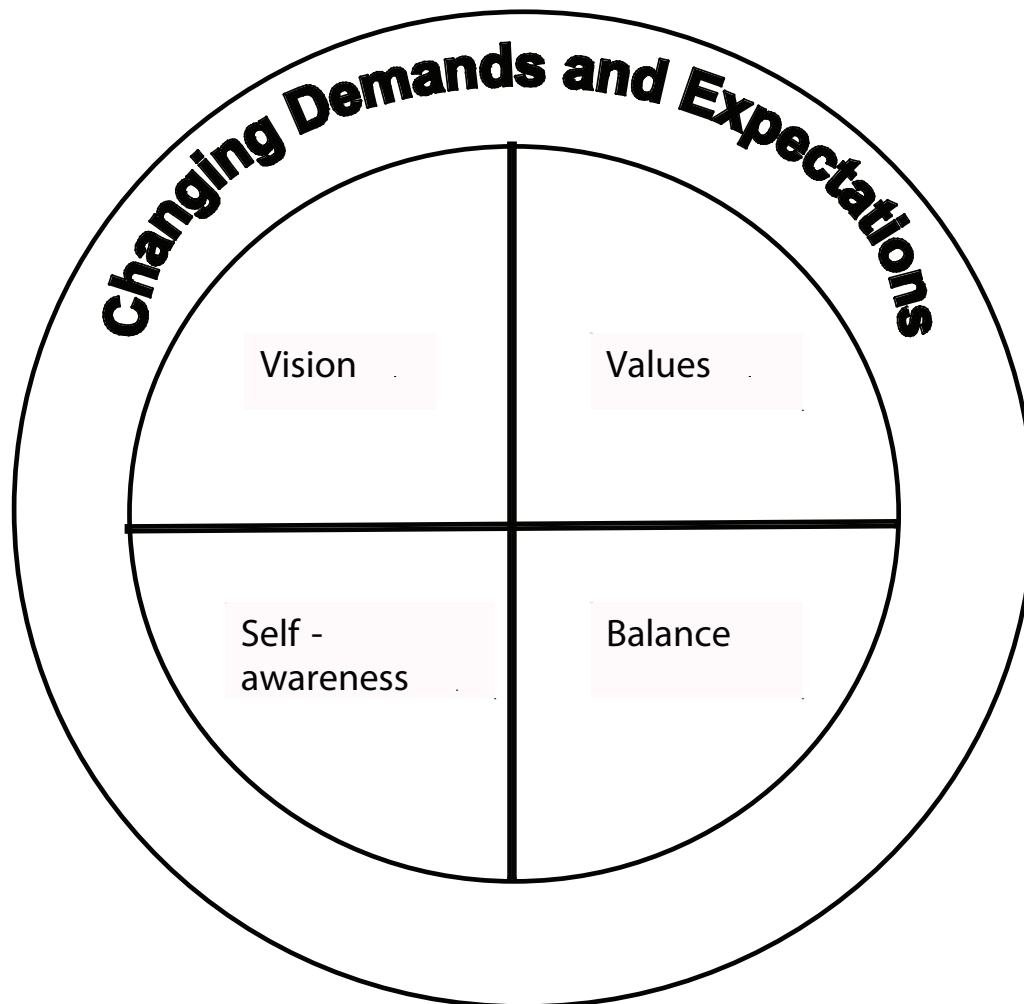
Group Work Options for You as Workshop Leader

After presenting the initial lecturette you can have an open discussion of the seven sources of leaders; ask the group what their thoughts are about those sources. People will have very strong opinions. Your role as a workshop facilitator is not to convince them of any particular source but to help them discuss all of the sources.

Ask how situations might change what kind of leader people will look for.

Present First Model: Personal Leadership Framework – have this model drawn on the flipchart or whiteboard so all can see it and focus on it as you describe it.

Personal Leadership Framework



Source: Lee, Robert J. and Sara N. King. *Discovering the Leader in You*. San Francisco, CA: Jossey-Bass (2000) and The Center for Creative Leadership.

- Discuss the outer ring first: changing demands and expectations. The environment within which leaders act is continually changing and new demands are placed on them as leaders. Some examples in the world of libraries are: changes in how we influence our vendors; changes in copyright; changes in technologies; changes in the larger arena of publishing and information – all of these are changes every library leader has to grapple with and come to an understanding about in order to lead. It is not only in the professionally functional areas that demands change, however. For instance, the expectations of employees have changed over time making it more important to be able to communicate with that group.
- Discuss the inner four quadrants. These are the four core elements of effective and purposeful leaders, according to King and Lee.
- Begin with Vision and the critical nature of having a personal vision for one's own leadership as well as for one's organization/workplace.
- Values are the next quadrant. A clear sense of one's own values are important to leadership in that the most difficult decisions one makes are made on the basis of values. Tell participants that there are values clarification exercises (the King and Lee book contains one such exercise) as they may not know what is meant by a clear sense of personal values.
- The lower left hand quadrant is Self-Awareness. Leaders who fail often fail due to a significant lack of self-awareness. Leaders who succeed are aided greatly by a high degree of self-awareness. This self-awareness is a result of both self-reflection and of feedback from others.
- The last quadrant is Balance. In the Center for Creative Leadership's studies of leadership derailment life/work imbalance was found to be a critical factor. It is very important for leaders to have balance in their lives – understanding how different this balance may be for each individual. It is important because of the demands on the leader's energy; physical, mental, spiritual, and emotional energies are called upon. Balance helps leaders think clearly, make calm decisions, and communicate with confidence and compassion.

Here are two potential exercises. The first one is optional but can set the stage. Depending on how much time you have and what your purpose is with the group you can choose to use either of these exercises or both of them.

Participant Exercise 1:

First silently (approx 5 mins) and then as a group (approx 15-20 mins) identify and discuss the changing demands and expectations that you have experienced as a leader.

Debrief exercise by leading a guided discussion. Ask people to offer some of the things they came up with. Ask the group what their reactions are to changing demands – what is the effect on them? How do they manage to stay balanced when expectations change?

Participant Exercise 2:

Individually write down things you are sure of in your own leadership for each of the quadrants (15-20 mins).

Ask participants to pair up or form triads (groups of three) to discuss which quadrant they feel most comfortable with and which they feel they need to do some more work in (10-15 mins). Emphasize that individuals do not need to share anything they do not wish to share.

Optional instruction for groups of two (dyads) or three (triads): Create some strategies for improving in each of the quadrants (10 mins).

PART TWO – Interpersonal Skills/Communication

You may again begin this segment of the workshop with a community census. The stem sentence you write on the flipchart or whiteboard could be:

“Good communication happens when...”

Encourage the group to offer their ideas and write them on the board. This helps you make connections among things and after your lecturette and exercises you can always come back to this initial community census to validate the ideas of the participants by showing them how what they thought in the beginning actually is important.

This training segment focuses on effective interpersonal communication. Connections can be made to the Intentional Leadership segment by pointing out that the self-awareness quadrant of the King and Lee model is fundamental to effective interpersonal communication.

Lecturette

Many competencies are needed to practice leadership that helps organizations, the people in them, and the clients of that organization. Among these competencies are:

- Influence
- Self-awareness (as seen in the Personal Leadership Framework above)
- Building trust
- Establishing and fostering relationships
- Effective communication

Communication is something we do from the moment we are born until the day we die and yet is the one thing we humans have some trouble with and we are always striving to improve our communication. Good communication is an obvious good in any organization. However, good communication is difficult to achieve due to the complex dynamics of groups as well as the actual necessary communication skills needed for effective communication.

Communication is the process by which we are understood by one another. We convey what we need and want through communication and we understand the needs and wants of others through communication. Interpersonal skills contribute to group synergy. Synergy is

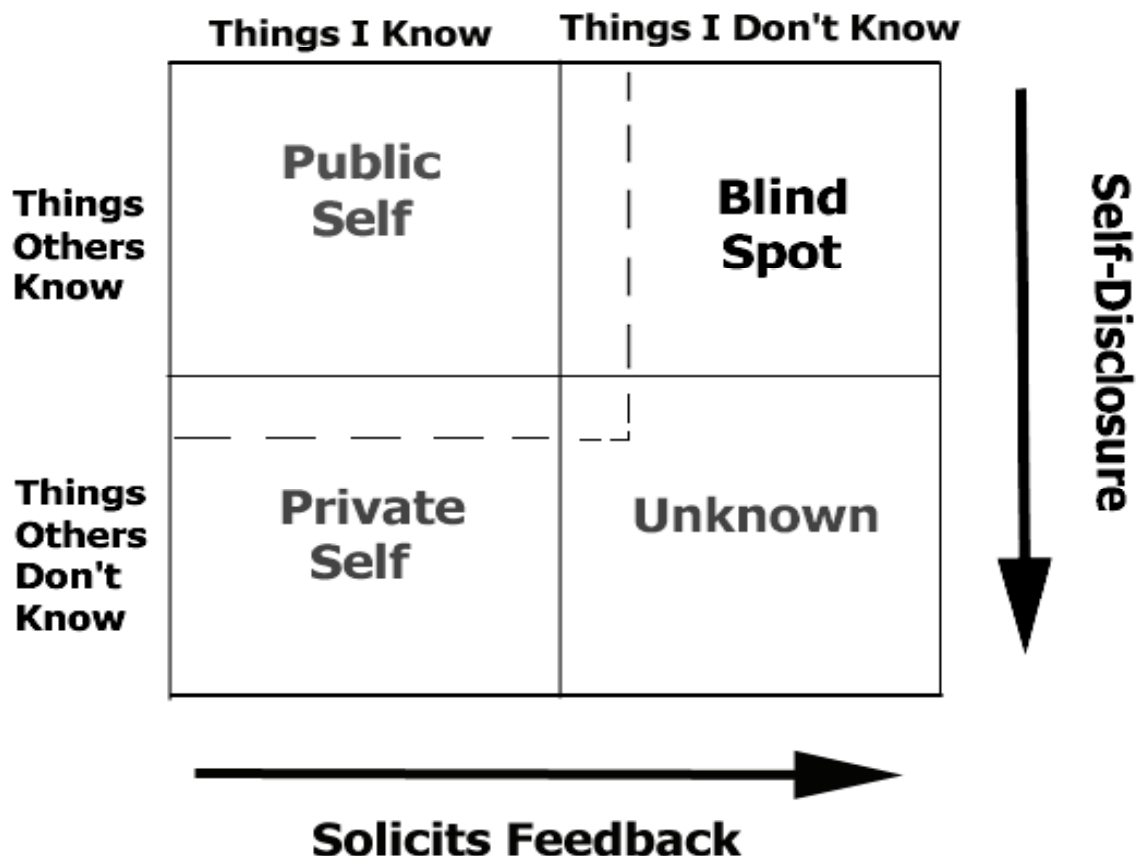
when the knowledge and skills of each individual combine to create something better than any one individual could have produced on his or her own.

Some interpersonal skills are:

- Active listening
- Respectful dissent
- Effective conflict resolution
- Testing assumptions
- Focusing on interests not on positions one wishes to take

In order to better understand the dynamics of interpersonal relationships we will look at a model that will help us better understand this important area. Through this model we will be able to determine how we can become more interpersonally effective in our work relationships.

Present Second Model: The Johari Window



JOHARI WINDOW

Source: The Johari Window form *Group Processes: An Introduction to Group Dynamics* by Joseph Luft by permission of Mayfield Publishing Company. Copyright © 1984, 1970, and 1963 by Joseph Luft.

This model was created by two social scientists: Joe Luft and Harry Ingham. This is why they named the model Johari!

The purpose of this model is to help explain the dynamics of effective interpersonal relationships. Help participants understand this model by stepping through each part of the model with them as follows:

- Describe it as a window with four panes.
- Explain that the two vertical columns are labeled “I know” and “I don’t know.”
- Explain that the two horizontal rows are labeled “Others know” and “Others don’t know.”
- Move to the first pane: Public Self – this pane describes what I know about myself and what others know as well.
- Move to the second pane below Public Self – the Private Self; this arena reflects those things I know about myself but that others don’t know.
- Move to the upper right-hand pane, the Blind Spot – this pane reflects those things others know about me but that I do not know.
- Move to the lower right-hand pane, the Unknown – explain that this is a place in all of us where we don’t know parts of ourselves and others don’t know things about that either.
- Explain that this model’s dynamics are made possible by the interaction of two very important things: the seeking of feedback (this is depicted by the left to right hand arrow in the model) and the disclosure of self (indicated by the vertical arrow to the right of the model). We open our “public self” window when we engage in self-disclosure and the acceptance of feedback.
- The idea is not to open the public self entirely but to open it enough so that others can understand and know better where you are “coming from” and how best to work and communicate with you. The model also points out the importance of self-awareness through feedback and the impact of this self-awareness on interpersonal communication.

Make certain that people understand the model and ask if there are questions about it. A very good strategy to use to clarify the dynamics of the model is to use yourself as an example. For instance you can ask the group what they know about you – this will reveal your “public self.” You can then tell them there are things about you that they do not know (the “private self”) and actually tell them one thing, for instance that you are the kind of person who likes people to be on time. Point out that when you do this they now know more about you and the horizontal bar in the model is lowered somewhat allowing the “public self” to open up. This allows them to work in a more effective way with you. Then point out that there may be some things that they have noticed about you that you do not know about yourself and that if they were to tell you something you don’t already know about yourself that this would open up your “public self” by biting into the “blind spot” and giving you information you didn’t have before. This occurs through the process of feedback.

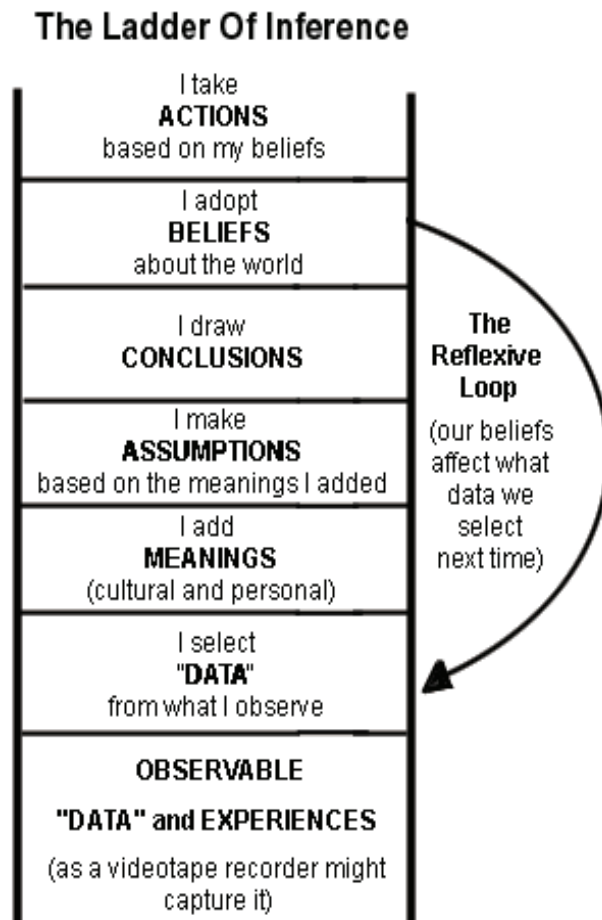
When you draw a dotted horizontal line about four inches below the original horizontal line and then another dotted vertical line a few inches to the right of the original one you are, in effect, opening up the “public self” and this is a very important aspect of effective interpersonal communication. Additionally you should point out that when you open up the “public self” pane you automatically dip into the “unknown” pane – this is the reason for the occasional “ah-ha” moments we have when we suddenly learn something new about ourselves.

Participant Exercise: First silently (5-7 mins) and then paired with another person (15 mins), consider things you could share with those you work with in order for them to understand you better. Then discuss strategies for getting feedback from others.

Debrief this exercise by asking people to offer their personal insights.

Explain that you will now be moving into looking at a new model that relates to how humans of all cultures are able to think and make leaps of meaning because of the human ability to infer meaning given situations or other stimuli.

Present Model III: The Ladder of Inference



Source: Senge, Peter et al. (1994) *The Fifth Discipline Fieldbook*. New York: Doubleday Currency.

Lecturette

This model was created by Harvard professor of communication, education, and organizational behavior, Dr. Chris Argyris. It describes the natural process by which human beings move from input (cognitive, visual, auditory, etc.) to beliefs and action. This powerful model helps participants see how easily they jump to conclusions and make assumptions and how these feed into their behaviors.

The connection between the Ladder of Inference and the Johari Window is that we are unable to open up our Blind Spot and to learn from others if we cannot actively slow down our race up our personal ladder of inference.

Key points:

1. Inferential thinking – that is, being able to infer something from a set of indicators – appears to be a skill unique to the human race.
2. Inferential thinking is important to our being able to function in our everyday lives.
3. In spite of the usefulness of inferential thinking it has a downside when people are trying to communicate with one another. Often people are at the tops of their ladders assuming that others are right there with them when, in fact, others are on completely different ladders making assumptions, drawing conclusions, and speaking and behaving out of the beliefs that these create.
4. Learning to introspectively think about what is causing you to say or do something is helpful in interpersonal communication. And seeking out the thought patterns of others is equally important in creating an effective communication.
5. To explain this model begin by suggesting that participants imagine that there are 360 degree microphones and video cameras in the room collecting all the available data about what is going on in the room. No one can assimilate all that input. So our minds “select” the data we are going to pay attention to. Point to the bottom of the ladder where it says “I select information.” Then describe that the way this model works is by reading it up from the bottom. On the second rung of the ladder, we add meanings to the data we selected. These meanings can be informed by our backgrounds and cultures. From that point we make assumptions based on the data we are selectively observing. After that we draw conclusions which then lead to adopting beliefs and from there we act or speak.
6. One of the most important aspects of the Ladder of Inference is that the cognitive process of inferring happens extremely quickly. We “race up the ladder” when we infer meanings. This happens in split seconds.
7. At this point you should ask the participant group what parts of the Ladder are visible to everyone in the room. Most participant groups figure this out quickly. The only visible to all parts of the Ladder are the bottom “Available Data” and the top “I act or speak.” What this means is that all the other cognitive steps we take are invisible to others making it difficult for others to understand how we arrived at the conclusions that we have.

Example for Ladder of Inference: I typically use a story that displays how people can end up being at the tops of their ladders and not realizing that they have sped up them and are not even on the same ladder. A story I frequently use is this:

Examples and stories are very good teaching tools. You should collect as many of these as possible so that you can use them at appropriate moments in your workshops.

A search committee has been named to help in the hiring of a new public services librarian at an academic library. There is one application and cover letter in the pool that is completely on target and that everyone is very excited about. Other candidates are interviewed as well but this one candidate is the one the search committee is really looking forward to. The candidate comes and does an excellent job in the interview answering the questions in imaginative and knowledgeable ways. Afterward the search committee meets to discuss and debrief the candidates. During this meeting one of the committee members, Jane, suddenly expresses misgivings about the favorite candidate by saying “I don’t think that he is really service-oriented enough for what we need.” Other committee members seem puzzled at first but then Jane says “Did you notice that he never once looked any of us in the eye when we were asking him questions? I just don’t think he can be public service oriented if he is so shy.” Please note that Jane has run up her ladder and has made assumptions and drawn conclusions based on the data she selected (the candidate’s down-turned eyes). Fortunately someone else, Dan, says “well I don’t think he is shy; he is Chinese and in his culture when someone in a greater position of power over him addresses him he keeps his eyes downcast as a gesture of respect. I think he is very service-oriented and I would like to recommend that we appoint him!”

This story points out how the meanings we attach to the data we observe can often be based on our own cultural background. Jane ended up at the top of a different ladder than Dan did. And the same could probably be said about all the members of the committee.

Ask people if they have ever been in situations where they feel the person across the table from them is crazy. Point out that it is very likely that this reaction could be due to the fact that the two individuals are at the tops of two different ladders of inference and therefore have completely different takes on the same situation.

Summarize the segment by connecting the concepts of inference to the concepts of self-disclosure and feedback. Knowing more about the thinking processes of others and about where they are coming from can help us communicate more effectively and satisfactorily.

Workshop Closure

Sometimes it is nice to have a short discussion at the end to help participants “connect the dots” of your lesson. You can return to the original objectives and ask your participants if they feel they have learned what you had set out to help them learn. A short discussion can help them feel like the workshop has returned full circle to the beginning.

End the workshop by reiterating the critical nature of communication skills in the practice of leadership. Thank the participants for their participation and eagerness to learn and wish them well as excellent leaders of libraries across the world.

¹Lee, Robert J. and Sara N. King. *Discovering the Leader in You*. San Francisco, CA: Jossey-Bass (2000) and The Center for Creative Leadership.



“Leadership must be emotionally intelligent and creative, in the context of creating a democracy - one that insists on continuing dialogue in order that libraries are planned with the people that they serve.”

“What Was Left To Do? Cry? No. Create. Create Libraries: ”

Transforming Communities Through Leadership and Library Service

Clara Budnik S.

Executive Director, Directora Ejecutiva/Foundation for Democracy and Development

Adapted by Sandra Ríos Balderrama

“Only with an impassioned patience, we will conquer that glorious city that will give light, justice, and dignity to all men.” (Rimbaud)

Introduction

I am happy to be part of this publication. First of all, thank you. Thank you very much for the chance of sharing my thoughts on leadership and its relationship to public libraries, and to share these thoughts from my perspective, from my own angle, from the angle of knowledge, the heart, and the practice given by experience – experience grounded in the many places called libraries and from the people that they serve. My thoughts emerge from the theories of many authors but also from the life experience of working and living in Chile and of having worked with different persons from different countries in Latin America.

In the story of public libraries in Chile you will find that the role of the people in this country, a country that is very long and narrow, that runs very north and south, a country made up of many diverse people, is of prime importance. Leadership must be emotionally intelligent and creative, in the context of creating a democracy - one that insists on continuing dialogue in order that libraries are planned with the people that they serve. To accomplish this co-planning, leaders must be able to inhabit the realities of the people, with respect and sensitivity. Our history makes us cognizant of coercion and imposition. Chile, as have many other countries, has had its history of horror – specifically I am referring to a history of dictatorship, disappearance, and censorship, under Augusto Pinochet, during the years of 1973 – 1990 when books and dreams were burned. Yet, a dream cannot truly be changed by an intruder, a life cannot just be simply halted, and a book – the writer’s words, meaning, and voice - cannot be forbidden. After a long time, no - it was not over night, people began to wake up, in order to say no to dictatorship and to put their lives at risk for democracy.

It is not my intent here to review the history of Chile but to point out, even briefly, the significance and impact of the context, the situation, from which public libraries had to be created in our country. People's determination, as part of their leadership capabilities, played a big role in bringing us where we are today and this must be acknowledged.

When our first democratic president, Patricio Aylwin, was elected, we found ourselves at a crossroads. We looked at the destruction, devastation, and the remnants that dictatorship and censorship had left behind. What was left to do? Cry? No. Create. Create libraries!

It is my hope that readers of this article recognize themselves in our struggle and determination. I am happy to share our story as other countries have shared, with us, the stories of their efforts to create accessible public libraries. The Thinking Outside of the Borders program as well as IFLA (International Federation of Library Associations) and other international organizations, bring us together so that we may re-arrange one another's models of services and adapt them to our own specific needs. Just the simple exchange of strategies from one country to another, generates new ideas, thoughts, and creativity, resulting in a collective effort to apply unique and suitable models worldwide. As we in Chile build "libraries without walls," our profession must continue to exchange without walls and without borders, in order to emphasize the library worker's role and responsibility as both a global and transformative leader, one that works with the people we serve, all along the way.

Public libraries in Chile have very unequal conditions due to economic, social, and geographic reasons. Regardless of these conditions, vigorous examples of leadership have appeared everywhere, many times stemming from an important precariousness of both the environment and the people's training. These leaders, however, have had the intelligence to read their realities, inhabit these realities, and then transform them! How does a leader transform his or her community through library service? By sharing our thoughts on leadership and then describing our own efforts to create public libraries throughout Chile, I hope to answer this question.

Leadership Proficient in the Art of Guiding

Words to Define Leadership

<i>Creation</i>	<i>Inspiration</i>
<i>Planning</i>	<i>Motivation</i>
<i>Attraction</i>	<i>Catalyst</i>
<i>Involvement</i>	<i>Guidance</i>
<i>Pleasure</i>	
<i>Participation</i>	
<i>Enthusiasm</i>	

Guidance involves inspiration, motivation and encouragement to not allow limitations to determine an outcome or one's future. Guidance is not coercion. It inspires determination and catalyzes planning. Leadership refers to the art of guiding men and women toward the future. The leaders are the individuals or the groups that are proficient in the art of "guiding," or taking people somewhere, in this case, into the future, a future determined not only "for" that community but "by" that community.

Librarians, library administrators, and library workers are in charge of public libraries in each region, city, or village of Chile and are thus, the main actors in the transformation of their own communities. Although the public libraries in Chile still experience many limitations such as poverty, social inequity, reduced budgets, and low salaries, they do not allow these limitations to determine the outcome of what public library service is or could be. Public library workers, as leaders, must be capable of noticing emotions and moods related to the hardships and barriers described and experienced by the members in their community. Their role as community leaders, then, is to inspire, motivate, and encourage the community in order to catalyze a conviction to begin the journey on a better road toward

a better future. “A better future” may mean a new outlook, a new world, a new perspective, possibilities, and potential – i.e. options that enable people to live with better alternatives and choices as they create their lives.

How might a library leader attract interest and involvement by the community through inspiration? Emotional intelligence is a critical factor. The community is not a product or an outcome or a profit. Emotionally intelligent leaders can describe and produce emotions as they lead human beings – who are made of language, action and emotion – to their own future. A key feature, then, of an emotionally intelligent leader, is the ability to genuinely connect with the pain and frustration of the community as if they are “feeling” the needs of the library service area by being connected to not only the library structures, the collections, the staff, or the procedures and protocols but especially to the people of the community – their events, their lives, their issues, their joys, their worries and their needs. Library workers, then, must be engaged with the community that they work in. They must participate with the community in understanding library services, library service potential, and library service visions. Once engaged with the community then issues are better understood and potential, possibilities, and envisioning may be generated together. In this way the library leader is not a distant outsider but involved with the community.

When we began to embark upon the creation of a “Participative Management System” in Chile, sociologists, psychologists, and librarians worked together and taught library workers how they could become engaged with the community e.g. learning their history, their interests,

Participative Management – A Closer Look

The aim of Mechanisms of the Participative Management is that the public libraries in agreement with The Directorate of Libraries, Archives, and Museums (DIBAM) – establish a dynamic, permanent, and fluid relationship with their respective communities. Each library constitutes a space for reading and cultural development, where men, women, boys and girls, find a place where their different information and cultural needs are welcome.

their needs, and concerns, and how they could inspire them not only to use libraries but to design libraries and advocate for them. The library workers of Chile learned to plan together with the community by asking them what they wanted. This took enthusiasm and effort, because there are a lot of differences between people in different regions of the country.

Still, the participatory management system was critical toward establishing a genuine trust with and respect for the community.

The creation of a library system and network involved agreements with municipalities, establishments of the first book purchase budgets, implementation of the first qualification courses, integration of jails and hospitals, obligatory open shelves, creation of the “Participative Management System” and the Bibliometro.

Public Libraries in Chile

Bibliometro (Library Net)–A Closer Look

These are lending points in subways for books in 12 Metro stations in Santiago. In the last decade they have loaned 600,000 books to the regular users of the subways. In this way, persons of all ages have been introduced to the pleasure of reading.

During the last two decades, public libraries in Chile have been experiencing a process

of change and transformation, generating more services, developing innovative projects, increasing the access to cultural goods for an ever increasing number of people in our country, providing information, culture, permanent education and recreation.

This development, acknowledged worldwide, is based upon an important number of leaders who are at the forefront of the libraries, overcoming adverse conditions and obtaining achievements, by working together with their communities. This has allowed for the development of a very good number of public library initiatives.

Many of these initiatives began as a vision and in the process of making them realities, it was soon discovered that in each corner of the country there is room for dialogue. “Libraries”, as we saw them, were not only buildings or rooms but places and spaces for dialogue, the dialogue that is required for democracy. Many “libraries without walls” were created to accommodate this philosophy. We found that spaces could be created for gathering,

meeting, and encountering new discoveries, for everybody.

The First Public Library Programs (1993)

Children’s Corners

Child & Youth Literature Selection Committee:

Librografia

Traveling boxes

First *Bibliobus* (mobile library) - serving the rural sector

The Public Libraries Network in Chile–2008:

- 435 Public Libraries
- 378 Libraries with BiblioRedes service
- 16 Prison Libraries
- 9 Hospital Libraries
- 60 Mobile Services
- More than 100 different lending points

Up through the year 2000, other exciting initiatives were created. Some of these ideas were taken to Spain, Peru, Brazil, Bolivia and Uruguay. Some were borrowed from Peru and other countries such as the Book Postmen, Biblio-Boats, Book Carts, Book Messengers, The Yellow Library Bikes–Biblio-Bikes, Community Libraries, SIC–Community Information Services, Diba-Mobiles, Cultural Buses, and the Kiosks in Valparaiso. In the

present day, we now have our New Century Initiatives such as the Open Air Market Lending Point/ “El Casero de Los Libros.” This project involves the creation of book lending points at Open Air Markets. That is, between lettuces, potatoes and tomatoes, near the onions, baskets with books appear, which the neighbors will be able to borrow as members of this new service.

We are proud of each and every initiative however, BiblioRedes was very profound in the sense that we were able to train many people that were poor or that had no computers at home

or that lived or worked in isolated areas of Chile. There is a great diversity in Chile that includes many regional sub-cultures and co-cultures in the urban and rural areas. What was most exciting was that once people were trained they began to create their own content, in their own

BiblioRedes: New Century Initiative

The BiblioRedes Project was developed with the support of the Bill & Melinda Gates Foundation and the Chilean Government. It aimed to provide computers and Internet connections to public libraries as a way to overcome the digital gap in our country. It included three phases:

Phase 1: Training

Phase 2: Creation of Local Content

Phase 3: Creation of Digital Services

voice, on the Web. Villages or islands that were not present or visible on the Web now would have a Web site designed by their own people. This outcome was in line with the philosophy of participatory management and leadership that requires guidance, involvement, creation, and effort.

The Model Public Library:

We are now looking at the creation of a model library with services that embody and deliver on the following defined values: identity, recreation, culture, community, education, knowledge, encounters, information, access and new technologies.

Our main objective is the delivery of information services, the preservation and dissemination of culture, personal development and self-training. We pledged for equity of access to information, extension activities, training and for the welcoming and integration of people through library services especially designed for the community and with the community.

We have since built the Santiago Public Library which is 20,000 square meters and by the time this publication reaches you, three more will be built. We built this library as a model for the creation of many more libraries in each corner of the country: a model of service, of philosophy, of what a library must be- a model of dreams. The services provided were determined by 121 focus groups in the community.

The form and structure of the Santiago Public Library is based on the principle that the human being is the main focus, and therefore, we are interested in having the best books, the best technologies, the best librarians, the best furniture and the prettiest building - but in that order, not backward.

In line with the philosophy that the human being, the person, and the community are the priorities of service, we created the following protocols and operating principles and would like to apply them beyond the Santiago Public Library, to all of our libraries:

Signage

- Prohibitions are not necessary.

Book display

- Books are not arranged by DDC or LC.
- We want to look like a bookstore and thus, have front facing books.
- Any format is accepted.

Access

- Every social group is accepted, except for intolerant ones.
- Every expression is accepted.
- Every ethnic group and nationality are accepted.
- We favor the most deprived groups and the most welcome are the “marginals” - people who live on the margins of our society.

- Being cost-free is fundamental for access.
- There will be a rental fee for any non-library related activity.
- Participation of the community in the decision-making process is a key issue.

Services

- We accept ideas and projects, with the condition that they are innovative.
- When decisions are made, the people whom are served by the library are considered a priority in the decision-making process.
- A story, a poem, or any text is read daily in the library.
- Everything is possible in the library!

Within these operating principles you will see that people are our primary focus. Our libraries must involve them and be accessible to all people. We are on our way to establishing a “culture of literacy” in libraries; however, we understand clearly that there are still potentials and possibilities that do not stop with reading. We see the public library as the mediator between the accumulated culture and its community. In the global world, the library speaks about us and to us. The library is a place of our own. It is the new civic center. It is the new plaza (public square) – so important to Latin American culture. It is the heart.

Leadership

How did we make the journey of transformation this far? With a people-centered leadership style. Here are some of my concluding concepts and ideas on leadership. As you read them, think about the librarians, library workers, sociologists, psychologists, everyday people, villagers, and islanders that worked together to bring public libraries in Chile this far.

A leader:

- is a very good planner, one who has clear objectives.
- is the one who can permanently struggle with success and failure without allowing either to blind him or her.
- is the one who is practical, the one who takes the best of something and reorganizes and re-shapes it.
- is the one who dares and is courageous.
- is the one who is fascinated with what she or he is doing.
- is the one who knows him/herself, who knows his/her own virtues and limitations, the one who fights with his/her own needs and passions.
- is the one who is in touch with others; has great ideas, and makes the best decisions, and communicates them properly.
- is not the one who knows everything, but is the one who knows how to listen to the ones that know best about certain issues and to those that live the experiences, in order to get the best transmission of their knowledge and needs.

- is the one able to break paradigms, to create libraries in a different form or from a different perspective than the one everybody typically thinks of.
- is the one who is able to move a whole community together with his/her team.
- is the one who designs library service with the community as the engine of the library.
- is the one who is creative!

Conclusion

Did I say that transformation was easy? No. There were and are still many challenges but when we make a decision to create with determination and with the community, it becomes possible. When the people of my country decided not to cry, but to create, it became possible. What this meant was that we had to honor history but break with it in order to think outside our mental borders, psychological borders, cultural borders, and even traditional leadership borders in order to accomplish the vision and models of public libraries in Chile today. Below are a few “consejos” to help you think outside the borders, as a library leader, that will guide the community with their needs and dreams in mind:

Consejos - Pieces of Advice

- Look for more than one alternative, look for many alternatives!
- Look at problems as opportunities!
- Take risks!
- Have courage and dare to be different!
- Question rules and presumptions!
- Be persistent. Never give up!
- Be an explorer!
- Invent your own principles!

Finally, I leave you with a favorite inspirational quote. My best wishes go to all readers of this publication in your efforts to transform traumatic censorship into a collective and celebratory voice, to transform limitations into possibilities, and to transform debilitating ghosts into creativity! Create. Create libraries!

- “Take good care of the earth. It does not belong to us. It belongs to our children. We must give it to them in better condition than when we received it. And with it, we must deliver the words that name everything that exists in the universe. And with the words, the value of life.” African saying



“...we all struggle to gain sufficient support for our libraries. Whether one is located in Madrid, Spain; Córdoba, Argentina; Athens, Greece; or my hometown of El Paso, Texas USA, there never seem to be enough resources to fully promote library services and literacy to our communities.”

Library Advocacy in a World Community

Carol A. Brey-Casiano

Director of Libraries, El Paso Public Library

Introduction

As I have traveled around the world giving training sessions to librarians and library stakeholders about the importance of library advocacy, I have been struck by one commonality: we all struggle to gain sufficient support for our libraries. Whether one is located in Madrid, Spain; Córdoba, Argentina; Athens, Greece; or my hometown of El Paso, Texas USA, there never seem to be enough resources to fully promote library services and literacy to our communities. The American Library Association (ALA) and the International Federation of Library Associations (IFLA) have partnered to create the Campaign for the World's Libraries, a valuable tool for anyone attempting to generate more support for her local library.

During these library advocacy training sessions, I generally cover three major topics:

1. The state of global advocacy for libraries
2. How the Campaign for the World's Libraries can be an effective tool for global advocacy, and
3. An Introduction to advocacy planning, using the Library Advocate's Handbook.

When thinking about library advocacy, it's important to know what you want to accomplish through your advocacy campaign. Do you want to gain support for a new library facility? Pass a tax referendum? Increase your library's overall budget? In order to think through what you want to accomplish effectively, it sometimes helps to dream a little, envision what your library will look like when you have accomplished your goal.

So, let's imagine what the library of the future might look like, based on an account from the book *“A Library for All Times,”* and published by the Swedish National Council for Cultural Affairs.

“It is night time in Malmö, Sweden in the year 2010. Even

though it is after midnight, lights shine through the windows of the big library. For the past few years it has stayed open round-the-clock. Plenty of people are here. Self-service is now fully integrated, but there are staff in every section of the building to help with questions, advice and consultations. Why do people come to the library in the middle of the night? Set work schedules have not only changed, they have disappeared. More and more people are working from home. The number who study has multiplied many times over.”

“To get access to reading space, advisory services, equipment and collections, people have to be prepared to come at odd hours of the day. But still they all study, to improve their qualifications and learn new things...Work and study! The library is needed more than ever.”

The book goes on to state that John Naisbitt was right in his book *Megatrends* (1982) when he coined the term “high tech, high touch.” This means that the more high technology distances us, the more important human and social contacts become—such as those one can make at the library.

So let’s ask ourselves: does the Library in Malmo present an accurate picture of libraries in three, ten, even twenty years from now? What are some future library trends that we might envision?

As a Past-President of ALA, it is exciting to talk about the future of libraries from the perspective of our Association. I have identified four areas that I feel encompass the most important trends that are now emerging:

- New Technological Developments
- Library & Community trends
- Lifelong Learning Opportunities
- Enhanced Sustainability

The Library and Community

For the purposes of this session, our definition of “community” is more than the city or campus your library serves. A community is a group with common interests, one that shares items or ideas in common—and one that could transcend the physical boundaries of your own city, campus, or school. Now let’s talk about trends in our libraries and the communities we serve.

The study *Falling Through the Net* revealed some other interesting facts about how our communities are changing, and the impact that changing demographics can have on computer and Internet use in libraries. For example, the study showed that Asian Americans and Pacific Islanders have the highest level of home Internet access at 56.8%. African Americans and Latinos have the lowest level at 23.5% and 23.6%, respectively. Unemployed and certain minority groups (African-Americans, Asian Americans, Pacific Islanders) are more likely to use public libraries for Internet access. In El Paso, which is 80% Hispanic, we have certainly observed wide usage by Latinos as well.

And, it should be noted that the Latino or Hispanic population is now the fastest growing minority in the United States. In El Paso, which has a population that is 80% Hispanic, this

translates into nearly 500,000 Internet users a year! Think about your own community, and the changes you have seen there in recent years—changes in demographics, the economy, size and other changes that could affect your ability to provide library service.

At the same time that our communities are experiencing changing demographics, we are also experiencing some major cultural and societal changes, many of which occurred after 9/11. Some might say we are facing the very erosion of democracy, with the debate over the USA Patriot Act and continued challenges to intellectual freedom. ALA members have challenged the Patriot Act on many levels, and have supported members of Congress in their attempts to pass new legislation that will restore our nation's right to privacy in the library.

To make matters worse, library closures that first occurred in Salinas, California and Bedford, Texas rocked the library world as unthinkable. I am pleased to say that both libraries were able to raise enough funds to remain open, but these situations made us realize how important it is to advocate for libraries even when times are good.

So how can libraries respond to the changes in our communities? Some trends we are seeing from a national perspective:

- **The Library as a Community Center**—I believe there is still much truth to the term “high tech, high touch.” We are seeing that the more high technology distances us, the more important human and social contacts become—and the more people seek these at their local library. People come to the library to hear an author speak, view an art exhibit, watch a movie, listen to a story, or have their picture taken with Clifford, the Big Red Dog!
- **The Library as a Cultural Institution**—“*A Library For All Times*” refers to the Library as “the showroom of the knowledge society, where everything is available for demonstration, and whose products, media of grand scope, more and more take on a virtual form. So that users will not drown in this information colossus, the library plays an active editorial role and devises and presents search menus and materials around themes, in exhibits and its own multimedia productions.”
- **Sophisticated market research**—We are learning more about our communities than ever before, through surveys, focus groups, and “smart” web sites.
- **Renewed outreach programs**—Even in this era of library budget cuts, outreach is not dead! We simply need to be creative, foster effective partnerships with outside agencies, and not try to do everything ourselves.

Probably the most important point to note is the growth of grassroots library advocacy around the world! During my ALA Presidency, we worked tirelessly to create a worldwide network



of advocates, helping librarians around the world to share ideas, resources and more. The Campaign for the World's Libraries made it possible to create a global advocacy effort that began in 2001 as a collaboration between ALA and IFLA.

Global Advocacy Takes Root

In 2002, I gave one of the first international trainings for the Campaign for the World's Libraries as part of “Las Jornadas,” the Annual Conference held by AMBAC, the

Mexican Librarians' Association, in Monterey, Mexico. In 2004, the President of AMBAC at that time, Saul Armendariz, invited me to present a training for the library leaders library associations throughout Mexico and Central America.

One of the best tools you have as a library advocate is this Campaign, which in the United States is called The Campaign for America's Libraries and has been in existence for 8 years now. It is very easy to join.

The Campaign for America's Libraries—Where It All Started

The ALA Campaign was created in response to research conducted by ALA that shows:

- Libraries are popular, but taken for granted.
- Libraries are ubiquitous, but not often visible.
- Libraries are unique, but facing new competition.

To date, 20,000 libraries have been involved in the Campaign for America's Libraries in all 50 states. New public awareness-building toolkits and materials have been created specifically for 5 different types of libraries and librarians. Tens of millions of people have heard the message about the value of libraries and librarians through partnerships and media relations efforts.

The Campaign Objectives include:

- Increase awareness and support for libraries.
- Increase the visibility of libraries.
- Communicate why libraries are both unique and valuable.
- Update the image of libraries, librarians, and all library staff for the 21st century.
- Bring renewed energy to the promotion of libraries and librarians.
- Bring the library message to a more diverse audience.

This Campaign has goals that are internal to the profession as well:

- It is useful to all types of libraries.
- It provides a mechanism to share public relations, marketing and advocacy "best practices" within the library community.
- It brings together all ALA promotions into one unified brand; @your library.
- It promotes a quick response to emerging issues such as library funding cuts.
- It promotes the contributions of library staff.



are implementing the Campaign.

The IFLA Web site also contains links to many of the countries that are participating in the Campaign. For example, Singapore has an “@ the library” newsletter that appears on its Web site with stories about advocacy supplied by its members.

Campaigns for Other Types of Libraries

There are now campaigns available for five types of libraries, each with its own toolkit and other resources to assist with implementation.

The Academic and Research Library Campaign was launched in April 2003 by the Association for College & Research Libraries (ACRL), a Division of ALA, to promote the value of academic and research libraries and librarians. There is a toolkit, a Web site, and a discussion list to assist in implementing this campaign. To find out more, visit the ALA Web site.

The School Library Campaign was launched in October of 2003 by the American Association of School Libraries (AASL), another Division of ALA, to promote the value of school library media specialists, programs and centers. It also features a toolkit, Web site, and discussion list. To find out more, visit the ALA Web site.

In September 2004, the Public Library Association (PLA), a Division of ALA, launched the Public Library Campaign, with the goal to make “the library card the most valued and used card in every wallet.” Comedian George Lopez served as the spokesman for this Campaign when it first launched, and there are many bi-lingual resources available in both English and Spanish. To find out more, go to ALA’s Web site.

Then in November 2006 the Association for Library Services to Children (ALSC) launched the Kids!@ your library Campaign, with a special song by Bill Harley composed especially for the Campaign entitled “So Much To See, So Much To Do @ Your Library.” There is a new logo for this Campaign, a toolkit and a tip sheet available at the ALA Web site.

ALA has also developed new tools and resources to help small rural libraries (with populations under 10,000) conduct advocacy and outreach efforts in their communities. For more information, go to the ALA Web site.

Some other new toolkits that will be coming soon include YALSA @ your library, a new Campaign developed by ALA’S Young Adult Division. A toolkit for tribal libraries is also planned, as is one on “Tips for Transforming Libraries and How Libraries Transform Communities.”

Resources in Spanish/Recursos en español

ALA has developed some great advertisements and other resources for this Campaign that are available both in English and Spanish, which can be used to promote libraries to Spanish-speaking library patrons around the world. They are colorful and slick, developed for use in local, regional and national magazines and other publications.

The first advertisement reads, “The future is @ your library...so make sure your library has a future.” It goes on to say, “libraries can’t help our children if they are closed.” To find out how to support the fundraising efforts of your library, and how you can promote the services of the library, contact your local library.

The second advertisement reads “Books. Magazines. Compact Discs. Videos. Databases. Special collections. Research services. Libraries provide access to everyone—regardless of your age, ethnicity, income level, language, or place of residence.”

The third advertisement reads “Imagine going to your library and not finding anyone there to help you. Support higher compensation for librarians and library workers in our country.”

All three ads state that they provide “A message from the Campaign for America’s Libraries.” However, these ads could easily be adapted to campaigns in other countries.



Funding for the Campaign

All funding for the Campaign for America’s Libraries is provided by ALA’s partners, which in 2007 were: IFLA, the National Baseball Hall of Fame, Dollar General, and *Woman’s Day* magazine. These partners provide nearly all of the financial support for the campaign as well as special programs to help promote the campaign. For example, the new program “Step Up to the Plate @ your library” was developed by ALA and the National Baseball Hall of Fame to encourage young people to

write about their favorite baseball book. Last year the program was promoted by baseball greats Ozzie Smith and Ryne Sandberg, with the grand prize being a trip to the Baseball Hall of Fame.

Woman’s Day magazine has had a long-term partnership with ALA, and in 2007 ran an essay contest entitled “How the Library Changed My Life.” Four women won the contest, which drew 1,500 entries. Their very moving entries were published in the March 2007 issue of *Women’s Day*. Also in 2007 Dollar General began its sponsorship of a grant program entitled “The American Dream @ your library” which provided grants for selected libraries to expand their literacy collections, programs and services for adult immigrants and English language learners.

Examples of the @ your library trademark

There are many ways in which the @ your library trademark can be used to advocate for your library, and some of them can be seen in the examples that follow...Enjoy!

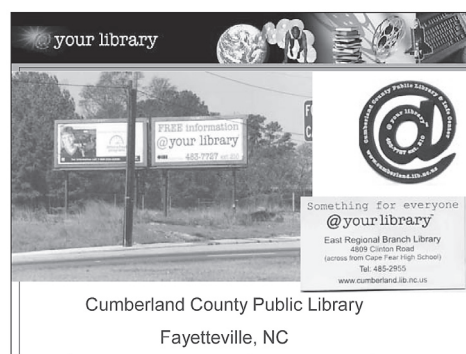
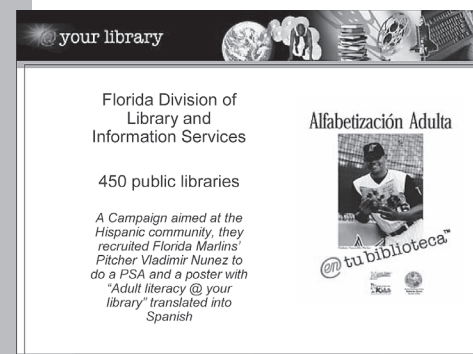
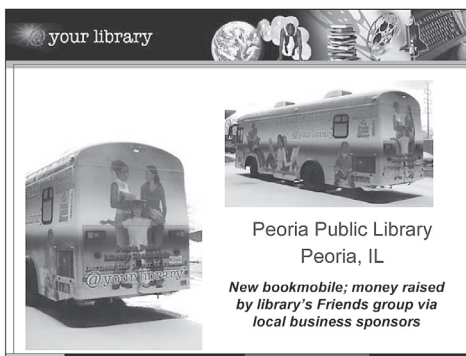
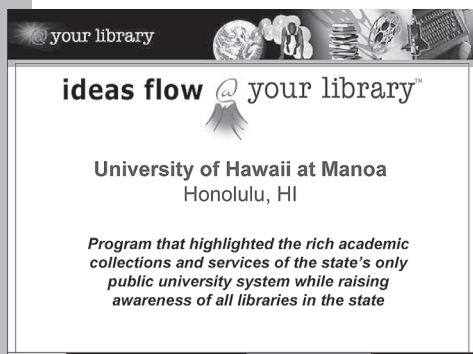
- University of Hawaii at Manoa Honolulu, Hawaii Program that highlighted the rich academic collections and services of the state’s only public university system while raising awareness of all libraries in the state.
- Maryland Library Association/Maryland State Department of Education - Three-year statewide @ your library campaign. Includes downloadable artwork and more.
- Florida Division of Library and Information Services - 450 public libraries. A Campaign aimed at the Hispanic community, they recruited Florida Marlins’ Pitcher Vladimir Nunez to do a PSA and a poster with “Adult literacy @ your library” translated into Spanish.
- “ASOCIACION MEXICANA DE BIBLIOTECARIOS, A.C. and ASOCIACION DE BIBLIOTECARIOS GRADUADOS DE LA REPUBLICA ARGENTINA - Campaña para Las Bibliotecas del Mundo.”
- Peoria Public Library, Peoria, Illinois - New bookmobile; money raised by library’s Friends group via local business sponsors.

Conclusion

I find it so inspiring to work with library advocates around the world. The creativity, enthusiasm, and dedication I have encountered give me new hope, every time, that we can make a difference in our communities. From the librarians of El Salvador who started their own national “en tu Biblioteca” campaign to the school librarians in Greece who translated the entire *Library Advocate’s Handbook* into Greek, you have made it possible for more people, worldwide, to take advantage of the lifelong learning opportunities available from our libraries.

For those of you who would like to learn more about being a library advocate in your community, I encourage you to check out the latest edition of ALA’s *Library Advocate’s Handbook* (in English!) on the ALA Web site.

In this guide you will find helpful tips on building your advocacy network, developing your Advocacy Action Plan, telling your library story, dealing with the media, and working with legislators. An earlier edition is also available in Spanish, *Manual Para Promotores de Bibliotecas*.



This is a great basic guide for any advocate, which will help you plan for your next big campaign--or just practice good advocacy techniques. If you have questions or comments, please don't hesitate to contact me at cbrey75@hotmail.com. I look forward to hearing about all the advocacy work you are doing @your library!



“What is universal in the experience of adult literacy is that through knowledge we are helping individuals reclaim their freedom using tools that enable them to evolve independently.”

Konesans se Libète - Knowledge is Freedom Burdens and Paradoxes of Literacy in Haiti

Elizabeth Pierre-Louis

Library Program Coordinator, Fondation Connaissance et Liberté, Open Society Institute, Haiti

Intro/Context

Growing up in Haiti, I used to hear a public health announcement: *Konesans fanmi se lespwa timoun, Parents' knowledge means hope for children.* The ads talked about hygiene, vaccination campaigns and best practices to lower the alarming children's mortality rate in my country. Since fifty percent of the Haitian population is under 18, it seems legitimate to think that the other half of the population is made up of parents who should be involved in bettering their children's lives.

*Fondation Connaissance et Liberte Haiti - FOKAL
Created in 1995, the Fondation Connaissance et Liberte, Foundation for Knowledge and Freedom is a national institution that is part of the network of Open Society Institutes created by Georges Soros in Eastern Europe, Southern Africa, Latin America and Haiti. FOKAL's mission is the promotion of structures for a democratic society, the use of education to support autonomy and critical thinking and the reinforcement of organizational processes. The Library Program works with 35 Community libraries, small structures managed by community associations and groups, and receiving no support from the state.*

For eleven years I have been working as a librarian at FOKAL, an acronym which stands for Foundation for Knowledge and Freedom. Again this is the same refrain in a larger scope. What is universal in the experience of adult literacy is that through knowledge we are helping individuals reclaim their freedom using tools that enable them to evolve independently. Acquiring skills to read and write are much more than scholarly activities, today more than ever they give access to the world. Since 1997, it has been exciting to watch the rise of digital use

throughout the world. How amazing it is to surf the world wide web, to consult an online catalog, to chat with foreign colleagues, to organize seminars via email.

But at the same time the reality of Haiti and the lack of resources make our task a daunting one, like a whirlpool quickly pulling us toward the bottom.

How to function in a capital city with four to six hours of electricity per day? Alternatives are to use expensive solutions that many small libraries cannot afford. How to access the internet when the phone network is constantly out of work? (Haiti missed the fiber optic cables connection in the 70's.) Once again, the solution is to use expensive and almost experimental alternatives that overload very quickly and block the system chronically from noon until 4 pm. And this concerns the capital city, where most of the country's infrastructure is concentrated.

Another important burden is the problem related to literacy issues in Haiti. There are two very important aspects here to consider.

Haiti

- *Haiti is located in the Caribbean, neighbor to the Dominican Republic*
- *Political system: democracy with an elected president*
- *Two official languages: French and Creole*
- *Very dense population: 8.2 million inhabitants for about 27,000 square miles*
- *Very young population: 50% is under 18*
- *Population still very rural compared to other Caribbean Islands: 60% in rural or semi-rural areas*

There are two terms in French to address levels of literacy. "Analphabétisme" concerns persons that were not exposed to the school system and have no knowledge of the written word. This issue has been addressed in most countries by universal access to primary schools. In Haiti still about 40% of children aged 6 to 23 do not go to school. Out of the 60% that do go to school, only 15% have access to the public system, the rest are left to attend private institutions that are more expensive and with less controlled standards.

This brings me to the second aspect, more widely spread throughout the

world, illiteracy. Here the issue is more complex since it concerns individuals that "fell through the cracks," who went to school but either never acquired well the basic skills or progressively estranged themselves from the learning process. Here statistics are harder to gather, since once a child is veered to school, he is considered as saved and enters the statistics of the literates. The major problem is that the high demand for school is mainly supplied by private initiative, more mercantile than service oriented. In these schools, overcrowded classes and tired instructors have a delayed but equally devastating impact on literacy. Certain students at high school level cannot comprehend a simple text or write a coherent answer to simple questions. At the same time, their interest in learning is evident and expressed.

Last but not least is the language issue. Haiti has two national languages, French and Creole. While Creole is widely used by all the population, French is not totally mastered. Official documents, advertising, textbooks remain mostly in French and very little written production is done in Creole. Few schools really abide by the law to start reading and writing in Creole at the primary level, often teachers themselves do not master French or do not have the tools to teach in Creole. This dichotomy often accounts for the lack of confidence of students and subsequently their poor performances.

Well, what can be done for adult literacy in a Digital Age in Haiti?

The inventory of burdens serves to understand our context, but not to isolate or stop our efforts. It just helps to understand where we are coming from and what we are striving to achieve.

In the process of writing this article, I gave birth for the first time. While my son is not concerned by the aspect of adult literacy - and hopefully he will not be - this overwhelming and primal experience has made me think about the means of transmission of knowledge, values and practices. What is important to leave behind as a legacy to the coming generations? As librarians, how can we impact and change the dire aspects of literacy in our societies and help transcend the digital divide?

All of these questions will not be answered in my article. But let us engage in a path of discovery “*outside borders*” and my hope is that what is foreign seems more familiar, that sharing a particular experience may trigger a general outlook and that an uncommon practice will look coherent to all readers and generate a dialogue.

Module

1. *The community libraries*

Libraries in Haiti

- *National Library and 18 municipal libraries*
- *French Institute and 6 Alliances Françaises*
- *10 CLAC Centre de Lecture et d'Animation Culturelle (Centers for Reading and Cultural Activities)*
- *35 Community Libraries supported by FOKAL*
- *Academic Libraries*
- *Private School libraries*
- *Private research libraries*

Since 1997, the Foundation has been working with associations and groups interested in promoting reading in their city neighborhoods or villages. None of the staff were trained, the collections were sparse and developing, the buildings often ill-equipped. Nevertheless the motivation for a wider access to books and by extension knowledge was contagious. Libraries were needed to support the failing school system. While schools provided the tools, libraries were the training place to expand literacy skills. The experience started slowly, by supporting three libraries, within cultural centers, association headquarters and community centers.

No library was created by the Foundation, it was more important to support and expand existing efforts. Yet, everything needed to be

thought of: training, collection building, furniture, and budget. With the help and guidance of the Mortenson Center for International Librarian Programs - University of Illinois at Urbana-Champaign, it became possible to structure the Foundation's vision and prepare strategies for the existing library program. It took several years to establish a training program adapted to small community libraries, but through a trial and error process, we are still learning from our mistakes and improving our practices.

a. Local history to foster visibility and literacy

One important emphasis for these libraries was to give them a solid ground within the communities they were established. In 2000, for the 250th anniversary of the capital city

of Haiti, Port-au-Prince, the idea came to create a Festival in each library in the city, 13 in total. This was not the first Festival. In 1998 three libraries celebrated renown 17th Century French Fabulist Jean de La Fontaine and in 1999 the great writer, poet, thinker Aimé Césaire. This time ten more libraries participated in by this local history Festival. The title was “Port-au-Prince, our city our neighborhoods.” Each library received a questionnaire, in order to start researching about the history and landmarks of their neighborhood. It was important to focus on the history, of course, but also on the actual inhabitants and how their actions were shaping the locality in which they were living. Bios with pictures were presented and the whole community was invited to a week of conferences, exhibits, workshops. The attraction was undeniable, and the outcome was measurable on the renewal and new memberships. The local press took notice of this event and the local community was able to use the library as a place of gathering as well as living legacy. What was truly important was that even those who could not read were able to recognize their neighbors and even themselves on the pictures and bring their family to see their accomplishments. This event also helped structure and define future programming within the libraries.

b. Library involvement in Literacy

These libraries, generally managed by youth groups supported by their communities, are located in the capital, small country towns and in rural areas. In a country where the majority of school-age children has no access to school or receive education without books, the goal is not to preserve documents, or to create an impressive collection of books, but rather to promote reading and research, provide access and thereby spread the use of the written word. The mission of community libraries should be the promotion of literacy and in fact many of them try to incorporate some aspects in their daily activities. Nevertheless teaching basic literacy skills should be the prerogative of skilled professionals not untrained library staff.

c. Using new technology, a slow process

What should the role of Libraries be?

There should be real involvement of all libraries in Haiti in the literacy process.

- *To offer space*
- *To support tutors*
- *To offer materials susceptible to interest newly literate persons*
- *To offer activities that touch a large range of people*
- *Introduce new technologies*

Out of the 35 libraries, about 10 of them offer multimedia services. Only 3 have internet access. At the end of the 90's there was a great demand for the internet in Haiti, mainly for international calls. The wide development of cellular phones since 2000 created a lesser demand for the internet. As a result the library computer labs are less thriving but still offer space for surfing, text editing, downloading and other practices.

At the same time, all libraries are still manual. It was important for us to enforce the practices of library work before offering online catalogs and databases. Since there is so little infrastructure, this was a good approach for the past years. But the Monique Calixte library, main library of the system is now ready to go to another level, circulation rates are up every month, which means that envelopes and cards are piling each day at the circulation desks. This is a great opportunity to refocus on the

collection, do important weeding and prepare for training the staff as well as the patrons to cope with this new information literacy.

2. Training and literacy

a. Training adults coping with literacy issues

One of our biggest challenges was training. The staff of the community libraries was motivated but there is not a culture of library use in Haiti. There are very few municipal libraries and few children are exposed to this public service. Though I grew up with books within the private realm of my family, the first time I entered a public library in Haiti I was seventeen and it is one of the lasting memories of my life. I kept thinking: "It does exist!"

The library program had to deal with staff that is not used to books or reading. One of the first initiatives was to create a training video at The Frederick Douglass Library Branch of Champaign Public Library (Illinois). This small but complete library was ideal to show different spaces and service without being overwhelmed by the size of a public library. The training video was then shown at each training session, an entertaining way of breaking the routine and stimulating discussion.

Another important training lesson was to use children books for adults. There are many great books for children, the print is large and the style simple. To interest the trainees, we had them simulate exercises with children and these methods were equally useful for the staff as well as the patrons at a later time.

Finally we realized that competition within the training session was an excellent incentive. Grades and exercises for adults are a great stimulant especially if the outcome is practical and based on daily activities.

Reading for pleasure

"What research tells me is that if children and less literate adults start reading for pleasure, however, good things will happen. Their reading comprehension will improve, and they will find difficult, academic-style texts more comprehensible. Their writing style will improve (...) Their vocabulary will improve at a better rate than if they took one well-advertised vocabulary building courses. Also, their spelling and control of grammar will improve."

· Krashen, Stephen. 1993, The Power of Reading, Insights from the Research, Colorado, Libraries Unlimited p. x.

A colleague from the Bibliotheque Departementale de Pret in Guadeloupe recently held a workshop about literacy and library practices. She used very down to earth methods such as using popular magazines to write stories. While there are no specific classes for illiterate patrons at the library, it is possible to think about new activities that will include literacy development.

The use of thematic programming has had a great response in the past. For six months in 2006, a literary genre was showcased: mystery, adventure, poetry, great love stories etc. Exhibits, discussion groups, conference, movies were chosen in relation to the theme. The activities touched every age group and were centered around the collection even if reading wasn't required to enjoy the activity. This year, the program contains: "One month, one book." One person from the library chooses her favorite book to read to the public. Before the reading, excerpts from the book are displayed as well as information about the author and other books. This familiarizes the public with the upcoming activity.

One very exciting prospect is coming to light, the possibility of opening a library within a botanical garden project in the southwest of Port-au-Prince. This botanical garden will be situated in an abandoned luxury hotel where the international jet set used to party in the 70's. The whole neighborhood was in the middle of political unrest and gang violence for the last five years. Now the government and local associations with FOKAL as lead agency, are working together in peace to create the first botanical garden in Port-au-Prince. The garden-library will serve a community that has been completely abandoned by city officials. Collection development as well as programming will have to be designed in order to serve very special needs, to reconcile the demands of the community and those of the project. Literacy will be the cornerstone of this library's goals.

Conclusion

Tips for literacy development within a library

- *Have a core staff that really shares your vision*
- *Invest in training*
- *Remember the pleasure of reading and spread it around*
- *Develop the sense of public service*
- *Have activities that you would enjoy attending, but also that your children or siblings would enjoy*
- *Ask questions of other colleagues*
- *Adapt practices from other libraries*

Through the experience of the small community libraries we work with, it has been possible to reflect on the impact of literacy and the diffusion of knowledge. Even though our primary target group in these libraries is children, it appears that the 15-30 age group is the most represented. Also new technologies in communication have made contacts much easier and at an international level it is possible now to consult with librarians throughout the world to share experiences. This international informal information database has been very helpful in orienting strategies and practices. Many of the activities presented here were gathered through library visits, professional articles or informal discussions with international colleagues. The most important asset in "thinking outside borders" is that we

are not constantly reinventing the wheel, there are years of experience for us to acknowledge, rethink, use and then share again. This constant process is the fuel of our literacy endeavors and librarianship.

The most important lesson to be learned about our experience is the pleasure of reading and the will to develop public reading. Literacy will take years to settle in Haiti, but with some efforts it is possible to offer an alternative, a breathing space that can be emulated at a later time. A country that doesn't invest in literacy cannot go forward. Likewise a society that divides through the monopoly of knowledge opens the door to violence and unrest. Libraries can be a haven of knowledge and freedom, *outside borders*.

ACTIVITIES:

Icebreaker

This activity is very simple.

There should be a photograph that illustrates the text where the student is shown doing his favorite activity or is with his family.

- Write a short text presenting yourself
- Think about one or two things that define you to the outside world
- No more than four lines
- Very simple wording

This exercise is inspired by the literacy work text *Collaborations, English in our Lives* by Donna Moss, Cathy Shank and Linda Terrill, Heinle & Heinle Publishing, Boston.

It brings a sense of reality to the writing experience. The student is thinking about very basic things that define him or herself.

Organizing a Local History Festival

This activity is very inclusive for all the community. It can be done once or regularly. It is surprising how much information can be gathered very quickly and attracts other patrons to the library.

- Prepare a questionnaire or guidelines for research about your community/neighborhood
- Identify key living personalities
- Write short bios, take pictures, live recordings
- Organize a program related to your findings (an art exhibit if your locality has many artists, etc.)
- Invite the whole community, contact the press
- Make follow-up programs throughout the year

A specific program at the Pyepoudre Cultural Center: Theater and Literacy

This activity is an example of how, sometimes, illiteracy can prevent people from telling their own story to others and how it is important to rethink the whole process of learning in order to share powerful experiences.

- Working with women victims of rape
- Library served as a place to receive the testimony
- Then these oral histories were written into a play
- The women had to be taught their lines orally since they could not read.
- The play was also filmed and subject of a documentary



“Recently, the importance of disaster preparation for librarians and cultural heritage professionals has been highlighted by large-scale weather-related disasters such as hurricanes and tsunamis. Given the wide-spread evidence that climate change may magnify such events, preparation becomes increasingly critical to the survival of our cultural heritage.”

Disasters Know No Borders: The Crucial Nature of Disaster Planning

Julie A. Page

*Co-Coordinator, California Preservation Program and
User Services, Western States & Territories Preservation
Assistance Service*

Thomas F. R. Clareson

Director for New Initiatives, PALINET

Thomas H. Teper

*Associate University Librarian for Collections, University
of Illinois at Urbana-Champaign*

Introduction

Protection of cultural heritage collections from damage, or even complete destruction by disasters is a concept which is basic to cultural heritage stewardship worldwide, crossing geographic, cultural, and political borders.

In the fall of 2005 and 2006, preservation experts Julie Page, Tom Clareson, and Tom Teper had the opportunity to lead sessions on disaster planning for the Mortensen Center's "Thinking Outside the Borders" Leadership Institute.

In addition to discussing key issues in disaster preparedness, response, and recovery, Teper teamed with Page in 2005 and Clareson in 2006 to emphasize the importance of leadership during disasters. Frequently, libraries with established disaster plans and policies to guide their preservation programs are seen as leader or mentor institutions by other organizations in their cities, states, and countries.

Recently, the importance of disaster preparation for librarians and cultural heritage professionals has been highlighted by large-scale weather-related disasters such as hurricanes and tsunamis. Given the wide-spread evidence that climate change may magnify such events, preparation becomes increasingly critical to the survival of our cultural heritage. Developing written disaster plans, practicing those plans, and being able to mitigate disasters (taking steps to make the damage to people, collections, and buildings less severe or intense) is a way to help ensure the continuing operation of your

institution in the event of a disaster, even if there are staff changes or reorganizations between the time the plan was initially created and when it is needed.

While there are a wide variety of sample disaster plans and other planning tools available from organizations such as Heritage Preservation, the Northeast Document Conservation Center, and the Council of State Archivists, a plan which is customized to your building, collections, patrons, and staff is important to the continuing “health” of your institution.

However, having a disaster plan alone is not the complete answer. As the comprehensive “Heritage Health Index” survey of preservation practices pointed out, many institutions may have a disaster plan, but do not have personnel trained to carry out the plan. Regular practice of the plan, continuing training to keep up with the latest advances in disaster mitigation, and updating of the plan at least once a year will improve the chances of a successful response to both the smaller-scale emergencies often typified by leaks, pest infestations, and minor mold outbreaks and the larger community or regional disasters that may be sudden or accompany severe weather events.

Developing and Exercising Your Disaster Plan

In the first moments of an emergency, personal safety is the most important priority. When people and structures are determined to be secure, attention can turn to the overwhelming job of putting the library back in order. Success will depend upon how well the institution prepared. What does the response team do first? Who needs to be involved? How can responders avoid damaging materials while rescuing them? Can an emergency be prevented from happening in the first place?

The driving motivation behind disaster preparedness, including staff training, is that the better prepared the library and the more efficient its response, the more likely the recovery will be successful and the costs controlled. Times of emergency are a true test of leadership skills. Strong communication channels and well developed relationships with the support of a well-trained staff will get you through even the worst disaster. However, failing to have these skills developed and in place ahead of the flood, fire, or earthquake will hobble your response and can erode the position of a leader.

In addition to large scale natural disasters, library administration and staff should also be prepared to respond to the danger to collections from roof leaks, broken pipes, mold and pest infestations, fire, etc. Likewise, manmade threats from arson, terrorism, and electrical or water accidents are very real dangers to our cultural heritage collections. These events are international in nature and know no borders.

Emergency vs. Disaster

An emergency is an unanticipated or threatening event that requires immediate action. A disaster is a large-scale calamity that requires immediate action, but it can also start with an emergency that gets out of control. By preparing for emergencies thoroughly, institutions will be able to prevent most from becoming disasters! Library emergencies have the propensity for becoming disasters; therefore, the two words are often used interchangeably to encompass the broad aspects of planning and preparedness.

Paper-based collections are highly susceptible to damage from water and resulting mold. Especially when organic materials get wet, the clock starts ticking, and the deterioration

and mold will start to take hold in 48-72 hours or possibly even more quickly. Therefore, by focusing most of disaster preparedness, training, and supplies on water-related emergencies in which a prompt and effective response has a major impact on the survivability of the collections, preservation and conservation programs have been able to prevent many significant cultural losses. Additionally, it is important for librarians and archivists to understand that a high percentage of emergencies affecting libraries happen when construction is going on, in or around the library building. This is a time to take extra precautions against water incursion and to protect collections from becoming the victims of accidental fires.

Health & Safety First!

A basic premise that guides all emergency response actions is that the health and safety of people is being monitored – all personnel have been accounted for, injured are being cared for, and workers are protected during response and recovery activities. This includes library staff who may be involved in assessment of damage to collections or recovery of materials. Consider the building/collections guilty until proven innocent! A building that has been through a flood, fire or earthquake is not the same building it was before the disaster. Structural damage, contaminated water, and the release of asbestos from building materials are among the many very real threats following a disaster. It is important that response managers provide protective safety equipment for workers, and that responders never enter an unoccupied building alone. By implementing a buddy system and monitoring where crews are working, many unnecessary injuries can be avoided.

Developing Your Disaster Plan

Where should disaster preparedness activities start? A successful disaster plan and staff training program not only teaches people what to do, but also how to remain calm. When people understand their roles and responsibility during an emergency, things fall into place much faster. Emergency preparedness is not simply having a disaster plan or manual, but rather it is a combination of written documents, training, raising awareness, conducting drills, rewriting or clarifying based on those drills, and ongoing training. This preparation process is conducted within the library, the larger institution, and within the community or region.

Prevention

The efforts put toward preparedness should be as great as the resources allow, but they should include efforts to:

- Assign responsibility [see Appendix A: Responsibilities During a Disaster]
- Coordinate with agencies and institutional personnel
- Assess potential sources of emergencies and identify hazards
- Assess prevention and protection needs
- Evaluate collection assets and set priorities

Prioritizing collections will help responders to evaluate their protection needs as well as to guide a disaster response requiring salvage and treatment of collections. By identifying an

institution's highest priority assets, responders will not lose valuable time and resources saving low value items. [See Appendix B]

Preparation, Response, Recovery & Follow-through

The *preparation* process includes the actions taken for *when* or *just in case* disaster strikes. It provides the framework for response. *Response* is the implementation of the parts of the plan that are needed to meet the institution's needs in the event of a disaster. *Recovery* is what is done to get back to delivering materials and services. *Follow-through* includes distribution of the plan and those parts of the process that are ongoing to assure that disaster preparedness remains a priority for the library. These include staff training activities and establishing collaborative relationships between the institution/city/county and emergency managers and first responders (e.g., fire, police). Specific activities that may be undertaken as part of the preparation process may include:

- Preparing a first response action list
- Compiling up-to-date telephone list of staff and volunteers
- Identifying emergency funds and insurance coverage
- Purchasing and distributing in-house supplies
- Identifying sources of supplies, services and experts
- Writing an adequately specific Disaster Plan

Compiling Your Disaster Plan

A Disaster Plan needs to be tailored to an individual institution's facilities, staff, collections, formats, and available resource base. It needs to be 'adequately specific' to meet the needs of an institution – easy to use and update, as short and concise as possible, and adaptable to meet the response needs for the disasters most likely to strike an institution. It should include responding to both people emergencies (e.g., evacuation, bomb threat, fire) as well as to collections emergencies (e.g., collection priorities, how to salvage different types of materials). There are a number of good templates and online tools to help compile a plan. [See Appendix C: Disaster Plan Resources] By taking a phased approach in compiling the plan, setting realistic goals, and adopting a flexible timeline, the enormity of producing an effective plan becomes less overwhelming. Putting together a team representing staff from building facilities, systems, personnel, and collections ensures that key elements of the preparation and response activity are represented. And, providing a mechanism for keeping the plan up-to-date, especially those frequently changing elements such as names and phone numbers, ensures the ability to contact key members of the response team as well as their regular review of the material.

Exercising the Plan and Training Staff

The best written disaster plan and the most up-to-date phone list will be greatly compromised when disaster strikes *if* an institution's staff have not been trained on how to implement the plan and what steps to take in the immediate aftermath. Emergency response plans need 'exercise' similar to fire or evacuation drills in which everyone practices leaving the building. These drills teach personnel what to do, where to exit, and how to proceed in an orderly

manner. Drills, or 'exercises', of the disaster plan including response for collections damage, are critical for testing procedures, looking for problems, and discussing solutions. These exercises should *teach success*, not failure, and should *build confidence*, not apprehension, among the staff.

Tabletop exercises engage the administration, staff, and volunteers in the disaster preparedness process. The goal of exercising an institution's plan and training staff is to develop a cohesive team and maintain a current and up-to-date disaster preparedness plan. A good leader recognizes that a well-trained staff is an investment of time and resources that will greatly enhance the effectiveness of the library's emergency preparedness. A disaster plan can never be effective if it sits on the shelf and gathers dust! The plan is never really done – it needs to be looked at regularly and used even for minor emergencies.

Exercising the plan and training staff will greatly improve readiness in responding to disaster and provides essential insight to:

- Reveal planning weaknesses
- Identify resource gaps
- Improve coordination
- Clarify roles & responsibilities
- Improve individual performance & confidence
- Develop a cohesive emergency management team
- Provide input to revise & update plan

Two types of training that are especially effective for libraries are the Tabletop (Discussion) Exercise and Functional (Hands-on) Exercise:

Tabletop Exercise (Discussion)

A tabletop exercise helps to identify gaps in a plan. During such an exercise, the emergency management team is presented with a series of question-problems relating to a disaster.

Sample scenarios for Tabletop Exercises:

- *Library is the site of a protest by an angry mob*
- *An earthquake hits while the library is holding a public event*
- *A basement storing collections is filling with water and the electricity is still on*
- *A crazed person is shouting obscenities and begins splashing books with an unknown liquid*

A tabletop exercise provides an opportunity for members of the emergency management team to discuss actions based on a described disaster situation and practice coordinated problem solving for emergency situations. Such an exercise permits messages to be given to individual players that might shape their actions, permits breaks in the action for the team to discuss proper response activities, and encourages ongoing discussion and critique of the appropriateness of actions taken. Most importantly, it provides participants with an opportunity to

practice a coordinated response, provides input to revise and update the plan, and prepares participants for both a functional exercise and a real event. [See Appendix D]

Functional Exercise (Hands-on)

A functional exercise tests institutional response to a disaster scenario and focuses on a particular aspect of the plan, building area, or collection salvage. A fire drill is an example of a functional exercise. Such an exercise involves the emergency management team and relevant personnel; the group is presented with a hands-on training exercise relating to a disaster. A functional exercise breaks the plan up into manageable training opportunities. The intent of such an exercise is to train staff in prevention & safety, teach collection salvage techniques for priority collections, develop an understanding of the plan and its implementation at every level of the institution, and provide input to revise and update the plan.

Keys to a Successful Exercise

Preparing and running a successful exercise depends upon eight key factors.

- *Administrative support.* Administrators must not only support the exercise, they must participate in an administrative exercise as well as a broader exercise that includes staff from throughout the institution.
- *Good design.* In addition to administrative support, the exercise requires good design and facilitation. Public Safety Officers or Training Officers with the skills to facilitate such exercises are often instrumental in their success.
- *Good environment.* The facilitator must focus on creating a positive learning environment with clear objectives.
- *Realistic scenario.* The scenario should not overwhelm the participants. Each exercise can be progressively more difficult, but the first exercise should be manageable.
- *Preparation.* An exercise should not be attempted until after a disaster plan has been distributed, discussed, and revised to include staff feedback. Otherwise it will be too frustrating and too many problems will be brought up.
- *Clear instructions.* Provide all participants with the scenario, prepare them by reminding the participants how long the scenario will last, and outline the format prior to beginning.
- *Critique.* Make sure everyone participates. Watch for non-participation and try to determine why (is the person being thoughtful and taking their time before responding, but the rest of the group is going too fast; someone is dominating the exercise and others can't get a word in; or a person is overwhelmed).
- *Follow-up.* Distribute an Action List after the exercise, with assignments and time frame for completing. Make a list of what went well, such as, collection priorities were clear and up-to-date and there was agreement on what to salvage first.

As you proceed through more advanced exercises, remember three things. First, they should be realistic. Second, they should be challenging. Finally, they should last long enough for

the full response to be evaluated and carefully documented. The drill should be instructive and educational, encouraging confidence in the staff and contributing to the sense of an organized response.

The work really begins in the fine-tuning, revision, and maintenance of the plan. Through observation, it will become apparent that many aspects of the exercise will require improvement. Remember, an exercise should be planned to take a minimum of two hours – one hour for the exercise and one hour for debriefing and discussion. Staff members assigned to observe and evaluate the drill, a recorder charged with writing down everything said or an audio-visual recording of the session will help in reviewing the exercise. In the end, it is most important to remember that drills should teach success, not failure. They should build confidence, not apprehension.

Emergency Event Debriefing

An event debriefing should always take place after a real emergency has been brought under control. Such a debriefing can also be used as a training tool after a Tabletop or Functional Exercise. Every event is an ‘unplanned exercise’, so emergency management teams should not lose the opportunity to learn from each experience. The following objectives and guidelines for a meeting of all participants following a real event can be helpful in making the most of the disaster:

Objectives

- Gather complete and accurate information about the incident
- Objectively assess the emergency response and what aspects to look for areas of improvement
- Recognize the incident stress by allowing participants to share their personal reactions to the event

Information Gathering

- Describe the source or cause of the emergency
- Give the chronology of the event:
 - Discovery
 - Early response
 - Organization
 - Full response
 - Aftermath measures
- Name all the people involved in each phase
- List the actions in each phase
- Describe the outcome of the event

- List the order of activities now required to bring the institution back to normal operations

Assessment of Response

- Were all phases of the event handled in a timely manner?
- Were communications adequate throughout the event?
- Was the response well organized?
- Were staff resources adequate?
- Were emergency supplies adequate?
- Was there any confusion during any phase?
- What problems arose that were not adequately dealt with?
- How can the plan and response be refined to function better?

The Human Factor

- Was anyone injured?
- Did people get adequate rest and necessary refreshments?
- Does everyone understand exactly what happened?
- Was anyone frightened or angry?
- Does anyone feel guilty or anxious?
- Are family members supportive?

Based upon evidence gathered after a disaster, adjustments to an institution's disaster plan and future training activities can make a significant difference in the future. By keeping an 'Emergency Event History' as part of an institution's disaster plan, the emergency management team will better evaluate risks and vulnerabilities. Remember, what has happened before where the cause has not been mitigated, is more likely to happen again.

Short Group Exercises:

On adhesive slips, write down two leadership actions you can take to improve your library's emergency preparedness

Write down events that have occurred in your library, your immediate area, and your region. Make sure your disaster plan and staff training addresses these events.

Leadership in the Face of Disaster

There are a multitude of decision-making and administrative support issues when faced with a disaster. A good leader recognizes that full administrative buy-in for disaster preparedness activities are critical. Preparedness makes good sense, as it:

- Minimizes damage
- Expedites response and recovery
- Saves time, trouble and expense

- Replaces chaos with thoughtful response and recovery
- Allows for prompt resumption of service

A leader must also watch out for ‘stumbling blocks’ that present themselves during response and recovery operations. Recognizing these potential issues and talking about them ahead of time in the administrative group is the first step to avoiding them:

- Poor management
- Poor communication and updates
- Poor stress management
- Lack of clarity in decision-making framework
- Lack of flexibility to the ever changing events
- Working in isolation, failing to use team approach
- Overly ambitious in what you think you can do
- Lack of inventories or priorities
- No practice using exercises and providing staff training
- Failing to harness the goodwill and funding opportunities the event provides

If there is a reluctance to prepare on the part of the staff and administration, focus on what the library has already done to prepare (e.g., fire drills, emergency exit maps, family preparedness). Point out how unacceptable the alternatives are – permanent losses, chaos and accountability. You need to be able to get back into the ‘business’ of serving your public.

Conclusion

The assessment of risks and development and practice of plans to protect an institution’s treasures from disaster remain among the most important activities that can be undertaken in any institution. The importance of protecting cultural resources from damage and loss transcends borders, languages, and time. Many of the treasures held by libraries and other cultural institutions have served students and scholars for decades – even centuries – and their continued benefit to the academic and cultural spheres they serve is dependent upon their effective stewardship by professionals dedicated to their protection. The opportunity for institutions to build leadership activities around the protection of such cultural resources serves the purposes of supporting team building activities, enhancing the leadership capabilities of personnel, and sustaining the richness of our shared cultural heritage.

Before Disaster Strikes: Ten Things You Need to Know*

Overarching priorities: Human life & safety and Protection of library's assets

1. Have a communication plan
2. Prepare a first response action list
3. Organize emergency contact information for all staff & volunteers
4. Prepare a disaster plan that covers people & collections
5. Train staff to respond to the most likely emergencies
6. Understand your insurance coverage
7. Survey your building for risks
8. Establish salvage priorities for collections, files & equipment
9. Disaster supplies and services/supplies list as part of plan
10. Establish collaborative relationships

*Before Disaster Strikes, November 2006 – Produced by Julie Page, CPP, for the Infopeople Project infopeople.org. The Infopeople Project and the California Preservation Program <http://calpreservation.org> are projects of the California State Library, supported by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act, administered in California by the State Librarian. Download handouts and view archived webcast at: http://infopeople.org/training/webcasts/webcast_data/196/index.html

Notes

For additional discussion of disaster preparedness, see: Julie A. Page “When Disaster Strikes: First Steps in Disaster Preparedness.” Co-published simultaneously in *The Serials Librarian*, v. 36, no. 3/4, 1999, pp. 347-361; and in *Head in the Clouds, Feet on the Ground: Serials Vision and Common Sense*, ed. By Jeffrey S. Bullington, Beatrice L Caraway, and Beverly Geer, Haworth Press, 1999, pp. 347-361.

For international discussion of disaster preparedness and planning, see the IFLA (International Federation of Library Associations and Institutions) publications available on the IFLA Web site, including: *International Preservation News – A Newsletter of the IFLA Core Activity on Preservation and Conservation*, No. 34, December 2004 including: “Library Experiences with Natural Disasters: Hurricanes and Volcanoes (Montserrat)” by Gracelyn Cassell; “Skills Development and Management for Disaster Mitigation Planning: the Specific Case of Electronic Equipment and Digital Data” by Jo-Ann Georges; “Risks Associated with Hurricanes in the Caribbean” by Steve Pollanais; and “Survey on Disaster Planning in National Libraries” by Marie-Thérèse Variamoff and Marie-France Plassard and *A Blue Shield for the Protection of our Endangered Cultural Heritage: Proceedings of the Open Session* co-organized by PAC (Preservation and Conservation) Core Activity and the Section on National Libraries, translated and edited by Corrine Koch, International Preservation Issues, Number Four.

Appendix A

Responsibilities During a Disaster Response & Recovery

Identify and list at least one person and an alternate for each responsibility. A group or committee may be responsible.

Assessment & Documentation	Name & Contact Information
Assesses and estimates the type and extent of the damage	
Contacts insurance company or risk management and fills out required forms	
Ensures proper documentation of damage (photos, videos, etc.)	
Reviews collections priorities list and confirms or adjusts it based upon damage assessment	
Estimates number of personnel needed to complete the work & how long recovery will take	
Evaluates & recommends if salvage can be done in house with staff, or if a consultant and/or emergency recovery services are needed	
Identifies locations for storing materials out of building if a commercial recovery service is not used	
Formulates logistics for packing out and moving materials from the building if a commercial disaster recovery service is not used	
Records all major decisions and a chronology of events	

Communications	
Handles all public relations & the media	
Interacts with the organization to which the Library reports.	
Collections Salvage	
Deploys work teams	
Supervises work teams in proper packing and personal safety	
Keeps inventory control of items being removed or discarded	
Security	
Secures and protects the building's contents	
Supplies and Equipment	
Responsible for ordering, delivery and dispersal of sufficient quantities of the appropriate materials for packing out	
Responsible for ordering, delivery and dispersal of sufficient quantities of food, water and other comfort items for the workers	
Financial Issues	
Tracks the monetary impact of all decisions	
Arranges for funds necessary to buy supplies, equipment, food, etc.	

Building Issues	
All issues leading up to the eventual restoration of the building to normal	
Identification of locations for response and salvage activities	
Personnel Issues	
Provides communications with staff	
Responsible for union issues	
Handles health, safety and comfort (physical and emotional) concerns	
Coordinates and monitors the use of volunteers	

Appendix B

Guidelines for Establishing Salvage Priorities

The collection priorities list is meant to be a guide. Consider the circumstances and limiting factors (access to materials, extent of damage, time, availability of resources, etc.) that may require deviations from the plan.

Priority for pack-out and salvage should be given to those records and collections that have information needed to establish or continue operations after a disaster; aid the recovery operations; and assist in fulfilling the requirements of the insurance company in order to file a claim. It is important to have some idea ahead of time which collections should be recovered first.

In disasters where only a small amount of material has been affected it is possible to review the material item by item for recovery or discarding. Usually there is not enough time to do this review during a large pack-out. Once the material is frozen it can be reviewed at a more leisurely pace.

Don't try to prioritize item by item; do it by groups of materials. These are decisions that will be highly individual to each institution, but listed below are some guidelines that may aid in making those decisions.

- High priority should be given to the bibliographic records of the collection. For many libraries this is the shelf list, the card catalog, and inventories if not also available electronically. There should be regular backup of computer storage devices (disks, tapes, etc.) with the backup stored off-site.
- Give high priority to staff and personnel records necessary to continue payroll and operations, if not duplicated elsewhere. It is strongly recommended that these records be duplicated and stored off-site to prevent their irretrievable loss.

When prioritizing collections, consider the following questions:

- Can the items be replaced?
- Would the cost of replacement be more or less than the cost of restoring the material? (Replacement cost should include ordering, cataloging, etc. in addition to the purchase price.)
- How difficult is the material to replace? (Special collections, archives, and foreign publications can be irreplaceable. Some items are replaceable but very costly.)
- Does the material have a high or low collection priority? Where is your emphasis in collecting?
- How would loss of the items impact the institution's mission?
- Will the items require immediate attention because of their composition (coated paper, vellum, water-soluble inks)?

Priority 1 items are packed out first unless they are NOT in danger, or if it is impossible/dangerous to access them. Priority 2 items are salvaged next, etc. All other materials are saved if possible, time and conditions permitting.

Make a list of Collection Salvage Priorities and mark them on the floor maps. Make sure high priority collections are known and understood by the salvage teams and local fire department.

Appendix C

Disaster Preparedness and Response Resources

Web Resources

California Preservation Program

Provides preservation related resources for libraries and other cultural institutions in California. The Emergency Planning & Response section includes a Pocket Response Plan (PReP), Template Disaster Plan, Disaster Exercise, and links to resources.

Conservation Center for Art and Historic Artifacts (CCAHA)

Technical bulletins address disaster recovery topics with pdf downloads: Disaster Recovery: Salvaging Books; Salvaging Art on Paper; Salvaging Photograph Collections.

CoOL Conservation OnLine

“A project of the Preservation Dept. of Stanford University Libraries, is a full text library of conservation information ... of interest to those involved with the conservation of library, archives, and museum materials.”

Disaster Preparedness and Response is one of the conservation topics that includes a wealth of information linking to organizations (e.g., Library of Congress, Northeast Document Conservation Center, SOLINET), disaster plans, and a broad spectrum of other disaster/emergency resources. It is the best place to start because it is so comprehensive. Disaster Preparedness and Response runs over 6 printed pages and is continually being added to and updated by Walter Henry. Don't be overwhelmed! Many resources can be linked to or printed directly from CoOL for use in your own disaster plans. Scan the disaster plans of other institutions similar to your own.

Council of State Archivists (CoSA)

CoSA's Emergency Preparedness Initiative, including the Pocket Response Plan™ (PReP™)

Disaster Mitigation Planning Assistance

The database allows you to search by state, multiple states, nationally and by type of service, supply or expert. Results can be downloaded into Excel for easy updating of your institution's disaster plan.

Library of Congress

Emergency Preparedness resources, including Family Treasures – Preserving Treasures After the Disaster and Insurance/Risk Management with its “General Collections Valuation” and insurance companies.

National Park Service

Excellent resource, especially for artifacts. Search “Museum Handbook” for Part I, Chapter 10 on Emergency Planning; “Conserve O Gram” #21 on Disaster Response & Recovery; and “Wet Collection Recovery.”

Northeast Document Conservation Center (NEDCC)

General preservation Web site with a Disaster Assistance section and links to its Emergency Management Technical Leaflets, including “Emergency Salvage of Wet Books and Records”

and “Emergency Salvage of Wet Photographs.” Provides dPlan™: The Online Disaster-Planning Tool, a free disaster plan template.

Western States & Territories Preservation Assistance Service

Participating states and territories: Alaska, American Samoa, California, Colorado, Guam, Hawai'i, Idaho, Montana, Nevada, Northern Marianas Islands, Oregon, Utah, Washington, and Wyoming. Provides 24/7 disaster assistance number 888-905-7737 for help in the event of a collection disaster.

Appendices and PReP template are available online.

Print And Video Resources

Breighner, Mary. *Risk and Insurance Management Manual for Libraries*. ALA, 2005.

Resource to guide best course in selection for protection of assets for libraries and to gain an essential understanding of risk management in preventing losses. Includes sample policies and checklists.

Building an Emergency Plan: A Guide for Museums and Other Cultural Institutions. Compiled by Valerie Dorge & Sharon L. Jones. Getty Conservation Institute, 1999.

A free download is available at the Getty Web site. Museum focus, but provides excellent planning and implementation information for all cultural institutions. Takes a unique approach by including “Questions to Consider” and “Suggested Exercises” focusing on testing your plan. Gives many examples for tabletops and other exercises.

Emergency Response and Salvage Wheel and Field Guide to Emergency Response

The Wheel is a user friendly slide chart providing quick access to essential information on protecting and salvaging collections. Text of the Wheel is available at the Federal Emergency Management Agency Web site. The Field Guide and its accompanying DVD provide clear, practical advice to help you with initial response and salvage steps. This authoritative, hands-on advice was developed by conservation professionals for staff at museums, libraries, and archives. For order information go to the Heritage Preservation Web site.

Halsted, Deborah D., Richard P. Jasper & Felicia M. Little. *Disaster Planning:*

How-to-do-it Manual for Librarians with Planning Templates on CD-Rom. Neal-Schuman, 2005. Comprehensive resource guide for all types of libraries, including case studies, web resources, quick guides, checklists, forms, and a wide variety of planning tools.

It's Academic: Emergency Preparedness for Schools [videorecording]

Sacramento: Governor's Office of Emergency Services, 1995. VHS, 15 min. sd., col.

Adapted from a longer program entitled “Academic Aftershocks” which covers in greater detail the California State University Northridge 1994 earthquake experiences. Shows damage caused by and institutional response to the earthquake. Search “Videos and Publications” on the Web site.

Kahn, Miriam B. *Disaster Response and Planning for Libraries*. 2nd ed. ALA, 2003.

Comprehensive resource guide for all types of libraries, updated to include terrorist and other case studies. Includes extensive checklists, forms, contracts for vendors and supplies, and a list of resources.

Kahn, Miriam B. *Protecting Your Library's Digital Sources*. ALA, 2004.

An e-preservation resource for librarians, preservationists, archivists and records managers who create and maintain electronic records. Includes extensive checklists and forms.

Thenell, Jan. *The Library's Crisis Communications Planner: A PR Guide to Handling Every Emergency*. ALA, 2004.

Communications basics in this step-by-step guide, for communicating to critical contacts in times of crisis.

Wellheiser, Johanna G. & Jude Scott. *An Ounce of Prevention: Integrated Disaster Planning for Archives, Libraries and Record Centres*. 2nd ed. Scarecrow, 2002.

Canadian publication that presents a broad-based approach to “integrated” disaster planning applicable to U.S. institutions. Detailed appendix of resources and extensive reference and index.

Appendix D

Leadership Institute – Tabletop Exercise

Instructions: The leader of this tabletop exercise assigns team members roles as outlined in the section headed “Thursday Night, 7 p.m.” and begins by presenting the team with the scenario outlined in that section. From that point on, the team is asked to document how they would respond to the situation with a maximum of fifteen minutes before being presented with the next step in the scenario by the team leader. As the exercise wraps up, the leader and response team can discuss the progress made in responding to the disaster.

Section 1: Thursday night, 7 p.m.

It is the last week of September and 75 patrons and a staff of 5 are inside the Mortenson Public Library. In addition, there are 45 people attending the Friends of the Library lecture. A storm with gale-force winds and heavy rainfall has intensified in the last hour. Several staff have been discussing whether or not to close the library early (normally open until 9:00 p.m.), but are worried about sending everyone out into the bad weather. There are reports that a river next to the library is rising, with the possibility that it will overflow its banks.

Please each assume the role of one of the library staff on site, and put on your name tag:

- Library Director – Attending the lecture
- Reference Librarian – Working on the Reference Desk
- Circulation Manager – Night manager for the library
- Library Security Guard – Stationed at the Circulation Desk
- Library Page – Circulation Desk and shelving

The Mortenson Library has two stories and a basement; no fire sprinklers but has fire detection and an elevator. All staff are working on the 1st floor, except the Library Page who is on the 2nd floor. The Friends are in the Meeting Room on the 1st floor.

Discuss the issues around closing the library early and sending people out into the storm.

Section 2: Thursday night, 7:30 p.m.

A patron comes to the desk and says that two windows on the second floor have broken, and wind-driven rain is coming in onto the book stacks and two computer terminals.

Discuss what should be done to secure the building and protect the collections.

Section 3: Thursday night, 8:00 p.m.

The Library Page slips on the water and appears to have broken her ankle. Water has shorted out the alarm system, and the alarm is blaring. In order to turn off the alarm, the detection system will have to be disabled. An elderly member of the Friends group is complaining of chest pains. More people are entering the Library as they abandon their cars. The Emergency Broadcasting System is saying that everyone should stay inside and off the streets.

Discuss what should be done regarding health, safety, and building issues.

Section 4: Thursday night, 8:30 p.m.

The storm is intensifying. Three more windows break on the 2nd floor when a tree falls and branches go through the windows. Wind-driven rain is blowing into the stacks and floor. Water is starting down the stairwells. The power goes out and emergency lighting comes on. Elevators are unusable. There is minimal lighting in the stacks. The Library has ten 100ft. x 20ft. rolls of plastic sheeting. The Library has a telephone tree for staff, but no disaster response team. The Reference Librarian who best knows the collection and lives 45 minutes away wants to go home.

Discuss the people issues. Will the library stay open after 9:00 p.m.? What happens when critical staff want to leave? What should be done about the damaged books and computers between now and Friday morning?

Section 5: Friday morning, 7:00 a.m.

The storm has subsided but the river has overflowed its banks. The building has been secured – windows boarded up, floors dried, electricity restored, but elevators are out due to water in the machinery. The Mortenson Library has a disaster plan but the section on collection priorities and collection salvage has not been written. The Library has 50 flattened cardboard boxes and 10 rolls of tape.

Discuss how you are going to assess water damage to the collection. When you have decided, go to the next card for the number and location of damaged materials.

There are 144 shelves of art and music books damp or wet on the 2nd floor. There are 48 shelves of literature books and 68 shelves of history books damp or wet on the 2nd floor.

Decide what you are going to do with the books. Estimate the number of wet books based on 30 books per shelf. Are you going to pack them out? Air-dry? Throw away? Other?

What staffing and supplies would be needed to pack out the books, and how are you going to get the supplies? You can put 10 books per box, and one person can pack 100 books per hour.

Section 6: Friday morning, 9:00 a.m.

It is time for the library to open and patrons and staff are at the front door. A local TV station has arrived to take pictures of the tree with its branches through the library windows. Someone just discovered ten boxes of new books in the basement receiving area. The boxes were sitting on the floor and are soaked. There are pools of water throughout the processing areas in the basement.

Discuss the issues around opening the library and how to handle the media. What are you going to do about the water in the basement and the wet books?

If time:

Make a list of the issues you feel still need to be addressed.



“All of us as librarians, library educators, administrators, and workers are charged to take a leadership role, by those in our past, present, and future - those that have fought for civil rights and human rights - in South Africa, in the USA, and around the world.”

A Space, a Place and a Time: Locating One’s Self in a Multicultural World

Ujala Satgoor

Deputy Director, Specialist Units Department of Library Services. University of Pretoria

Sandra Ríos Balderrama, USA, RiosBalderrama Consulting

Introduction

When working internationally, opportunities and linkages abound when you least expect it, reinforcing the idea and the hope that indeed, we are connected, even across the miles and perhaps more deeply than virtual communications allow for. We first met each other as presenters at the American Library Association International Relations Round Table (IRRT) preconference in June 2006, in New Orleans, Louisiana, USA at the invitation of Chair of the IRRT, Susan Schnuer, Associate Director at the Mortenson Center. Susan had worked individually with both of us, was wise enough to create a new linkage, and had the insight to inform us that our presentations complemented one another. Although they differed in style and content, they demonstrated the deep commitment that many South African and United States librarians share in order to strive for equity and to promote the acknowledgement and acceptance of diversity, in the context of our nations’ distinct histories, norms, and values. All of us as librarians, library educators, administrators, and workers are charged to take a leadership role, by those in our past, present, and future - those that have fought for civil rights and human rights - in South Africa, in the United States, and around the world. We are obligated, then, to be tenacious and persistent about working through what it means and what it looks like to co-exist, to mutually respect, to reciprocate, to go beyond tolerance, and to ultimately co-create libraries and library services that are welcoming and reflective of the multicultural world that exists today.

Susan invited us to create a joint presentation for the Thinking Outside the Borders leadership institute to be held in November 2006, in Allerton Park, Illinois. We had four months to work via e-mail and were able to meet the night before our joint presentation. It was a meeting that went late into the night and included our own process of international relations, i.e. exchanging, learning, and asking questions.

Ujala's and Sandra's International Conversation the Night Before

Sandra: Ujala, What do you mean when you say...?

Ujala: Sandra, it is different in South Africa in this way...

Sandra: Our work in libraries in the USA parallels what you are doing...

Ujala and Sandra: Inclusiveness takes time and new strategies.

Ujala: Why do you have "ethnic caucuses"? In South Africa, having been separated on the basis of colour, even at an organized level, we want to have "one" inclusive library association?

Sandra: As a result of exclusion, many 'librarians of color' created parallel associations that now work "with" the major associations.

Ujala and Sandra: Hmm, inclusive but excluding and excluded but now inclusive! Different circumstances, different understanding...

A pause.

Ujala and Sandra: Timing. History. Context. Make a difference.

Sandra: Ujala, tell me about "Ubuntu."

Ujala: "Umuntu ngumuntu ngabantu - I am a person through other human beings."

Sandra and Ujala: Our concerns are the same and our strategies may have differed but we share a universal dream - one that transcends borders of any kind.

Librarianship is practiced according to the same international principles with which we are all familiar. However the support, management and governance of libraries differ in countries. The country presentations enable the participants to experience, through the presenters, the status and support of libraries in the countries they represent. It becomes a rallying point for common problems and challenges, as well as the opportunity to share and learn. After delivering our individual country presentations, namely, "Developing an Informed Nation: Challenges and Opportunities for South African LIS Leadership" and "Diversity and Multiculturalism in USA Libraries," we began our joint session, entitled "Perspectives on Multiculturalism and Diversity in Libraries." After two days of both absorption of and engagement with the Thinking Outside the Borders curricula, we asked the participants to take a collective pause and to reflect on "Why are we here?" It was important for us to elicit the level of awareness and/or understanding of these concepts and the openness and commitment to work differently.

These answers were recorded on easel sheets for all to view.

Why Are We Here?

- To increase our consciousness of change
- To think more non-Eurocentric
- To get ideas from all here and take back a full suitcase
- To network with agents of change
- Because we are lucky
- Because it is mandatory
- To think outside the borders
- To change our mind-set

We welcomed the honesty and diversity of responses as a result of informal questioning and brainstorming.

A Space, a Place, and a Time

All of us involved with the Thinking Outside the Borders institutes had been given a space, a place, and a time, to delve deeply into the topics of global libraries and global leadership. Soon, however, the space would belong to other hosts and other guests. The time for gathering face-to-face would come to an end. Soon, we all would be returning to our respective homelands, countries, states, families, friends, and familiarities. Thus, it was important to discuss not only what is easiest to share – our universal and common concerns – but the differences that enhance

our learning and increase our competence, differences based on our own national, cultural, family, spiritual values and norms. An effective global leader must be challenged yet capable of facilitating outcomes and visions that involve differences in world views.

We took a look at “difference” by taking note of two of the leadership characteristics and values offered by other presenters throughout the institutes: self-reflection and self-assessment. In asking the participants “What does it mean to be a global leader?” – we included exercises that allowed participants to first locate themselves within their own worldview and their own capacity for communicating cross-culturally. The exercises were meant to engage people with each other as a full group (40 people), small work groups (3-6), dyads (2), and as individuals interacting with themselves, using journals, index cards, post-its, and survey/questionnaire instruments. These various groupings allowed for participants to practice interacting in the large groups and small groups, both intimately and publicly, and to practice reflecting as individuals. Use of the exercises was intended to help the group look outside their own borders, begin to be nudged out of them, and to expand them. We concluded the session with a visualization exercise that allowed us to move beyond borders completely and into the transformative realm, transcending our own mental borders.

With these exercises, participants had to take risks in order to exchange, learn, teach, disagree, and pull the collective wisdom together. Those that felt free to talk without holding up their hand to be recognized or those that were used to spouting out opinions and assumptions quickly, had to consider holding back and listening more. Those that felt hesitant because they were more introverted, comfortable with raising their hand to speak, or maybe uncomfortable with English (in this case the host language) fluency, had to consider speaking up more frequently, quickly, and sometimes in the home or native language. As Thinking Outside the Borders leaders, the whole group had to take responsibility for seeking to understand and/or facilitate the understanding of each colleague’s meaning and intent while speaking.

This module will take you through the exercises. The participants sat at round tables with 6-8 people at each table. The round tables provided an atmosphere conducive to group discussion, as well as breaking off into partnerships of two, or smaller groups of three. We were lucky enough to have breakaway rooms or common areas to move into, if necessary, including outdoors. The number of facilitators, scribes, and supplies that are recommended in this module are for a group of 45 participants. In our case, participants represented 9 countries and we shared the role of facilitator and scribe. We have shared, here, a few of the brainstorming and recording results in the side-boxes of this publication in order to give you an idea of participants' reflections and processing. We ask you to keep in mind, as you read them that the comments are made in the context of serious reflection, deep assessment, purposeful sharing with the intent of learning, and finally to practice courage to discuss not only how we are the same but how we are different. The final exercise, in our minds, returned us to a universally shared space, place, and time.

Module Overview

Part 1 Locating Yourself in a Multicultural Environment - Brainstorming, dyads, and group work

Part 2 Multiculturalism in the Workplace - Journaling and group work

Part 3 Our Life World View - Self-assessment and reflection, filling out questionnaires and full group discussion

Part 4 Taking the Lead - Small group work, dyads, full group discussion

Part 5 Global Leadership - Visioning, brainstorming and full group discussion

(Refer also to Appendix A)

Part 1: Locating Yourself In A Multicultural Environment

Brainstorming, Dyads, and Group Work

Identify Cultural Groups and/or Languages and Traditions:

1. In your country
2. In your workplace - co-workers and colleagues
3. Among your clientele, your users, your patrons

The purpose of this exercise is to take notice of:

- a) The diversity within each participant's country
- b) To demonstrate that diversity and multiculturalism are worldwide. We find diversity and multiculturalism in countries where we may least expect to find it because we know so little of the depth and complexities of one another's national demographics.

What You Will Need:

2-3 Easels with easel pads (flip charts) and markers in colors that can be seen by the full group (black, dark blue, dark green, red are suggested colors)

Masking or scotch tape to display easel pad sheets or you may have the easel pads that have sheets with “sticky tape” on the back.

1-2 Recorders/scribes

1-2 Facilitators

1 timekeeper

Timeframe:

1. In Your Country:

Allow 3 minutes per country for brainstorming

2. In Your Workplace:

Allow a dyad (2 people) to discuss diversity in their workplace for about 10 and 20 minutes (depending on the time you have available.) Each participant in the dyad should have half of that allotted time as each practices both speaking and listening, making sure that each is heard when the time is up.

3. Among Your Clientele:

Allow 10-15 minutes as a group or 10-20 minutes for dyad work with a return to the larger group.

A few cultural groups identified in three countries during one of the institutes:

MEXICO:

Mayas	Tarahumaras	Chinese
Koreans	Lebanese	Tsotsiles
Huicholes	Africans	Spanish

UNITED STATES:

Latinos	African Americans	Polish
Native Americans	Frontier People (on the Borderlands)	
Appalachians	Irish	Amish
Jewish	Arabs	Mormons
Navajo		

SOUTH AFRICA:

Zulu	Xhosa	Pedi
Ndebele	Indian	Afrikaner
Malay	English	

Process

During the “In Your Country” part of this session, participants from each country have 3 minutes to reflect on their answers and report them. At least 2 scribes are needed to write down the contributions on easel pads for the group to see. At our institute, the total group size was about 45 people from 9 countries. We acted as both scribes and facilitators. If our spelling was incorrect, we kept writing quickly to ensure that everyone’s thought was at least documented and we checked the spelling later. The momentum of the group’s participation was the priority. The group was aware that the written list of groups only provided a peek into each country’s diversity and did not represent the totality of diversity within the country. When we got to the last of the 9 countries, there was a concern by the group about “repeating” cultural groups that had already appeared in other countries’ lists. This should not be a concern. Many of us come from a history of diaspora, immigration, emigration, and migration, and we will find many ethnic/cultural groups worldwide. It is a natural group tendency, however, to not want “to repeat” and some participants began to highlight groups that they thought might be “distinctive” to their countries.

Identify Cultural Groups Amongst Your Clientele

There are class differences
The educated and un-educated
“The poor”
People that live “on the street”
Teenagers
Single mothers
The illiterate
People with disabilities
People that are indigenous to our country but that may not speak or read in our national language

The energy during this part of the session was vibrant and contagious, especially since it was following the World Soccer Cup of 2006. Every time either one of us called out the next country to “report out” their cultural groups, participants were eager to represent their country with pride.

The purpose of both the “In Your Workplace” and “Among Your clientele” components of this session is to reflect on what this diversity means to us as librarians in terms

of who we work with and who we provide services to and design services with. In the workplace, library organizations, and in traditional library service areas, diversity is sometimes not as evident, obvious or visible. For this reason it is practical to approach these two parts of the exercise in dyads (twos), triads (threes) or small groups, for 10-20 minutes, to allow participants more time to exchange more detail and context about their library as a workplace and about their library services. At the end of the time given, people may return to the larger group, share their answers and pieces of their discussions, and offer up questions. A facilitator is available to lead the discussion.

With the library organization or region of the country, city, or village being described, along with cultural or ethnic groups, the observation of diversity becomes more complex, as it should. The dialogue begins to focus on not only who the library currently serves but who they may choose not to serve under the current mission as well as who they could potentially serve in the near future.

Part 2: Multiculturalism in the Workplace

Personal Journaling and Group Discussion

Identifying Qualities, Behaviours, Attitudes and Language by Colleagues, Patrons, Students, and Clients:

1. What are the behaviors that annoy you or upset you?
2. What are the behaviours that you value?

What Annoys You

- Changing languages when others come in, to purposely exclude them
- Religious decorations on staff doors and cubicles
- Patrons from a different country that only ask reference questions of my male colleagues
- People who dominate conversations and don't let others speak
- Parents that let their small children crawl on the carpet in front of our circulation desk rather than watching them
- Cultures that make noise when they drink tea or coffee
- Asking a minority to speak for their group or all minorities
- When a colleague tells you all the time that you speak with an accent
- Groups who speak loudly to each other no matter where they are
- People that are given preferential treatment by virtue of their color

After identifying the diversity within our national and work environments we begin to take a closer look at how we live with this diversity and how we work with it and within it. It is natural that we will bump up against cultural traditions or values that we do not understand or that jolt our senses. We are used to living and working around people that have been conditioned and socialized with the same values and norms as ourselves.

What You Will Need:

4 Easels with easel pads (flip charts) and markers in colors that can be seen by the full group (black, blue, dark green, red are the suggested colors)

2 easels are labeled "What Annoys You"

2 easels are labeled "What You Value"

Small Post-it Pads but that are large enough to write a sentence or two and that have sticky glue for participants to post and display.

1-2 Facilitators/Readers

1 timekeeper

Timeframe:

Identifying What Annoys You:

15 minutes

Identifying What You Value:

15 minutes

Group Discussion

15 minutes

In this exercise participants were to reflect on and answer both questions, one at a time and separately. First, we ask them to take personal, individual time to reflect on moments

What You Value

- A smile on the face when someone approaches me
- Abrazos (Hugs)
- Being consulted on issues that impact me
- I love people who say “Thank you”
- Making an effort to pronounce my name correctly
- Asking questions about my heritage when genuinely interested
- People who are multilingual or at least comfortable with being around other languages being spoken
- Eye contact
- One foot (.3048 meters, 30.48 centimeters) of personal space
- Patrons who wait their turn and don’t interrupt others
- When people do not assume that I am married or heterosexual
- Understand that we aren’t alike but that we try to adapt to one another

in which they felt confused, annoyed, unwelcome, uncomfortable, or even angry – at an interaction with a library user or a colleague that appeared to be different. The participants were to write down on their post-its, 1-3 responses. They did not add their names to their responses (anonymity was emphasized so that participants did not feel constrained). They took 15 minutes for “What Annoys You”. When all participants were finished they walked up to the appropriately labeled easel pad and placed their sticky note on it. After everyone had posted their responses we addressed the next question: “What You Value”. Here, we asked them to think about interactions in which they felt welcomed, comfortable, at ease, “in sync”, or understood. After taking 15 minutes to write 1-3 responses, the group again added their post-its to the flipchart with the corresponding heading. (We strongly suggest a break at this point in the session.) Following the break, we as facilitators alternately read from each flipchart. One of us would read an “annoying behaviour” aloud and then the other of us would read a “valued behavior” and so on.

The participants as a group are asked to listen without judgment and only self-observation of their own reactions. We asked them to acknowledge their sense of agreement, recognition, or confusion.

Sometimes, a participant may see himself or herself at either end of the encounters described. What might be annoying or repulsive to one person is totally “normal” for another. On one day a person may be the one who facilitates cultural understanding and the next day the same person may contribute to a misappropriation of their cultural values upon someone else. How do we bridge these differences in values?

What do we do if we are interacting with a culture that does not always smile or make eye contact in a business interaction? What if the comfort level with personal space is closer or farther?

Cross-cultural competence begins with awareness and moves into increased knowledge and then experience. With these first two exercises we have begun to stimulate our awareness of our own biases, preferences, and prejudices. This is where we start. Then, we must realize

that if one is a leader that is truly interested in effective international and multicultural interactions, one will learn more about other cultural values and behaviors and learn that the differences are neutral not hierarchical or, in other words, one person's value is not better than another's, just different. As we educate ourselves through awareness, knowledge, and cross-cultural, multicultural, and global experiences we increase our competence for not only tolerating difference but respecting difference and being willing to reciprocate and exchange ideas and strategies at the level of the shared vision. Part 3 also focuses on assessment, but from a different angle.

Part 3: Our Life World View

Personal Assessment with Worksheet Tools and Group Discussion

- How We Develop and Respond to Different World Views Worksheet
- Assessing My Life Experiences – Instructions
- Assessing My Life Experiences – Worksheet

Assessing My Life Experiences

- I enjoy being different and being around others that are different.
- Am I really that different than everyone else?
- I noticed a difference between in-house behavior and leaving the house. The world with family is different than my world with other people.
- I can learn a lot about other cultures in my work environment without going anywhere.
- I realized religious diversity in my upbringing. Now in libraries - there is little political and religious tolerance, there is sometimes a "phony liberalism" in libraries.
- Part of self-assessment, awareness, growth...is painful .
- I am re-evaluating assumptions, facing some white privilege, class and education come into the mix, as well. Painful. Resources are not allocated equally.
- There is a common humanity. We all have feelings.

Our behaviours, attitudes and thought patterns have been influenced by various factors that have had conscious and unconscious impact upon us as individuals. We often attribute it to "the way I have been raised", "it is part of my culture" or "we have been socialized to think like this".

Now that we work in multicultural environments, our interactions with colleagues often reflect certain behavior patterns that may be overt or subtle. We may choose to associate with certain "types" of people, tolerate or be intolerant of certain mannerisms, make "sweeping statements" based on generalizations, stereotype people, etc. With these exercises we ponder: Where does this come from? What prompts these behavior patterns?"

What You Will Need:

The instructions and worksheets

Exercise 1: Assessing my Life Experiences - Appendix B (Instructions and Worksheet, 2 pages)

Exercise 2: How We Develop and Respond to Different World Views - Appendix C

A quiet place for each participant to reflect and self-assess as individuals away from the group

A facilitator

Timeframe:

40 minutes for participants to complete the exercise

20 minutes for group discussion

Process:

With these exercises participants will be able to:

1. Assess life experiences – How broad has been your experience both personally and professionally?
2. Identify what has been the source(s) that has influenced your behavior
3. Reflect on how your understanding of different people has been affected by these sources of learning

The facilitator asks the participants to find a quiet place in the institute location and to be truthful with herself or himself. After 40 minutes of completing the worksheets, participants are asked to return to the lecture room. Be aware that participants may feel a bit awkward and uncomfortable. Some may not want to speak and some many want to engage immediately. The facilitator may ask:

1. “How did you feel doing these exercises?”
2. “What have you learned from these exercises?”

The facilitator allows up to 20 minutes for discussion and concludes with the reminder to participants that the exercises are designed to make them more aware of their own behaviours and mindsets and that they should not judge themselves.

At our institute, participants had the option of going outside in the patio and garden areas. It was wondrous to see each of them find their own space, place, and time, leaning against a step or sitting near a tree with their worksheets and a refreshment offered during the break time. If being “outdoors” is an option and the weather is pleasant, this is a great scenario and conducive to self-reflection.

Part 4: Taking The Lead

Small Group Work, Dyads, Large Group Discussion

After discussing our multicultural environments and how we might have attained our perspectives and views regarding cross-cultural or international interactions, we also realize that as designated leaders in libraries, we must juggle self-assessment and ongoing learning

with “setting the tone” in our libraries. We are both obligated and compelled to take the lead in modeling for others and creating with others, an environment that generates effective multicultural communication – in our meetings, at our conferences and trainings, and with our clients and patrons inside and outside of the library.

What You Will Need:

A recorder/scribe within each small group of 3-5

Timeframe:

20 minutes to discuss questions 1 and 2

25 minutes to discuss and create answers to question 3 and record them (on a notepad or on an easel pad) with the intent to share with the larger group

20 minutes to report out to the group for larger group discussion

Process:

Discuss the questions in small groups of 3-5:

1. What have you done to understand or make your colleagues from another culture, another country, or that speaks another language, more comfortable?
2. What have you done to facilitate a transaction with a library patron that seems to be annoying a colleague, due to cultural differences?
3. What is the ideal environment that could be engendered for effective multicultural communication? How do you go about creating it?

While you are discussing in your small groups make sure that everyone is heard and has contributed. Be mindful, in international groups, of fluency in the host language. Allow the time and space needed for everyone to share.

Return to the larger group for a full discussion. You may choose to record strategies and ideas on flipcharts. The full group may decide to use the suggestions as a draft of “guidelines/tips” to “Taking the Lead in Creating a Multicultural Environment”.

Tips/Guidelines/Questions for Cross Cultural Communication:

1. Become aware of how your own values, lenses, and beliefs block or facilitate your cross-cultural communication skills. Ask yourself: “How willing am I to understand & respect another person’s values, lenses, and beliefs despite some of my own deeply-held values?”
2. Understand that “respect” is demonstrated differently by different cultures so you must learn what is appropriate and consider if you can demonstrate respect in the way that it is understood and accepted. Discuss this.
3. Don’t assume that what you meant was understood and don’t assume that what you understood is what was meant. Be patient.

4. Understand that gestures have different meanings in different cultures. Discuss this.
5. For those of us that talk a lot – try to listen more. For those of us that do not talk very much – try to speak more and ask questions. Practice new skills in the new multicultural environment.
6. Silence may mean agreement, disagreement, deference, approval, or disapproval. Discuss this. Ask – How will we denote agreement or disagreement?
7. Be aware of “direct” and “indirect” communication styles. Being “direct” may appear disrespectful and being “indirect” may appear as if one is apathetic or goes “around” someone in a deceitful way. Assigning “directness” or “indirectness” from our own cultural perspective is a misattribution! However, if we want to communicate in spite of them – consider the differences in comfort level and discuss them. How do you want to be told something? How do you want to accept critique or suggestions for improvement?
8. Be aware of dimensions of culture involving: a) time, b) “power distance” in regards to how we relate to authority, c) identity (collective or individual), d) the preference for “context over content” or “content over context” in any interaction and e) autonomy vs. “honor.”
9. Try to view any dimension or characteristic of culture as a continuum and not as an exact formula. People will fall in either category or somewhere in between. Cultures are complex and can be dynamic (changing).
10. Remember – that the relationship at hand (with a co-worker, a library patron, a community member or leader, a friend, a business partner etc.) is the most important.

Part 5: Global Leadership

World Leaders Who Have Been Effective Globally?

Jimmy Carter
 Bill Gates
 Nelson Mandela
 Gandhi
 Mother Theresa
 Eleanor Roosevelt
 Martin Luther King
 Franklin Roosevelt
 Albert Lutuli
 César Chávez
 Malcolm X
 Nadine Gordimer
 Oscar Arias Sánchez
 Bono

Visioning Exercise and Full Group Discussion

The purpose of this exercise is to conclude the session and move participants from individual retrospection, some small group work and partnership, to full group envisioning and visualization beyond borders of the institute, the library profession, and beyond their own countries. It is intended to create a space, place, and time to imagine, envision and pay homage. In addition to creating a vision, it is a practical exercise, in that we begin to list our own leadership characteristics for global leadership, characteristics that are inconclusive of different world views regarding the words “leader” and/or “leadership.”

What You Will Need:

Imagination

Some research on world current events

1-2 easels with easel pads

Markers

1 facilitator and 1 scribe

Time Frame:

15 minutes

Process:

Facilitator's script: (Of course, it may be adapted)

We are coming to the end of our day/session.

Close your eyes.

Clear your mind.

Push your papers aside.

Now, picture the world. The globe. Mother Earth.

Each of our cultures or languages have a different name for the world.

Picture the globe turning, rotating, as it does.

Orbiting the sun.

In your mind scan different regions of the world.

What do you know is going on there?

In the Middle East? In South America? In India? Nigeria? Japan? In the United States of America?

What are the current events that are occurring globally?

Let's pause again.

Now let's ask ourselves:

- Who are the leaders that have been able to work across these regions and through these issues, and be effective globally, cross-culturally, multiculturally, internationally? (Scribe begins to create a list)
- What are the qualities that they embody? (Scribe begins to create a list)

Conclusion

As people offered up the list of global leaders, the electricity and intensity in the air was palpable. Some stood up as they contributed a name of someone they admired or respected. We, as facilitators and scribes, were acknowledging the answers quickly and writing the names on the flip charts as quickly as possible. We ran out of time but discussed the characteristics that they embodied. The room got very quiet as people realized the enormous simplicity of the characteristics and qualities of great leaders. In some ways, these named leaders needed no explanation. Their names alone demonstrated, for any of us, a certain power of global leadership. Ujala Satgoor (co-presenter and co-author of this article) said it best when she said: "What the leaders had in common was that they transcended their own mental borders." Sandra Ríos Balderrama (co-presenter and co-author of this article), wrote these final powerful words of the day up on the flipchart.

Appendix A

Multicultural Norms & Leadership Styles

1. Locating Yourself in a Multicultural Environment

Identify Cultural Groups and/or Languages and Traditions in your country, in your workplace, and among your clientele, users, and patrons.

2. Multi-culturalism in the Workplace

Identify the various traditions and languages represented in your workplace

What are the qualities you value about your colleagues?

What are the behaviours that annoy or upset you?

3. Our life worldview

How we develop and respond to different world views?

How has your understanding of different people been affected by these sources of learning?

4. Taking the Lead

What have you done to understand or make your colleagues or library patrons more comfortable?

What is the ideal environment that could be engendered for effective multicultural communication?

5. Effective Multicultural/Global Leadership

What are the elements for effective cross-cultural, multicultural, global relations? Cite examples of world leaders and the qualities they embody.

Appendix B

Assessing My Life Experiences

Instructions

Assess how diverse your life experience has been to date. (Diversity includes race, gender, culture, religion and language, ethnicity, socio-economic status, occupation)

1 = Not diverse

4 = Somewhat diverse

10 = Very diverse

For example, if your mother was Italian and your father was Italian, and your relatives were Italian, you could rate your family of origin 1. But, if your mother was Chinese and your father was Brazilian, your mother was Christian and your father was Muslim, your mother spoke Mandarin and your father spoke Spanish, you may want to give yourself a 10.

Family of origin	1	2	3	4	5	6	7	8	9	10
Neighborhood as a child	1	2	3	4	5	6	7	8	9	10
Primary School	1	2	3	4	5	6	7	8	9	10
High School	1	2	3	4	5	6	7	8	9	10
First work experience	1	2	3	4	5	6	7	8	9	10
Work experience – 5 years ago	1	2	3	4	5	6	7	8	9	10
Current work experience	1	2	3	4	5	6	7	8	9	10
Neighbourhood where I live	1	2	3	4	5	6	7	8	9	10
	1	2	3	4	5	6	7	8	9	10

Adapted from material used by Absolute CRD (PTY) Ltd 2006. Developed by Dr Barbara Love, University of Massachusetts, Amherst and Dr Don Bratcher, Georgia Institute of Technology.

Assessing My Life Experiences Worksheet

Look at your ratings

- What do you see? Which are lower? Which are higher?
- At what point of your life did your experiences become more diverse?
- Were you prepared for living/working in a diverse environment?
- What impact did diversity have on you when you found yourself in a multicultural environment? How did you feel about being with people different to yourself?
- What about your current work situation? Is it diverse? How do you feel about it? How does the diversity impact on your work? Your team?
- What have you learned from this exercise?

Appendix C

How We Develop and Respond to Different World Views

How has your understanding of different people been affected by these sources of learning?

Source of learning	Learned attitudes and behaviours
Family	<ul style="list-style-type: none">••••
Friends	<ul style="list-style-type: none">••••
School	<ul style="list-style-type: none">••••
Work	<ul style="list-style-type: none">••••
Media	<ul style="list-style-type: none">••••



“We wanted to create an environment that changed the boundaries of the known learning situation, an environment where one’s command of a language did not matter, an environment where all the cultural norms were new and strange, an environment where no one participant had more experience than the other. That environment was Pamoja.”

Pamoja: A Learning Activity for the Information Age

Many thanks to the two former Peace Corps volunteers, Gail Wadsworth and Wendy D. White, who developed this wonderful learning activity and make it freely available for everyone around the world.

For a free copy of Pamoja go to the Mortenson Center Web site.

Susan Schnuer, Associate Director, Mortenson Center for International Library Programs, University of Illinois at Urbana-Champaign

Introduction

Pamoja is an experiential activity that reaches across the borders of language, culture, and class to connect individuals, and in the case of this leadership institute, to connect librarians. The activity engages the participants in discussions about issues of global access to information. It explores how cross-cultural communication can facilitate or hinder access to information. It is presented in a game format and, as such, has some competitive moments, but more importantly creates a free-wheeling environment that encourages participants to focus on building relationships and to put aside concerns about cultural differences.

As one participant commented: “This kind of lighthearted interaction was the most enlightening to me. I actually began to connect with my peers, both international and American.”

So why introduce an experiential activity, a game, into this important leadership institute?

The purpose of the leadership institute is to encourage participants to explore their leadership styles, values, and attitudes about working with people from other cultures and countries, and to offer alternative strategies for engaging in those relationships. Lecturers presented a variety of ways to think about culture, language, libraries, and leadership.

Much of the institute was offered in a more traditional format: presentations that included small and large group discussions. The traditional learning format

avored individuals who have a good command of the language being used and were comfortable in the learning environment. We wanted to create an environment that changed the boundaries of the known learning situation, a environment where one's command of a language did not matter, an environment where all the cultural norms were new and strange, an environment where no one participant had more experience than the other. That environment was Pamoja.

In the words of some participants:

- “so many different approaches to creating a culture, communicating, and making things work on many different levels”
- “broke down a lot of communication and personal barriers, such as shyness”
- “joyous in that it got us working together as a leadership team in a way that nothing else could...”

Global library leaders have to develop skills in communication, identifying and naming geographical and cultural barriers, understanding the priorities of others, and becoming great listeners. Pamoja was the stage that allowed us to practice those skills.



Drawing borders

concepts that have been introduced in more traditional ways. Third, the facilitator must be skilled at running this type of activity, able to manage and assist with a light touch, and to reintroduce learned concepts into the discussion.

Pamoja – The Activity

The activity takes two and a half to three hours to play, and is best done in one-session, with a short break. It can be played with as little as 12 players or a maximum of 36. The main idea is that the participants are grouped and assigned to a country (Red, Green, Yellow, etc.). Each country group then creates a culture characteristic and develops information facts based on that cultural characteristic. Here are examples of cultural characteristics developed by the participants:

- A country where all conversation is sung

Content

Most librarians at some point or other in our careers have attended a training session that included an experiential activity, and have attended it with more or less enthusiasm. There are three keys to success when running this type of activity. First, the experiential activity must be thoughtfully developed, complex enough to replicate aspects of the real world and yet open enough to offer the participants the freedom to explore. Second, it must be used to reinforce

- A country with very friendly people
- A country where everyone likes to fish
- A country where you had to dress fashionably
- A country where you had to wear blue

Each group had to model their country characteristic during the game (and it is a secret), a strategy that adds to the fun and creates an additional level of difficulty. Each country group receives money (mojas) and some cultural and or educational institutions: universities, public libraries, and cultural centers. It is up to each country group to develop an information center building plan, deciding for example that they may want a public library in each region of the country.

The goal of the game is to exchange information facts with other countries in order to obtain funding that can be used to buy institutions such as libraries, and therefore meet the goals of your country's building plan.

There are three parts to Pamoja:

- Orientation and team preparations (50 minutes)
- Play (45 - 55 minutes)
- Debriefing (45 minutes)

1. Orientation and team preparations

Each team has about 4-6 members. The group has about 45 minutes to develop a cultural characteristic, create information facts and an information center building plan. Each individual also decides on their role in the game. They can choose to be a gatekeeper (like an immigration official), an ambassador (travels to other countries), or a country representative (the person who negotiates with ambassadors from visiting countries). To facilitate the game, there is also a foundation and a bank.

2. Play

The participants, modeling cultural characteristics and strategies in hand, begin to slowly play the game. The start of the game is chaotic as some countries are still not ready, others are rearing to go, and many have questions about how to proceed. In about 10 - 15 minutes, everyone is fully engaged in play and negotiating with other countries in an effort to obtain information facts. Once the play starts, it is very difficult to get the players to stop.

3. Debriefing

This section of Pamoja is core to its success as a learning tool, here is the place to discuss observations, reactions, questions that participants have. A key section of the debriefing is guessing country characteristics and debating if the characteristic assisted or hindered in the game.

Pamoja: A Learning Tool

Pamoja is a flexible learning tool that allows the facilitator to adapt it to the learning situation. It was a wonderful tool for the Thinking Outside the Borders Library Leadership Institute. We were interested in developing leadership skills that would work across borders so



At the negotiating table

much of the debriefing focused on having the participants verbalizing their answers to questions such as:

1. Were participants able to identify cultural characteristics and adapt strategies to fit the context?
2. Why was it easier to negotiate with some countries? How did their cultural characteristic impact the negotiations?
3. Did their communication style allow them to participate fully in all parts of the game, including negotiations?
4. Did some of the roles (ambassadors, bankers, country representatives, donors, gatekeepers) allow you to take more of a leadership position within the country or game?
5. What was the leadership style of your country group? How was it established?
6. What was the one lesson about leadership that you understood during this game?

Pamoja: Facilitation

Pamoja is a complex activity and it requires a lot of advance preparation, usually off-site, anywhere from 2-5 hours. Many of the details are not described in this module and people interested in using the game should consult the guide at the Mortenson Center Web site. The facilitator of this activity plays several important roles:

- *Logistics and Facilities Coordinator*

Setting up the game and having the facility ready is crucial to the success of the game. Since Pamoja has so many details, it is critical that the facilitator spend the needed time to understand the progression of the game and verify that the venue is set-up as needed.

- *Communicator*

There is a certain amount of nervous tension that surrounds any activity of this type. Participants are unsure of what will be needed and how they will be asked to perform. The facilitator needs to establish immediate control over the situation, reassuring the participants, and develop an atmosphere of trust – an environment where confusion,

miscommunication, and questions are all acceptable. So it is important to communicate the purpose and the rules of the game in many ways: verbally, with Powerpoint back-up, examples, modeling the play, and many, many repetitions.

It is also important to understand that no matter how many times the information is presented, participants will interpret it in different ways. The facilitator should not overemphasize the rules of the game. It is precisely this different interpretation of the situation that is so like real life, and so necessary to understand and adapt to if one wants to work across borders.

- *Judge*

Some participants want to play the game exactly by the rules and want the facilitator to decide what is correct. It is reassuring to them to have someone decide what is right and wrong.



Bargaining with the bank

- *Distant Leader*

While some of the participants want firmly enforced rules, others revel in the gray areas of the rules, and there are many. Facilitators can choose to tolerate unusual practices. Some participants have tried, and at times succeeded, in bribing the bankers or the donors. Many participants have used interesting and unusual bargaining strategies. An environment that encourages the exploration of these boundaries creates a rich experience for the participants.

- *Teacher*

During the debriefing session the facilitator is the teacher. It is important to have developed before the debriefing the learning points that you want to emphasize during the discussion and then to craft questions that will elicit discussion around these learning points. It is a delicate balance since the content is coming from the participants and it does not always fit neatly into the predetermined curriculum. However, every comment or remark is a learning moment, so the facilitator must be able to move quickly to highlight some point or other before jumping to another topic.

- *Counselor*

Pamoja does mimic real life and therefore can create situations that might be interpreted as difficult or hurtful. In one case, a country team had decided that they had a matriarchal culture and would only negotiate with women. A male from a neighboring country was very upset at his treatment in this country. In this type of situation, the facilitator has to move the situation from the personal to the educational, in a delicate but firm manner.

Once the male in the situation understood that the cultural characteristic had created the communication barriers, a wonderful discussion ensued.

Summary

Pamoja is a wonderful learning activity for a leadership institute. It is adaptable, flexible, and just plain fun. Here are some tips if you want to use Pamoja in leadership training.

- Experiential activities can create a safe space for trying new skills and exercising leadership.
- Games and experiential activities change the traditional learning situation and therefore cause some tension. It is critical that an environment of trust is created so that individuals feel safe to operate within this environment. A safe environment requires that someone be in charge to monitor activity and also be open to all questions and comments.
- The purpose of the game is to allow everyone an opportunity to exercise leadership, therefore it is critical to monitor the exercise and to make sure that everyone has the opportunity to lead and a voice in the discussion about how to lead.
- The facilitator needs to be clear about which leadership skills and concepts that will be reinforced during the activity. Those skills and concepts will drive how activity is run.
- Running Pamoja is complex and, as any presentation, needs preparation time.
- Research has shown that the best learning happens on a peer to peer basis. In Pamoja, the participants are all teachers and learners.

Pamoja did and can add value to any library leadership institute. Perhaps the words of a participant best express its impact:

“I feel that this exercise was the catalyst to develop the trust needed to move beyond your ‘average’ participation.”

Resources

For a free facilitator’s guide to Pamoja go to the Mortenson Center Web site.

Appendix A

Pamoja - A cross-cultural simulation game

What is the goal of Pamoja?

- Different cultures value and share information in different ways. Pamoja helps the participants observe the principles of the free-flow of information in a fun way.
- Pamoja will help participants consider the development of information resources, information sharing and information gathering in an intercultural context.

What happens during Pamoja?

- Participants will be assigned to different countries. They will build information centers within their countries and then trade and share information with other countries.
- The game is fun and allows creativity and openness to new ideas and beliefs.

Country Goals

- Each country team will develop and follow a plan for building information centers in your country while interacting with and learning about other countries.

Country Development

- Each country is designated by a color.
- Each country has information centers: public libraries, universities, museums and community centers.
- Within each country, team members will have the following roles:
 - Country representatives
 - Ambassadors
 - Gatekeepers

Pamoja Schedule

- General orientation and team formation, 20 minutes
- Country and culture creation, 20 minutes
- Role selection and orientation, 20 minutes
- Playing the game, 45 minutes
- Debriefing, 40 minutes

Country Creation

- Draw a country with various geographic areas. The areas will be delineated in a handout for your country.

MONEY\$\$\$\$\$\$\$\$

- The Pamoja Union currency is called Mojas.
- You can buy:
 - Community center 500 Mojas
 - Public library 1,000 Mojas
 - Museum 1,000 Mojas
 - University 1,500 Mojas
- Some countries will be richer than others.

Cultural Characteristics

- Each country has to decide what is their defining cultural characteristic, this characteristic is kept secret from the other countries since they will have to guess the characteristic at the end of the game.
- You MUST model your country characteristic.

Examples of Cultural Characteristics and Infofacts

- Once you have a cultural characteristic, then you will come up with 15 infofacts about your country that reflect your cultural characteristic.
- Cultural Characteristic: Reading is most important in our culture.
- Infofact: Every child in our country receives a book in the hospital.
- Modeling characteristic: Everyone in the group walks around with a book.

Country Building Plan for Information Centers

- Once you have a cultural characteristic, then you will write a short building plan that describes how you would like to position information centers in your country. Your building plan should be related to your cultural characteristic.
- Example: Libraries and Universities will be placed in all regions in our country because we value reading.

Time to go to your country

20 minutes

- Review contents of packet
- Write name and country color on nametags
- Read team handout
- Draw the country with all regions
- Decide on one cultural characteristic
- Write 15 infofacts on post-its and post on or around the country
- Decide on how you will act out cultural characteristic
- Develop your country's building plan

The roles

- Country representative: stays in the country, is responsible for information centers and negotiates with the ambassadors from other countries
- Ambassadors: select search cards from gatekeeper, go to other countries, get information from other countries and share information and money with the team
- Gatekeepers: stay at the border of their country, allow or refuse entry to the country, assist the country representative, report for the team, manage the search cards and money
- Donors: listen to requests from countries for funding and can provide money to countries to build information centers
- Storekeeper/banker: sells information centers, issue money, and authenticates information searches

Sample search

- Ambassadors will randomly select search cards from a bag held by the gatekeeper of their country
- Example: Get an infofact from a public library in the Lake District of Country Green

Pamoja Chance Card

- Example: Country farthest away from you faces an economic crisis; go there and donate 100 Mojars to their country representative

Remember

- Negotiation is always an option.
- Donors are always approachable.

Back to your countries

10 minutes

- Decide team roles
- Gatekeepers receive bag of search and chance cards
- Countries finish their infofacts and building plans.



“The challenge is learning to work with, through, and in respect of differences with a willingness to exchange and even integrate our new learning in order to create something new. It is up to us as library leaders to be models as we guide one another.”

Welcome to the Multicultural Café: Shifting The Context and Creating Inclusion

*Sandra Ríos Balderrama
RíosBalderrama Consulting*

Welcome to the Multicultural Café. We have for you, colorful table coverings that are textiles and shawls from Mexico, Turkey, Kenya, and Japan. The music that is playing is from our brothers and sisters in the South Pacific Islands. In the middle of each table is a “talking item.” The small mosaic elephant comes from Thailand, the incense burner from India, and the antelope made of wood comes from West Ghana. In front of each seat you will see a gift from my mother to you – a writing pen and a journal. It is my family’s way to travel with me in spirit, if not in person and to help me welcome you. I hope that during this time we will remember where we came from and remember where we are going. The change in time zones often leave us disoriented and in a daze. We are gifted in this institute with a time, space, and place to discuss the beauty of our differences and the challenges we face. The challenge is how to learn to work with, through, and in respect of differences with a willingness to exchange and even integrate our new learning in order to create something new. It is up to us as library leaders to be models as we guide one another. It may not be the Western way that we rely upon. Nor the Eastern way that we seek. Nor the Southern way. Nor the Northern. It may be all or none but the way that we will discover will be a new way, created and blended from thoughts, ideas, strategies, commonalities, and differences discussed here. Our ancestors shared in joy and sorrow, adversity and in triumph. They look upon us and wish us well. They remind us to listen to the universal drum – the drum that we all share – the heartbeat that is our mother.

Do you hear her?

Do you feel her?

Welcome!

To the Multicultural Café!

The introduction above was performed at the beginning of my session “Communicating in a Multicultural Environment” at the Thinking Outside the Borders institute of September 2005, in Springfield, Illinois, United States. Although it is in tune with the World Café methodology, I have always valued the idea of creating context in order to make multicultural people feel welcome in the library. Creating context has involved colors, music, food, storytelling, acknowledgement, and celebration. With context in place then content is more well-received. At one institute we touched on the ideas of high-context cultures and high-content cultures. We probably are all a little of both or simply at different places on the continuum. I have found that in working with multicultural groups that context is just as important as content. This article describes a number of methods to create context that is equalizing and that is generative of group conversation where every voice is heard.

Creating a Café Space

At a café one feels relaxed. For some of us it is not a café but a neighbor’s porch. For some of us it is just under the “learning tree” where we feel the shade, hear the birdsongs, and learn from the elders. For some of us it is a bench on the plaza where we talk with each other as the woman with the beautiful *rebozo* (shawl) walks by. Humble or fancy, indoor or outdoor, metaphorical or literal, a café typically calls us to refresh ourselves, to slow down, to rest, to listen and to be listened to, to exchange the concerns and passions that we carry around for the day or a week or a month or a lifetime.

Interestingly enough, “*café*” in Spanish means coffee, as well as the color brown. How often have I been invited for “un cafecito” or “café con leche” (*a small coffee or coffee with cream*) with the meaning being - “let’s visit” or “let’s meet”.

At the Thinking Outside the Borders institutes, the planners allowed time during and between sessions for everyone to socialize and engage with one another. Still, the values, culture, and language of the United States, as host country predominated. The planners wanted to make an extra effort to create a time, space, and place in which all would be welcome and at the same time, out of their “comfort zone”. The “comfort zone” is the place, time, and space in our daily lives where we can depend on how other people will act, speak, and behave. In the “comfort zone” there are not many differences or challenges, only our assumptions based on the societal or cultural norms that we have been taught, have grown up with, or simply gotten used to.

Creating a new space is about creating a new context. In addition to “what” we say it is important “how” we say it, share it, listen to it. In addition to saying “welcome” it is important to create welcoming surroundings. What is welcoming to me may not be as welcoming to you. My challenge was to foster discussion on cross-cultural and multicultural content and curriculum within a context that was:

- Welcoming to all
- Uncomfortable for all
- Safe for all
- Equalizing for all

Susan Schnuer, Barbara Ford, Bonnie Matheis, Joe Natale, and I spoke one day of the “third space,” the space that is neither mine nor yours but ours. It is also the space where a piece of you and a piece of me overlap, intersect, or is interdependent and that space is a shared space that is new. I was charged with facilitating such an environment during my sessions. What a challenge! This new space would:

- be welcoming of every “voice”, that is, content of what any participant might say in his or her manner, style, language, and timing
- be inviting and then accepting of all perspectives, no matter how different
- be welcoming of inquiry as a way to learn about, of and with one another in non-intrusive ways
- be encouraging and supportive of the anger, confusion, sadness or frustration that occurs when our deeply held assumptions, norms, and values are disagreed with or challenged
- be encouraging of the idea that sometimes we need to pause or “hold space” (as my good friend Perviz says) until we transcend from reacting viscerally to difference to realizing that the deep reaction is the beginning of deeper insights and learning
- remind us that we come to the table, or circle, or classroom as equals but that equality is not sameness
- model what multicultural communication could look like, be, become when it is truly inclusive and created by all who have been included

Three Institutes

I was honored to participate in three of the Thinking Outside the Borders Institutes in the United States with the following sessions:

- September 2005, Springfield, Illinois, United States, “Communicating in a Multicultural Environment”
- November 2006, Allerton, Illinois, United States, “Diversity and Multiculturalism in United States Libraries” and then “Perspectives on Diversity and Multiculturalism in Libraries” with Ujala Satgoor, Deputy Director: Special Units, Library Services, University of Pretoria, South Africa
- February 2007, Phoenix, Arizona, United States , “Multiculturalism and The Power of Cultural Values from the heart...to the head...to the library...to the world...and back again”

Each of the three institutes had approximately 40 participants. Half were Americans from the state that the institute was held in (for example, Illinois and Arizona) or at one institute there were librarians from Texas, Washington, DC, Ohio, Oregon, Florida, Colorado, Pennsylvania as well, half were from other countries including Bulgaria, Canada, Chile, Hungary, Jamaica, Kenya, Laos, Namibia, Nigeria, Philippines, United Kingdom, Jamaica, Dominican Republic, Nicaragua, Mexico, Peru, Argentina, Zimbabwe, South Africa, Japan, Vietnam, Costa Rica, and Columbia.

Each institute also had observers, evaluators, and planners that were present. At times, they also participated enthusiastically; therefore, there were typically about 50 people in the room at a time. Each institute had round tables or square tables of 4-6 people at each table. I requested 4-5 easels with flip charts around the room. I also requested permanent markers of the colors dark red, dark green, black, and dark blue and plenty of tape.

Methods for Creating a Time, Space, and Place and Convening Groups

This section will describe the tools and methods used throughout sessions.

- Music
- Storytelling
- Insuring Everyone's Voice: The Talking Stick or Talking Item
- Sharing Responsibility for Time: Passing the Wristwatch
- I Would Rather Write Than Speak: Journaling, Index Cards, Post-Its
- Brainstorming With Flip Charts and Without Judgments
- Communicating in Multiple Settings (dyads, small groups, large groups)
- Facilitation for Inclusiveness in Large Groups
- The World Café
- Visualization

Music!

Music is often referred to as the universal language or I have heard that when bands or musicians are playing, they provide an example of how diversity of instruments and musicians can create synergy, a great new combined outcome called music. At the Multicultural Café session described in the very beginning of this article I played a CD from the South Pacific ("Putumayo Presents South Pacific Islands"). Some of the participants entered the room, after lunch, dancing a little bit, shaking their hips, and expressed a pleasant surprise that I was playing African music. Was it African? Where was it from? It sounded like "home" to a few of us. It was the sounds, the rhythm, or maybe the intonations and percussion. Whatever it was, it stirred conversation. I also played music from a woman of South Asian background ("Kiran Ahluwalia"). One of the participants told me that she was happy to hear this music, "her" music.

While preparing for my presentation at the Arizona institute I played the South Pacific music and the planners who helped me set-up and who had been working vigorously the previous night and all morning, expressed a happiness to hear music.

Music is relieving and can sometimes bring out the most genuine in us. It helps to create atmosphere, set the tone, set context, and for some of us it helps us to be ourselves. In an institute of this caliber you want the richest of each person's essence to emerge.

Music may be used in the following ways:

- As an introduction and part of your “welcome” to the session
- As part of the closure when you are winding down or celebrating the work accomplished
- During the breaks
- While journaling
- While working with partners

Of course your choices of music are important. Do you want lively music? Flute or piano music that encourages reflection? World music to create a global mood? It is up to you to find the music and enjoy integrating and infusing it into your program and curriculum. Music speaks to all of us and gets us talking about our favorite music, instrument, singer, violinist or the music we used to play, we want to play, and the music that we want to exchange.

Storytelling

Telling our story. Telling a story. Telling the story. Telling stories. All of us our storytellers. When we piece together a memory, remember the stories of our grandmothers and grandfathers, when we pass down a folk tale, or simply tell what happened during the day or that year, we are storytellers. Some of us are quiet and some of us are expressive when we tell stories. In the introduction to this article, I demonstrate how storytelling could be integrated into a “welcome” while hopefully relaxing visitors and at the same time, provoking them into thinking about global connections. In my presentations I often share a story of myself or my ancestors in my efforts to reach out and remind us of both the differences and commonalities in our cultures, our upbringings, and our worldviews.

The importance of “storytelling” came to my attention as a children’s librarian who observed Ms. Starr LaTronica (Youth Services/Outreach Coordinator, Four County Library System, Vestal, New York) at work. We visited a children’s classroom to discuss our library’s summer reading program. The children were restless, uninterested and not listening.

Ms. LaTronica began to tell a story – a story from Haiti. I witnessed the transformation of the room’s environment from chaotic to tranquil. The children quieted, became interested, engaged, and curious. I saw one little boy push his desk closer to her. From that day on, I was determined to learn how to tell stories, especially because I worked in a neighborhood where the children were not regular readers. It served as a wonderful tool for welcoming children and leading them to books.

With storytelling we can all practice listening, experience being read to, recited to, and we can feel the rhythm and cadence of a storyteller’s voice. This is also music. The language of the stories transports us to another world of the past, of the present, of the future, of imagination.

Insuring Everyone's Voice: The Talking Stick or Talking Item

I did not use a stick in my presentations but rather “talking items”. These were small tokens or gifts given to me over the years that I felt were given with generosity and would therefore, add to the Thinking Outside the Borders environment.

When you have the talking item in your hand, then you may speak without interruption for a period of time. It is your “turn” to speak, share, and express passion, dissent, opinions, agreements, and concerns. The full group listens to you, be it at a table, within in a circle, or in a classroom, for as long as the person has the item. This method is a way to insure inclusion and that everyone present is heard.

This exercise can serve as a relief to those that need and want the given time. The dynamics of group conversation may include:

- People who are very comfortable speaking in groups without formal structure
- People who feel very uncomfortable speaking in groups without formal structure
- People who have a lot to say and frequently, without hesitation
- People who speak less but when they speak it is worth waiting for
- People who are so anxious to speak they forget to listen and often interrupt others or finish their sentences for them so they can have their turn to speak
- People who will not continue what they are saying or say “please, let me finish my thought” if they are interrupted
- People who have varied fluencies with the host language
- People who have varied fluencies with the visitors’ languages
- Any of us may are challenged when speaking about something complex or emotional in languages that are not the home or native language
- Any of us may be challenged when speaking about differences, even in the home language

Sometimes people get a little nervous as their “turn” comes around. They may get impatient or find themselves drifting as they “wait their turn.” Others listen with intent, focus, and are happy to hear people that they had not heard from before. In each scenario, each participant is requested to stretch out of their comfort zone in order to practice contributing to the group in new way.

The talking item may be passed from person to person around the table or circle or the person with the talking item in hand may pass it to the person of choice. People that are given the talking item could be sitting anywhere but the most important thing is for the whole group to insure that everyone in the group has had time with the talking item.

In one institute we used the items in the middle of each round table. They were the little elephant and the incense burner described in the very introduction of this article.

Depending on the question or what is being shared, a participant might want to speak in their home language in order to express themselves accurately. Of course, you may have someone else who will help to translate. You will need a little more time with the talking item in this case. If there is no translator, then the group must trust that the person spoke from the heart because it is her/his native language.

At another institute for another university we spontaneously created a circle at the end of the final day in order to share closing thoughts and what everyone would take back home. I took off and used a bracelet from East Africa that was given to me by a good friend. If your talking circle is spontaneous, you are sure to find an item in the room that can be shared and passed around. The talking stick can be used to share introductions or to share closing thoughts. The group may also have a question that they want to address such as:

- “What has changed for you since coming to this institute?”
- “What will you create when you return home?”
- “What concerns do you have as a librarian?”
- “What do the words ‘international leader’ mean to you?”

Time is always limited in any institute or conference setting. I like to use the next method to help a group monitor the time.

Sharing Responsibility for Time: Passing the Wristwatch

I learned this technique long ago from Shakti Butler and Michael Bell (who have worked on transformational leadership, cross-cultural work and social justice) and it is a way for the whole group to share responsibility for keeping time. You may accompany the talking stick method with also passing a wristwatch. The wrist-watch is used for timekeeping and given to the person that has just held the talking item and has finished their time.

For example, Perviz may be to my left. She has the wristwatch. I have the talking item and I am given 5 minutes to speak. I begin speaking. Perviz tells me or nudges me when I have 1 minute left and then she gives me the wristwatch when my 5 minutes are up. I may end my talk before my 5 minutes is up and ask her for the wristwatch or I may take the full 5 minutes, however, when she passes me the wristwatch, I must stop talking and begin to monitor the time of the other colleague sitting on the other side of me.

Sometimes when someone ends sooner than the allotted time they will offer up their “unused” time (for example, an extra 1 or 2 minutes) to the next person so he or she increases their total to 6 or 7 minutes. and that person will want the extra time and sometimes not. Typically there is laughter and smiles in the room as we acknowledge our differences - some of us being people of few words and others of us who enjoy speaking a lot and often!

I Would Rather Write Than Speak: Journaling, Index Cards, and Post-its

Writing is another way of expression and especially in an international environment any participant will welcome an opportunity to write in their home or native language.

Journaling

- creates a space within a space to reflect on an issue, idea, or a question
- allows time to express one's self without interruptions or censorship and with creativity using script, diagrams, and drawings
- allows time to clarify or collect your thoughts before sharing them with a partner or small or large group
- offers a reminder to take a few minutes a day to journal or reflect when we are back home in our libraries

Even 3 minutes of your own peaceful time can make one feel rich in a 24 hour day. Imagine 5 minutes and then 15 minutes to write your thoughts and unload them onto paper or perhaps it is onto your laptop. Of course, the journaling period must be timed and limited. It offers to library leaders, as well, an example of taking time in the day to regroup through writing.

Rather than having a journal participants may be given index cards to write down questions or thoughts during the day. When a speaker addresses a large group most people who feel comfortable speaking aloud will address the speaker directly. For those that are not as comfortable speaking directly with the speaker, they can submit an index card to the facilitator. The facilitator may collect index cards and read the comments or questions aloud to the speaker. The opportunity to write in the home/native language is sometimes welcomed if someone feels more comfortable writing then speaking. Or the participants may want to write their questions down in their home language for themselves and then be better prepared to translate it orally when they speak up directly.

Post-its are also used to write down answers, opinions, votes. They were used in the Pamoja exercise described in this publication and were used in an exercise in the November, 2007 session with Ujala Satgoor. In the latter, we asked participants to write down "What behaviors annoy you or make you uncomfortable?" and "What behaviors do you find welcoming?" and to post their post-its on a large easel. Later on, we read them aloud but no one really knew whose was whose. The emphasis was on the content at that point and not on who said what. The content was sensitive and we wanted honesty, so the opportunity to write honest answers was useful.

In summary, writing allows for a different form of expression that allows the group to be inclusive. Some of us do not enjoy writing and this portion of a session may be uncomfortable. This is good to acknowledge. I have been in sessions where someone chooses not to write but just sits quietly during the allotted time.

Brainstorming with Flip Charts and Without Judgements

Brainstorming allows for the expression of first ideas, questions, responses, and concerns. When they are documented by scribes then the ideas are visualized and can be viewed by the whole group as the results of collective energy and input. How easy can brainstorming exercises be? Are they old-fashioned? Maybe so, however, I find the act of hearing, acknowledging, writing, making sure I heard correctly and understood correctly, posting up thoughts, and finally viewing them all around the room – is a multi-sensory communication experience that helps to bring the group together.

Those of us who have participated in workshops are familiar with them, however, brainstorming exercises require attention to inclusivity, especially with a multicultural audience. Typically a brainstorming group requires a number of scribes, sometimes called recorders. You need:

- Recorders/scribes
- Easels with flip charts (strong easels and flip charts that have “sticky glue” behind make it easy to post up)
- Dark markers/felt pens (to be seen from far away)

The facilitator's role is to insure that all have a chance to contribute their thought – unedited, un-judged, and uninterrupted. Facilitation will be addressed more thoroughly in the following section of this article but it is important for a facilitator of an international group to take note of who has spoken and who hasn't or if people are unedited, un-judged and uninterrupted. The facilitator also works with the recorder to get the words down on paper as legibly as possible. The recorder should not change what is said for convenience. If the recorder needs or wants to shorten what is written, the recorder must ask permission of the contributor and/or ask if what she has written conveyed the speaker's meaning accurately. Sometimes participants will say “Yes!” or they will say “No, not really . . .What I meant was...” The purpose of such detail is to, yet again, make sure that people are able to use their voice, in their manner and style and with their own language – be it the home/native language or the host language.

Once again, these notations are appropriate for attempting a truly inclusive brainstorming session, in which everyone is heard in their own voice and style. It is often in this environment where each person's most powerful sentiments emerge and can catalyze a turning point for the session to move from “typical” to “in-depth” conversation related to international issues and relations. If someone is shut down with their idea or begins to feel edited – then the kernels of authenticity and meaning are lost.

Some of the brainstorming exercises in the institutes included:

1. Name the diverse cultural groups in your country and in your workforce
2. Please share a value that you obtained from your family

Communicating in Multiple Settings: Dyads, Small Groups and Large Groups

It is important to have multiple settings for participants to practice communication in ways that they are familiar with and ways that are totally different.

Dyads – two people

Dyads allow for exchanging more details of complex situations because there are only two people. Often these partnerships set a tone for the rest of the institute. Peer-to-peer conversations can often establish relationships and even lead to making change. Using dyads is an excellent way to practice listening. If your dyad is allowed 15 minutes then one participant has 5 minutes to speak, to tell, or to describe while the other listens. Then the other speaks for 5 minutes, while the other participant listens. You may use the added

minutes to practice free-flow (unstructured) question and dialogue, but it is up to both participants to speak and listen and check in with the other, to see that they have felt as if they have been able to speak and if they felt listened to. You learn to practice with one another.

Typically participants are given an assignment, a question, or an issue to discuss. It could be as simple as

1. Talk about the educational values that shaped your world view
2. Describe one issue at your library that concerns you and that you would like to change, if you could
3. Describe the diversity of cultures represented in your workforce and/or the clientele that you serve
4. Talk about the challenges of serving multicultural populations and the strategies you have used

Triads – three people

When we are in groups of three, we become more than two opinions and two contributions. We move from the potential partnership of two to a group, maybe a “team”, a tribe, of three that is not too big, nor too small. There are more opportunities to practice speaking and listening, as well as having an extra person to volunteer to record or report anything out to the larger group. There is also more room for difference of opinion.

Small groups (from 4 – 8)

With a group this size it is best to try “free flow” or unstructured conversation. The group needs to observe if one or two people dominate the conversation either because they are comfortable speaking, or are “taking the lead” and/or the rest of the group is deferring to them, therefore, abdicating their own responsibility for contributing. A facilitator can encourage the group to experiment with the “talking stick” as well.

When the collective is insuring that everyone has had a chance at expressing their voice, then there is success. The context of the group sharing is almost more important than the content.

Large groups

Large groups require facilitation and a timekeeper in order to foster inclusiveness. Always think about room-set up and how you want the room. Is it conducive for conversation? The variables are the comfort level and experience of the facilitator. If the group is of 50 participants or larger it may be best to have more than one facilitator.

a) Group up to 50

The facilitator needs eyes all around her head. This means that as you listen you must be sure to acknowledge people in the front, in the back, to your left, to your right, that have indicated an interest in speaking. Ask the participants to offer their names and how they want to be addressed. Always try to “name” people according to how they would like to be named. If this is not possible, then identify them in a respectful way when you call upon them.

The facilitator needs to move around the room, acknowledging, encouraging, allowing people to finish and nudging them to wrap up so that someone else can speak, and finally steering people to address the group rather than the facilitator herself. The facilitator is often asked to repeat the question and should. If she cannot, then the facilitator must ask the speaker to repeat their question or comment. The facilitator is also a timekeeper (unless you have another timekeeper). Regardless the facilitator must steer towards closure, wrap-up, summary, and/or any conclusive remarks.

b) Group up to 100 or more

It is best to have two facilitators. One facilitator can do this if they are experienced and feel comfortable. Having a microphone that is in the middle of the room for people to walk up to or a mobile microphone that the facilitator(s) can bring to the speakers are always helpful. Acknowledge people that are waiting to speak, listen to the speaker, help them come to a close if necessary, be ready to acknowledge the next person who is waiting and the next person, keep people on topic and, on course with some allowance for tangents and stories. It is an art and skill but simply practicing it often is helpful. It is important to ask:

- Who did we want in the room?
- Did we hear from who we wanted in the room?
- Has every voice been heard?
- Has this group conversation been inclusive?

You may also remember:

1. Acknowledge who wants to speak.
2. Listen.
3. Thank them for sharing.
4. Go to the next person and acknowledge the ones who are waiting their turn.
5. Encourage all to listen and have their presence given to the speaker and not the facilitator.
6. Be mindful of time or ask for a timekeeper.

Facilitating for inclusive dialogue requires physical energy but it is well worth it. You often will witness an increased energy and synergy in the room.

The World Café – Shaping Our Futures as Conversations that Matter

The World Café created by Juanita Brown and David Isaacs is an excellent methodology of group development and discussion of meaningful questions, the gathering of one another's wisdom, and the creation of new ideas, and strategies, while inviting and integrating differences. Experimentation is encouraged with this method and this is certainly in line with the Thinking Outside the Borders principles which encourage flexibility. The World Café method is being used world wide and plenty of information is accessible at The World

Café Web site. The book (*The World Café: Shaping our Futures through Conversation that Matters* by Juanita Brown with David Isaacs and *The World Café Community*, Berrett-Koeler Publishers, Inc., San Francisco, 2005) is available at the time of this writing in Spanish, Portuguese, Japanese, German, and Chinese. You will find online information in multiple languages as well. It is fun to pour over the site and read from community blogs, learn about events, join an online community, review and join the directory. You may also sign up for a free newsletter. Link to “Hosting Guides” at the World Café Web site and there you will find great guidelines for hosting a café. It is an excellent resource and walks you through your preparations and implementations.

In summary, a host creates context by having small round tables (as if in a café) that have café decorations. The tables have a container for colored pens and markers for participants to write on flip chart paper or large pieces of paper that are on each table for writing, drawing, diagramming, and any other creative expressions. A question or series of questions are posed and people discuss one of them at their table. A table host is selected. When the round of discussion is finished then participants move to another table to address another question or the same question. A table host remains and briefs the new group of some of the previous discussion. The new group can view some of the writings and drawings on the table and perhaps connect ideas and generate new thoughts as a result. After participants have moved for 2 or 3 rounds, they return to the whole group.

At the Thinking Outside the Borders institutes the World Café method was used twice.

In Phoenix, Arizona (2007), Stephanie Gerding (of the Arizona State Library at the time) used the following questions during her session:

- What will Thinking Outside the Borders mean to your library and your community?
- What will you do differently?
- How will you share ideas?
- Describe changes that will happen.
- Share your thoughts, feelings, and dreams.

Stephanie had espresso cups on her tables and small bowls of candy and a small vase of flowers. Her café was very inviting.

At Springfield, Illinois (2005) I asked the question:

- What characteristics and values are needed to be an effective leader in a global, multicultural environment?

I implemented the café method a little differently as described in the performance introduction of this article. Each table had a different textile and I incorporated the use of “talking items” as well.

When the group came back together I recorded their thoughts on effective global leadership. After a few minutes Mr. Edwin Qobose of Botswana offered a word of value. The word was “Botho,” “I am because we are.” He explained that when someone walks into the room we see the “whole” of the person. The person who has “botho” can be effective as a multicultural

leader. Then, another participant, Mr. Mandla Ntombela shared the value of “ubuntu” from South Africa. “I am a person through other human beings.” It was at this moment that I knew we had crossed traditional borders of speaking about global leadership. The World Café method helped us to transcend and get to that place.

Visualization

An example of a visualization exercise is described in the article by Ujala Satgoor and myself in this publication. Visualization is a powerful method that combines resting of the mind, reflection, and imagination. When we are working internationally and discussing many of our country’s issues we also remember, the wars, the natural disasters, the genocide, the poverty, and the conflicts. When we imagine what it would take to make changes or when we remember who has been able to transcend cultural, national, and/or linguistic borders in order to make change in the world, we increase our capacity for inspiration, hope, and skill.


In the visualization exercise described in the article “A Space, A Place and a Time: Locating One’s Self In A Multicultural World,” Ms. Satgoor and I encouraged participants to stop everything, to put their papers down and to imagine the globe, the world, the earth spinning. As Mother Earth spun in their minds, the participants were asked to think of the issues and events throughout the globe, perhaps in the Middle East or perhaps in the Caribbean. They were asked to scan, in their minds, the Americas and the great continent of Asia. What lands were left out? What other lands, countries, regions were of concern to them? What specific events and issues were of concern? They were allowed to “name aloud” these regions or these issues, if they liked. After a silent pause, the participants were then asked to think about who has been able to make change in spite of deeply held values, traumatic events, and relentless issues.

The answers to this question can be very moving. Many of the names offered in the institute were recognizable worldwide, however, we learned of people and leaders in many countries that we knew nothing about before. We also learned that the word “leader” can have negative connotations in some countries and in certain contexts. When we shared in this visualization exercise we knew that cross-cultural learning was truly occurring.

In this exercise, participants were also asked what the specific characteristics of each leader were. Many universal characteristics were shared such as: having vision, being able to persuade, being fair etc. After using this visualization exercise over the years I have also heard the following values shared: acceptance, forgiveness, creativity, imagination, sacrifice, and selflessness.

Conclusion

How we come together is so important. On the surface it is a joy for all of us, across nations, to come together and gather around our shared interest: libraries and library services. However, if we dare to share our differences and to delve into the areas of dialogue where we can gain deeper understanding and insights about one another and one another’s situation, we expand our mental borders and begin to think outside of them. Collectively we are able to practice this type of inclusive dialogue and create a new way to be, work, “become” together. We see and create new possibilities when we hear every voice. Learning how to convene groups, gatherings, and people in an equitable and inclusive way will enhance your global leadership skills.



I express gratitude to the University of Illinois Urbana-Champaign and the Illinois State Library for creating these spaces, places, and times, to practice stretching, expanding, crossing, and transcending borders of every kind.

May our ancestors always be connected.



“Digital imaging projects are complex, time-consuming, and costly. The success of a project is generally in proportion to the time spent in planning the project.”

Planning for Successful Digital Imaging Projects

Alyce Scott

*Digital Imaging Program, Illinois State Library
Coordinator*

Digital imaging technology has become a more practical method of providing a greater level of citizen access to the intellectual content of primary source materials held in libraries of all types around the world. A library digitizing primary source material provides access to its community's cultural heritage. Digitization most certainly increases an appreciation of the material and how it relates to the community and the nation.

Digital imaging projects are complex, time-consuming, and costly. The success of a project is generally in proportion to the time spent in planning the project. To help you avoid some of the pitfalls here are some recommendations and resources for planning a digital imaging project.

Some key components of a digital imaging project:

- Selection
- Standards
- Access

Selection - Issues to consider when selecting material for digitization:

- Collection development plans your library may already have in place
- Intellectual value of the collection to researchers
- Demand from current (or potential) users
- Historical or geographic area covered by the collection
- Has another institution digitized the same, or similar, materials?
- Physical condition of the collection, is the material suitable for digitization? (Issues to consider: will preservation work need to be done prior to digitization; bound volumes should be able to be opened to at least a 90 degree angle to be scanned; maps may need to be significantly reduced to display online resulting in a loss of fine detail and spatial context)
- Copyright permission (if the materials are not in the public domain you MUST have permission from the

copyright owner to digitize the material)

Standards for digitization-

- There are many best practices recommendations for digitizing materials. Remember that these guidelines may require adaptation for particular projects, dependent upon source document characteristics such as font size, photographic detail, and physical size.

The Illinois State Library Digital Imaging Program uses the following best practices for scanning:

Archival images:

- File saved in uncompressed TIFF format
- Printed black & white text or maps: bitonal, 600 ppi
- Black & white photographs: 8-12 bit grayscale or 24-36 bit color, 300-600 ppi
- Color photographs, manuscripts: 24-36 bit color, 300-600 ppi

Access (or display) images:

- File saved in JPEG format, with medium quality compression
- 150 ppi
- 1024 pixels in length

Thumbnail images:

- File saved in Compuserve GIF format
- 72 ppi
- 150-200 pixels in length

Access - issues in organization, management, and delivery of your digital image collection:

- Metadata: cataloging and technical data associated with digital images either embedded or as associated text, crucial for searching and access
- Storage: where will the images reside, will you need to purchase a server? Backup/disaster recovery: two copies of all digital image files are recommended, one stored off-site
- Rights management: copyright notices, licensing agreements, digital watermarking
- Viewing software: will your users need to download a plug-in to view the images?
- Finding aids/indexing: will creation of indexes/finding aids be necessary to assist users in accessing information?
- Reformatting/media refreshing to avoid data degradation: plan ahead, it's inevitable

In closing, it should be noted that digitization is not preservation. While there are elements of preservation involved in the digitizing process, the purpose of creating digital images is to provide access to primary source materials that might otherwise be unavailable to researchers, scholars, and the public.

Resources

Books

Besser, Howard and Jennifer Trant. *Introduction to Imaging: Issues in Constructing an Image Database*. Santa Monica, CA: The Getty Art History Information Program, 1995.

Ester, Michael. *Digital Image Collections: Issues and Practice*. Washington, D.C.: Commission on Preservation and Access, 1996.

Kenney, Anne R. and Oya Y. Rieger. *Theory into Practice: Digital Imaging for Libraries and Archives*. Mountain View, CA: Research Libraries Group, 2000.

Northeast Documents Conservation Center. *Handbook for Digital Projects*. Andover, MA: NEDCC, 2000.

Smith, Abby. *Why Digitize?* Washington, D.C.: Council on Library and Information Resources, 1999.

Web sites

Benchmark for Digital Reproduction of Monographs and Serials (revised January 2002) available at the Digital Library Federation Web site.

Digital Conversion of Research Library Materials by Stephen Chapman and Anne E. Kenney (Cornell University)
(D-Lib Magazine, October 1996 – old but still useful) available at the Digital Library Magazine Web site.

Digital Formats for Content Reproductions (Library of Congress) July 1998 available at The Library of Congress American Memory Web site.

A Framework of Guidance for Building Good Digital Collections (National Information Standards Organization) available at the National Information Standards Organization Web site.

Image Quality Calculator (use to determine the best scanning resolution for your digital images) available at the University of Illinois Library Web site.

Moving Theory into Practice: Digital Imaging Tutorial (Cornell University) available at the Cornell University Library PReservation and Collection Maintenance Web site.

Metadata

Introduction to Metadata (Getty Institute) available at the Getty Research Institute Web site.

Understanding Metadata (National Information Standards Organization) available at the National Information Standards Organization Web site.

Copyright

Fishman, Stephen. *The Public Domain: How to Find & Use Copyright-Free Writings, Music, Art & More*. Berkeley, CA: Nolo Press, 2001.

Copyright (OCLC Digitization & Preservation Online Resource Center) available at the OCLC Web site.

Crash Course in Copyright (University of Texas) available at the University of Texas Web site.

When Works Pass Into the Public Domain, 2003 available at the University of North Carolina Law Library Web site.

Glossary of Scanning and Digital Imaging Terms

Bit

The smallest unit of computing information.

Bit depth (1-bit, 8-bit, 24-bit)

The amount of information (black and white or color) a computer can discern for each bit of an image. 1-bit is black and white (off or on), 8-bit is 256 “shades”, “values” or “levels” of gray or 256 colors, 24-bit is millions of colors.

CD-ROM (Compact Disc-Read Only Memory)

A storage disk for computer files; a CD-ROM can hold about 650 megabytes of data; you cannot replace the information on a CD-ROM as you can on a floppy disk or hard disk.

Crop

To select out an area of an image. Once an image is cropped, save the cropped version with a different name, retaining the original image.

Digital image

A computer file which, when used in conjunction with the proper software, will display a picture on the computer screen or print out to a digital device such as a laser printer.

Dither

A way of arranging the dots in a digitized image that creates an optical illusion of more continuous colors or gray tones than the computer or device can actually display or print.

Download

To “get” a file; to move a file electronically from one place (such as a Web page or server) to your machine (such as onto your hard drive or floppy disk).

Downsize

To reduce the file size of an image, by lowering the resolution and/or reducing the square measurement of the file.

Dpi (dots per inch)

Measure of resolution for a laser printer.

See also: Ppi (pixels per inch)

File format

The specific way digital information is made and stored by the computer. Not all software applications can read and/or manipulate all file formats. (See: GIF, JPEG, TIFF.)

GIF (Graphics Interchange Format)

A common graphic file format on the World Wide Web; used by online services and Web browsing software, GIFs contain information compressed into a relatively small file size and may display faster than other formats.

Grayscale

A system of displaying images in gray tones (or “levels of gray”), simulating the continuous gray tones of a photograph. To achieve grayscale, a monitor must be able to display 2 to 16 bits of information per pixel. This allows the monitor to display a black or white pixel as well as several values between black and white.

Image file size

The amount of computer storage space a file requires; usually measured in kilobytes (K) or megabytes (M, MB, mgs or “megs”). An image file that is 5 x 7 inches, 8-bit gray (as in a black and white photo), resolution 300dpi, is 3M in size. (A floppy disk holds 1.3M.)

Image size

The physical dimensions of the image as measured in the small squares (pixels) of a computer screen; an image filling a “typical” computer screen (13 inch diagonal) would be 640 x 480 pixels; compare to image file size above.

JPEG (Joint Photographic Experts group)

Pronounced “JAY-peg”, a graphic file format that compresses information about many colors (up to 16 million) in the image into a smaller file.

Line art

Black and white art, usually some type of line drawing (such as that produced by pen and ink).

“Manipulate the image”

Change the image electronically in some way—resize, change the resolution, remove color, sharpen, clean up, edit, convert the file format, etc.

Output resolution

The detail and clarity (achieved by closeness of dots) with which the image will be displayed or printed (dependent on the capability of the display or printing device).

Photoshop

Software developed by Adobe, which allows manipulation and editing (enhancing, resizing, cropping, etc.) of digital images.

Platen

The glass surface of a flatbed scanner.

Ppi (pixels per inch)

Measure of resolution for a monitor.

See also: Dpi (dots per inch)

Resize

To change the size of an image by reducing or increasing the resolution and/or the square measurement of the file. [Note: it is not possible to add more data to an image after it is scanned. It is always preferable to scan an image at the size needed rather than to try to increase the size or resolution later.]

Resolution

An expression of image size; the sharpness and clarity of an image, achieved by the closeness of the dots that make up the image. Resolution is expressed for the scanner as samples per inch (spi), for the screen as pixels per inch (ppi), for the printer as dots per inch (dpi). Most people say “dots per inch” when speaking of scanning resolution, (although technically this is not accurate). The more data per inch (samples, pixels, dots) the higher the resolution of the image and the better looking the image will be. Most screens display at a resolution of 72 pixels per inch. Most laser printers print at 300 or 600 dpi. Higher resolution image files are much larger than low resolution image files, so only save a high resolution image if you need to (such as for archiving). You will need a high resolution image if you are going to print the image in a paper publication and/or enlarge all or any part of the image on screen or on paper.

Scanner

A device that takes a picture of an image, breaks it down into dots and records it as a digital file for use with a computer. Some types of scanners are:

- flatbed scanner: A device for converting paper images (photographs, drawings, printed images) into computer graphic files.
- slide scanner: A device for converting 35mm slides into computer graphic files.

Server

A computer on a network that can be accessed by other computers on the same network; a server can hold software for several people to use and/or space for people to save and access files.

Size (see “Image file size”)

TIFF (Tagged Image File Format)

A type of graphic file format developed for scanning. TIFFs are bitmapped graphics that can contain lots of information about each bit or pixel. TIFFs can be read by both Macintosh and PC/Windows applications, such as PageMaker and QuarkXpress. If you think you will ever print your image in a book or publication of any kind, you will want to save a copy of your image as a TIFF. Because TIFFs save a lot of information about each pixel, they can be very large files.

Value

The lightness or darkness of a gray or a color. The darkest level or value of gray is black and the lightest level of gray is white.



“...the central theme is that a library needs to become more open to the input of its users; to become a more participatory environment.”

Library 2.0: Creating a Borderless Library

Michael Sauers

Technical Innovation Librarian, Nebraska Library Commission

Introduction

Library 2.0 is one of those concepts that mean different things to different people. Originally coined by Michael Casey on his blog Library Crunch and further expanded in his book *Library 2.0: A Guide to Participatory Library Service* co-authored by Laura Savastinuk, the central theme is that a library needs to become more open to the input of its users; to become a more *participatory* environment.

By embracing and implementing the themes of Library 2.0 (as I see them, which I'll be presenting in this article,) a library can easily become borderless. But before I can give you specifics, let me explain what I envision as a "borderless library". To most, when they hear the word borderless, they think of national or geographical borders. Although these definitions do have a little to do with what I'm talking about, I don't want to be so literal.

There are many borders when it comes to traditional library service. Whether that border is caused by forcing the user to come into a building in order to have their question answered, or if it's that large piece of wood we call a reference desk creating a barrier between the librarian and the user, borders are all around us. Through Library 2.0 principles, some technological, some not, we can break down these barriers; think outside these borders, and create a better environment for both.

Some feel that Library 2.0 is what they've been looking for. To others it's just a new buzzword that needs to go away. Others feel that we've been doing what Library 2.0 promotes all along and this is nothing new. Some feel that this is less a revolution, and more an evolution in library service. In some ways, they're all right. Whatever you think of the term, the principles are solid and those that embrace them are viewed as leaders in the field today.

So, what are the overall principles of Library 2.0? As I see them they are: beware perfection, be social, and the end of the culture of "no". Let's take a look at what each of these mean and a few examples of how libraries are implementing them.

Beware perfection

Take a look at many of the online services you're using today, I bet many of them have a little "beta" next to their name and/or logo. Google Docs, which I'm using to write this article, is just one example. Even without an official "beta" designation, many online services today are in a constant state of change. Many services now launch while still in an incomplete state. In other words, software is released more often and updated on the fly more than it used to be. The days of "here's the new version" are practically over. As more and more people use services that are constantly changing, they're going to start to expect that constant change in other services such as libraries.

Here's another way to look at it: instead of waiting for some new service or idea to be considered "perfect" or "ready" by everyone that's involved, how about getting to the "functional" stage and then releasing it to the wild. Sometimes, when you give the power to your users, they'll discover things about your product and ways to use that product that you

Sometimes, when you give the power to your users, they'll discover things about your product and ways to use that product that you never would have thought of.

never would have thought of. For example, the photo sharing site Flickr was originally started in 2003 as a social gaming platform. They soon discovered that one particular feature was so popular (photo sharing) that they redesigned the service and the mission to focus on that one smaller feature. The rest, as they say, is history.

So, let's say you've got a great idea for how to better connect with your users. (I'll be giving you a few later on in this article.) Of course, you'll want to include a few others in the approval and implementation process for this idea but instead of planning for perfect, plan for function. Once you've got the basics up and running, let it fly. See where it goes. Let it grow organically. It may soar, it may fall flat. Either way, learn from the experience and take those lessons with you on to the next idea.

Go where your users are

In the introduction to this article I talked about borders and barriers to service. One of my examples was the fact that traditionally we expect our users to come to us in order to avail themselves of our resources. In the past, this has slowly changed with the advent of telephone service, fax service, and more recently e-mail and Instant Messaging (IM) service. However, in each of those cases, we still depended on our users to approach us. Instead, how about we consider going to them.

Going where the users are can be as simple as getting out from behind the reference desk and wandering the stacks asking your users if they need any assistance. The Ivanhoe library in Melbourne Australia has gone further and invested in tablet-based UMPCs (Ultra-Mobile PCs) to provide on-the-spot reference service. I've heard stories of other librarians setting up shop in campus student unions and in local lunch-time restaurants and offering on-site reference services.

Looking into the more technology-based areas, many libraries are setting up pages in popular social networking sites such as MySpace, Facebook, and Beebo. Here libraries are posting information about what's going on in the library, new items in the collection, and even providing reference services. A recent study has said that most college students wouldn't

think of looking for a librarian in these services but they definitely won't find us there if we're not there.

Be Social

In the past the Web was very much based on a broadcast model similar to television though on an admittedly larger scale. A few would learn how to write code (typically HTML) and create Web pages which they hoped others would view and act upon the information provided. Today, the Web is much more social in nature.

The simplest way a Library can be social is to blog. Blogs allow the library to easily share what is going on with their public with a simple point-and-click interface (i.e. no code needed) and they allow their readers to respond to what the library has said through comments. This opens a conversation with the library's users that wasn't previously possible. Whether the blog is a separate web site as it is with the Paper Cuts blog of the Topeka and Shawnee County Public Library in Topeka, Kansas, or integrated with the library's Web site as a whole as with the Ann Arbor Library District in Ann Arbor, Michigan blogs are easily implemented and can become quickly popular with your users. Another great example is the Library Suggestion Blog of the Virginia Commonwealth University Libraries. Here the library is posting the content of user-submitted comment cards and replying to them in a very public manner. Not only does this show that the library is taking comments seriously, but this method also allows other users to submit their feelings on both the suggestions of other users and the library's responses to those suggestions.

Another way a library can become social is to use Del.icio.us Web site to collect and organize their online reference resources. Ten years ago, libraries used their browser's bookmarks to organize Web sites. These, however useful, have many problems the least of which is that the resources are generally tied to a particular computer. Since then many libraries have moved these resource lists to a page on the library's Web site. This is an improvement over bookmarking but still can be problematic since someone must know code and have access to the site in order to add or update the resources. Del.icio.us solves all these problems and adds additional features.

By moving your links off the library's Web site and on to Del.icio.us you solve the access problem caused by bookmarks, and you eliminate the need to know code that was required by listing them on a Web page. The additional benefits include the cross-referencing of your bookmarks with the bookmarks of others, the ability to tag your bookmarks making them easier to find within multiple categories, and in combination with RSS technology, the ability for your users to subscribe to your resources. (For example, a user could subscribe to your "business" tag and receive a copy of every new resource you add to the library's account that relates to business.)

Then, with a little copy-and-pasting of code, libraries can easily link their existing Web site with the contents of their Del.icio.us account. The Holdrege Public Library in Holdrege, Nebraska has done just that. Opening their "Links we love" page gives you a tag cloud; the list of all the tags they've used to organize their bookmarks. The larger the tag, the more it's been used. Just click on a tag and you'll receive the list of all the related resources the library has to recommend.

The third social service I encourage libraries to take advantage of is Flickr. If you're someone who likes to take photographs, and you don't have a Flickr account yet, why not? Think of all the events that occur at your library. Get a digital camera, it doesn't have to be an expensive one, and start taking pictures. Children's events, author appearances, book displays, remodeling and construction, you name it, take a photo of it. Once you've got the photos, upload them to your library's Flickr account. Once they're there tell everyone where to find them. Use the "Blog This" button to easily add narrative and publish the photo to the library's blog. Then, allow your users to add notes to and leave comments about your photos. Lastly, encourage your users to subscribe to your photos via RSS and let them use your photos on their blogs. (With proper attribution of course.)

The End of the Culture of No

Lastly, take a look at the impression you give to your users when it comes to the signs in your library. Does every one of them say what your users can't do instead of what they can do? Do your signs use the word "NO" a lot? Try this: perform a sign audit. Walk into your library and try to view it as a patron would. Read your signs out loud. Do they make your library sound friendly and inviting or like a nanny-state in which your patrons are viewed as the enemy; something that needs to be controlled and scolded.

I don't want to pick on any particular library here so if you're not sure what I mean, take a look at the photographs in the Library Signage Flickr pool and read the comments on some of the photos, especially those that have a lot of comments. The pool contains both positive and negative examples of library signage. Spend about 15 minutes looking through these photos and you'll get the picture.

Conclusion

So, what can you do, starting today to get your library moving toward 2.0? Here's a brief list of steps that you can take starting right now.

- Go to a blogger Web site and start a blog. It doesn't have to be one for the library right now. Get used to it yourself first, then take it up to the organizational level.
- Go to the Flickr Web site and sign up for an account. Even if you don't have any photos to upload right now, use it to explore and see how libraries are taking advantage of it. Join the Libraries and Librarians group and join in on the discussion.
- Perform a sign audit on your library. Take down every sign that tells your users what they can't do or contains the word "NO" and recreate the sign in a more positive manner.
- Think about a project you're working on right now. Ask yourself: Is it functional? If the answer is yes, let it go and let others play with it. It may not yet be perfect but you never know what your users may come up with.
- Think of a few places where you might find users. Maybe it's MySpace. Maybe it's the pub across the street. Think about how you might be able to work within those environments to provide library services.



“We immediately saw the power of extending the Thinking Outside the Borders experience beyond the institutes by way of partnership projects.”

“The Institute was Great, but Now What?”

Partnership Projects

Dawn J. Cassidy

Director of Circulation Services, The Urbana Free Library, Urbana, Illinois

Title at Mortenson: Training and Technical Assistance Coordinator, August 2005–August 2007

Introduction/Context

“The institute was great, but now what?” The participants in the first Thinking Outside the Borders institute established connections with each other and forged new relationships, but there was no formal mechanism in place to keep these connections going and practice the skills learned. Just as momentum built, the institute ended. As planning for the second institute got underway, this question stood out as key to improving the participants’ experience and adding long-term value to future institutes. We immediately saw the power of extending the Thinking Outside the Borders experience beyond the institutes by way of partnership projects.

During the second institute, pairs of librarians would brainstorm and then design a project to link them professionally after the institute ended and establish connections between their institutions. The projects would allow participants to:

- practice the communication skills learned at the institute
- get to know someone from another country more closely than just during the institute’s sessions or social opportunities
- learn more about a specific library setting in another country
- appreciate each others’ knowledge and the unique challenges faced by their partner
- get inspired to try something new in their own library, and
- involve their colleagues and thus enrich the project.

For the Mortenson Center, the partnership projects provided us with a way to keep in contact with participants after the institute and assess the lasting value of the content. We felt strongly that deepening the connections beyond the institute would enhance the experience and would better prepare future library leaders to work successfully in a global library environment.

Prior to the Institute

Once all of the participants had been selected and invitations to attend accepted, we sat down to pair up the participants for their partnership projects. Rather than randomly stick people together, we tried to find natural connections (e.g., technical services librarians with other technical services librarians, academic librarians with other academic librarians, librarians from small institutions with other librarians from small institutions, etc.). With common areas of interest, it seemed there would be a natural context from which to develop a mutually beneficial and interesting project. The American Library Association's (ALA) Sister Library Initiative provided ideas about directions the projects might take. With limited time within the busy institute schedule to design the projects, it was essential to give participants starting points that would get them thinking creatively and quickly. (See Appendix A: Possible Activities for the Library Partnerships.)

We also created the Library Partnership Agreement form to give participants a structure around which to organize their ideas (see Appendix B). On the form, participants needed to:

- describe the partnership activity;
- delineate the steps to implement the partnership activity, including a timeline;
- divide the responsibilities (determine, in writing, who would do what); and
- determine who else from each institution needed to be involved.

The form ensured participants took each of these factors into account and kept the scope of the project realistic. The final key part of the form was a signature line for each participant. The signature would, in theory, give them reason to take the project seriously and foster a sense of commitment to move it forward that might otherwise be missing. Including email addresses after the signature line put everything participants needed on one document—they did not have to search through masses of institute materials and handouts to find contact information for their partner.

During the Institute

We gave participants several opportunities to meet with each other and determine the direction for their projects. On the first full morning, we introduced them to the Partnership Projects and the rationale behind them. We also distributed the partner assignments, the sheet of possible activities for the projects (Appendix A), and the Library Partnership Agreement forms (Appendix B). We wanted to introduce the topic as early in the day as possible for several reasons:

1. The first official “planning session” would not occur until later that evening.

2. Participants could take advantage of any down time during the day's activities to look at the materials and begin to think of ideas.
3. Participants also could seek out their partners during free time or meals and begin to get to know each other.

We purposely inserted formal project planning sessions into the institute schedule to allow their ideas to take shape. These informal sessions took place in the evening, and the project coordinator always attended in case participants had questions or wanted to get feedback on their ideas. One session took place the evening of the first full day; the second the evening of the second full day. Participants knew they would be expected to stand and present their ideas to the full group during a special session on the final day. Participants showed a lot of interest in the project ideas, making for a lively presentation session.

After the Institute

Keeping project momentum going after the institute proved challenging for everyone involved. The participants returned home and to work after a significant absence (especially the international participants, who had been away from home the better part of three weeks). That absence meant multiple tasks and priorities competed for their attention. We needed to keep the partnership projects at the forefront of their minds to give them the best chance for success.

Immediately after the institute, we compiled a list of project summaries and created a PDF document that we emailed to all participants within two weeks of the institute. We hoped the document, which used the Mortenson Center logo and consistent formatting to create an official look, would attract their attention through the everyday clutter and thus keep the projects going. Timeliness (within two weeks) was crucial to remind them of their commitment in the midst of competing priorities.

We also offered to arrange a meeting time with the project coordinator for anyone attending the ALA Midwinter Conference, which occurred about two months after the institute. Such a meeting offered, at least, any librarians in attendance the opportunity to check in and discuss any problems or challenges they encountered. Unfortunately, very few of the United States librarians who participated in Borders even attended the conference. Ideally, there would not have been such a stretch of time in between contacts between the Mortenson Center and participants. However, the institute was held in the month of November just preceding the United States Thanksgiving holiday, Christmas, New Year's, and for many institutions, an extended holiday break that went well into January of the following year.

Approximately three months after the institute, we checked in with the participants again via email to get a progress report on the partnership projects.

We asked the following questions:

1. How are things going with the project so far? Please tell us what progress or accomplishments your partner and you have made on the project.
2. If your partner and you have been encountering challenges either in starting up or in implementing the project, what are those challenges?
3. What strategies will your partner and you use to address the challenges or continue the

progress?

4. How are your partner and you maintaining communication? How frequent is that communication?
5. How was the idea of doing a project with an international partner received by the administration of your library?
6. Do you have any other comments about the Partnership Project?

Of the 32 participants, 20 responded to the questions (8 United States librarians and 12 international librarians). Most were having some difficulty in maintaining the project or communication, and several cited problems with their library's administration—either outright objections or complete apathy. Lack of time and funding seemed to be the largest obstacles of all. However, several projects had taken hold, and even one that had yet to get underway had hope because of a developing friendship between the participants.

Formal communication between the Mortenson Center and with participants ended at that point for several reasons; most importantly because of my maternity leave. However, additional follow-ups may not have been necessary or welcomed. We felt sensitive to the possibility of being perceived as “pushy” or putting additional pressure on already busy professionals by continually following up. At that point, we decided, either the participants would be committed and continue the projects, or wouldn't. It was up to them.

Summary/Conclusion

Even with the best of intentions, many things can get in the way of successful long-term international partnership projects. In order to maximize the chance of success, participants (and project coordinators) must keep the following in mind:

1. **Keep project scope realistic.** Overly ambitious goals have greater chance of failure. Consider starting with something extremely small and build on its success to move toward larger, more demanding projects.
2. **Avoid time-sensitive projects.** Emails may be delayed, lost, or deleted. Holidays, vacations, and life events happen that take people out of the library for extended periods of time. Participants must be able to put the project down/away for a while and still be able to pick back up. (Try not to begin projects right before a built-in break, such as the Christmas holidays. In some countries, some libraries and campuses close for over a month!)
3. **Make regular contact with the partner to keep momentum going.** Regular contact does not have to mean frequent (monthly seems to work).
4. **Get support of the library's administration.** Participants must be able to show administrators how the institution will benefit from the project and how it will further the institution's mission and/or goals.
5. **Avoid projects that require using personal or institutional funds.** One way to avoid this trap is to build on a project within the institution that has already been funded, or even better, requires no money at all!

6. **Find a topic/area/goal of high interest to both participants.** Passion about the project will keep things going during the difficult times.
7. **Find a topic/area/goal of interest to participants' colleagues.** Getting someone else excited and committed to the project will increase the chances of success and sustainability, and will give the partner another contact person to work with when the main partner is unavailable.
8. **Make initial agreements as detailed as possible.** Participants will foresee many of the obstacles and will be able to hit the ground running instead of trying to formulate a workable plan over long distances.
9. **Determine if the project coordinator should stay involved.** Involvement could mean copying the coordinator on email exchanges, asking for advice, or even arranging additional in-person or electronic meetings, if logistically possible. Both partners must agree to take this step.
10. **Recognize email's limits.** While convenient and not bound by time zones, email may never get through, be deleted, or be overlooked in a crowded Inbox. Participants should get creative in using other ways to stay connected, depending on what's appropriate for the project (Project Web site? Blog? Shared work space over the WWW? Wiki? Internet phone?, etc.).

The tremendous benefits and rewards of international library partnership projects make the effort worth it. We hope anyone planning their own Thinking Outside the Borders institutes will consider adding a partnership project or some other way to maintain and build on the relationships developed during future institutes.

Mortenson Center
Thinking Outside the Borders
Fall 2006

Library Partnership Project Summaries

- Create a virtual pen pal program to connect Dominicans studying English and Americans studying Spanish. While exchanging emails both pen pals will have the opportunity to improve their language skills, learn about other another culture, and make new friends.
- Exchange staff newsletters and organize a pen pal program in order to help staff members learn about different cultures. This exchange could lead to a short-term staff exchange or visits to partner libraries.
- Start a pen pal program and make display cases about each other's libraries. Their goal is to create a formalized sister library program between the two libraries so they can exchange information about technology and librarian experiences.
- Share information between Alberta and Costa Rica in regard to authors, books, reading lists, music titles and artists, and newsletters. They will share via email and hope that the sharing will promote cultural learning in both libraries.
- Exchange free-access electronic information between the two universities. They will exchange information about their libraries' profiles and define information needs at both institutions.
- Build a digital collection depicting the historical reality between the two home cities. The collection of photos will depict scenic videos, historical figures, and other local events during the early years of the twentieth century.
- Develop a concept paper to educate/teach educators about information literacy and computer literacy

skills, assist in the development of the school resource center, and create a link between U.S. high school students and South African high school students.

- Exchange useful materials and information, including information on Spanish language development and information on American library science education. These materials will be exchanged digitally whenever possible.
- Exchange suggestion lists for books to purchase, including popular authors who are writing in Spanish and popular North American authors who have been translated into Spanish for leisure reading.
- Exchange experience and expertise in two areas: In collections, they will focus on materials for the gay, lesbian, bisexual, and transgendered (GLBT) community and for the East Indian community. In training, they will focus on reference and computer skills.
- Explore the possibility of arranging a library visit to the American library for a master's student who is enrolled in the LIS program at the Mexican library and a reciprocal visit to Mexico by a librarian from the American library.
- Share institutional concepts for assessment criteria, development of assessment instructions, and development of tools for data collection. This exchange will help them assess librarian teaching at their own institutions.
- Prepare library presentations in order to share complete information about each other's library services and collections. The presentations must be designed with the same components for comparison purposes, and may culminate in a librarian exchange program between the two universities.
- Exchange materials and share information. They will explore ideas of how the two libraries could work together to support rural library development in Costa Rica.
- Set up an exchange of books and materials between the two libraries. By exchanging materials both institutions will become more culturally aware while meeting information needs.

Possible Activities for the Library Partnerships

- Organize a pen pals program for library staff and users to learn from and about each other.
- Initiate contact via email to discuss issues and concerns.
- Arrange to exchange displays of books and cultural materials.
- Arrange for interlibrary loan to facilitate document delivery between libraries.
- Donate useful books or journals.
- Exchange local newspapers, cultural materials, bibliographies, artifacts and displays of interest.
- Offer to assist in purchasing materials that are difficult to find in the other country.
- Provide assistance at local professional meetings attended by staff of the partner library.
- Exchange staff newsletters.
- Create a bulletin board display with photos of your partner library, its staff, and users. Send a scrapbook, slide presentation or videotape of your library to your partner library.
- Publicize your partner library status via your library newsletter and at speaking engagements with community groups that have an international focus. Provide interviews and photo opportunities with local media.
- Share joint activities as part of a summer reading program.
- Start a “one book, one city” project where both libraries promote reading of a particular book and share programming ideas and activities.
- Set up an evaluation mechanism to help both libraries celebrate their successes and learn from their mistakes.
- Arrange for short-term exchanges of professional staff.
- Organize a delegation of staff and community members to visit your partner library.
- Other ideas? Use your imagination!

Note: Many of these partnership ideas were borrowed and/or modified from the Sister Libraries Program of the American Library Association © Copyright 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006 American Library Association.

Appendix B

Library Partnership Agreement

Description of partnership activity:

Steps in implementing partnership activity, including timeline:

- 1.
- 2.
- 3.
- 4.
- 5.

Division of responsibilities (who will do what):

Who else from your institutions needs to be involved?

Signature

Date

Email address

Signature

Date

Email address



“Finally, our world is small and our lives are so linked together. It is within all of us to ‘Think Outside the Borders.’ It is an enriching experience.”

Keep Thinking Outside the Borders!

Jean Wilkins

Retired Director, Illinois State Library (1999-2004)

If you have read this publication, I trust the enthusiasm, exchange of ideas on many subjects and the implicit good will come through the pages to you. All of us must acknowledge and understand that differences are part of our world. At the same time we will find opportunities to work, to celebrate our lives, libraries, and the world around us.

Skilled leaders are paramount to the success of all organizations. In my tenure as Director of the Illinois State Library, providing opportunities for leadership training was important to me. I was drawn to participating in the Institute of Museum and Library Services grant proposal as a partner with the Mortenson Center at the University of Illinois, when I saw the possibilities not only for my own state but for our partners in both the U.S. and other countries. Bringing together a group of international librarians for discussion and learning opportunities centered on leadership strategies provided a unique opportunity not to be missed.

The Thinking Outside the Borders institutes were affirming events for attendees. There was time for conversation that led to discussions of work, family, home, and community activities. Relationships don't happen instantly but coming together in the setting provided by Thinking Outside the Borders institutes is a necessary first step in building trust and establishing commonality. There were many possibilities for partnerships, collaboration, and most importantly, friendship. The Illinois, Arizona, and Nebraska institutes led to associations that will go on past the life of the IMLS grant. Indeed, those relationships are central to the goals of the project. Building relationships one at a time is vital to understanding each other. We can, then, celebrate commonality.

What did I take away from my institute experiences?

The Mortenson Center partnership with the Illinois State Library provided a setting for meeting librarians from Europe, Africa, South America, Japan, and Vietnam. Almost always, the visitors had an opportunity to spend

time in my home town, attend a variety of community functions, and get to know their host families. We had time to talk about library issues we had in common and develop the relationships that are necessary in our shrinking world. Currently, I'm participating in activities and organizations that provide opportunities to meet people from outside the United States. The partnership caused me to "Think Outside the Borders."

Here are some learning tips I re-committed to, following my involvement with the Thinking Outside of the Borders project:

- Be an agent for change in your organization. Form a partnership with a library outside your own country. It will expand the horizons of your staff.
- Don't limit your partnerships only to libraries. Cultural institutions, service organizations, schools, colleges and universities and local governmental groups are all possibilities.
- Create your own "Outside the Borders" institute by developing some relationships and then appropriate programs with a community other than your own.
- Join an organization that has international programs and the possibility of meeting people from outside your own country.
- Invite international visitors to come to the library. They will welcome the opportunity to learn about you and the community.
- Make use of technology to go "Outside Your Borders."
- Survey the staff and make use of their skills to broaden the scope of the library. Does anyone on the staff speak more than one language? Does the library have staff that travel outside the country? Can they use their experiences for programs or to host visitors to the community?
- Talk about the people you've met and the relationships formed during a "Thinking Outside the Borders" event. Encourage your colleagues at home to do the same.
- Use and refer to this training booklet often. The writers who were also presenters designed their sections with you in mind and with the hopes of guiding us as well as expanding our international leadership skills.

Finally, our world is small and our lives are so linked together. It is within all of us to "Think Outside the Borders." It is an enriching experience.

Best wishes and thanks to all who contributed to this project!



Contributing Authors

Sandra Ríos Balderrama, RíosBalderrama Consulting,
Fresno, California USA

Carol A. Brey-Casiano, Director of Libraries, El Paso
Public Library, El Paso, Texas USA

Clara Budnik S., Executive Director, Directora Ejecutiva,
Foundation for Democracy and Development/Fundación
Democracia y Desarrollo, Chile

Dawn J. Cassady, Director of Circulation Services, The
Urbana Free Library, Urbana, Illinois USA

Thomas F. R. Clareson, Director for New Initiatives,
PALINET, Philadelphia, Pennsylvania USA

Anne Craig, Director, Illinois State Library, Springfield,
Illinois USA

Kathryn J. Deiss, Content Strategist, Association of
College and Research Libraries, American Library
Association, Chicago, Illinois USA

Barbara J. Ford, Director, Mortenson Center for
International Library Programs, University of Illinois at
Urbana-Champaign, Urbana, Illinois USA

Debra Wilcox Johnson, Johnson & Johnson Consulting,
Waunakee, Wisconsin USA

Paula Kaufman, University Librarian and Dean of
Libraries, University of Illinois at Urbana-Champaign,
Urbana, Illinois USA

Bonnie Matheis, Illinois Center for the Book and
Mortenson Programs Coordinator, Illinois State Library,
Springfield, Illinois USA

Mary Ann Mavrinac, Chief Librarian, University of
Toronto Mississauga, Mississauga, Ontario, Canada

Joe Natale, Executive Assistant to the Director for
Planning and Outreach, Illinois State Library, Springfield,
Illinois USA

Julie Page, Co-Coordinator, California Preservation Program, and User Services, Western States & Territories Preservation Assistance Service, California State Library, Sacramento, California USA

Elizabeth Pierre-Louis, Library Program Coordinator, Fondation Connaissance et Liberte, Open Society Institute, Port-au-Prince, Haiti

Ujala Satgoor, Deputy Director, Special Units Library Services, University of Pretoria, Pretoria, South Africa

Michael Sauers, Technical Innovation Librarian, Nebraska Library Commission, Lincoln, Nebraska USA

Susan Schnuer, Associate Director, Mortenson Center for International Library Programs, University of Illinois at Urbana-Champaign, Urbana, Illinois USA

Alyce Scott, Digital Imaging Program Coordinator, Illinois State Library, Springfield, Illinois USA

Thomas H. Teper, Associate University Librarian for Collections, University of Illinois at Urbana-Champaign, Urbana, Illinois USA

Jean Wilkins, Retired Director, Illinois State Library, Springfield, Illinois USA