December 2013

Building Global Library Leaders:
An Evaluation of the Mortenson Center for International Library Programs

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INTRODUCTION

Over the past five years, the Mortenson Center has largely achieved its goal to equip librarians to lead and innovate in their libraries and to better serve the needs of their communities. The Center's programs build participants' skills and confidence, and prepare them to become leaders inside their libraries and beyond. The Mortenson Center helps meet a critical need for librarian leadership training, and its experienced staff runs relevant, high-quality programs. As anticipated, the Mortenson Center has been most successful at achieving its outcomes where its influence is most direct—with its librarian participants. While many of its participants have introduced new services at their libraries and adopted a more customer-driven approach, the Mortenson Center has been limited in its ability to more broadly change how libraries are run or how communities interact with libraries. The Center will likely continue to have the most impact on its librarian participants going forward, and will likely have less impact in areas it touches indirectly, but it can modify its programs to increase the likelihood that more participants will assume leadership roles in their libraries and communities upon returning home.

CONTEXT FOR THIS EVALUATION

The Mortenson Center's training programs seek to strengthen the leadership and librarianship skills of librarians from around the world and to enable them to improve their libraries and communities. This evaluation assesses the impact of its two main types of programs: **Associates programs** and **country- or region-specific programs.** Associates programs are annual, month-long training programs hosted at the Mortenson Center at the University of Illinois, Urbana-Champaign. They typically provide a survey of communications, leadership, and related training for library professionals. Other programs are usually country- or region-specific trainings that the Center customizes in format and focus to meet the specific professional development needs of the participating library professionals.

Over the past year, Arabella Advisors has worked with the Mortenson Center's staff to develop its theory of change and clarify its goals and expected program outcomes. Its theory of change outlines the program's intended short-term, interim, and long-term[1] impacts at three levels: individual librarians, libraries, and their communities (see Appendix B). Guided by this planning work, this evaluation provides data and analysis describing the Mortenson Center's impact at each of the three levels, as well as the effectiveness of its program implementation. It concludes by identifying opportunities for strengthening the program for continued impact in the future.

> **Evaluation Research Goals**
>
> 1. Assess the extent to which the Mortenson Center has achieved the outcomes it seeks and how it has achieved those outcomes.
>
> 2. Determine which aspects of the Mortenson Center's program implementation contribute most to creating the outcomes and impact these programs yield.

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[1] Short-term is defined as within one year of a Mortenson Center training, interim is between one and five years, and long-term is more than five years after training.

SUMMARY OF KEY FINDINGS

The Mortenson Centers' programs are highly effective, and the Center is largely achieving its desired outcomes for librarians. The Mortenson Center's programs have relatively less direct impact on the libraries to which those participants return, and even less impact on the communities in which those libraries are located, although evidence shows that it is having some effect even at this level. In summary, key findings are:

- **Impact on Librarians:** The Mortenson Center has had the greatest impact on individual participants, enhancing their skills and confidence, building their knowledge of best practices, positioning them as resources for their colleagues, expanding their professional networks, and preparing them for leadership opportunities.

- **Impact on Libraries:** Many of the Center's participants applied the skills and confidence they built during training in their libraries, introducing new programs and a greater focus on customer service. However, the Mortenson Center's programs have had limited ability to more broadly shift how participants' libraries operate.

- **Impact on Communities:** Mortenson Center training has shifted librarians' attitudes about their role in their communities and encouraged them to adopt a more user-driven approach to their work, but there is limited evidence that it has shifted community members' perceptions and use of their libraries.

- **Factors Contributing to Impact:** The Mortenson Center's experienced staff provides relevant, practical trainings that fill an unmet need for librarian leadership training. Together these factors contribute to participants' satisfaction, as well as the Center's strong reputation and impact.

> *"There are other international trainings on libraries, but this is the premier one on librarianship."*
>
> *— Mortenson Center Partner*

- **Opportunities to Increase Impact:** The Mortenson Center has opportunities to deepen its impact on individuals and increase its chances of impacting libraries and communities by making several adjustments to its programs, operations, and communications.

SUMMARY OF METHODOLOGY

In addition to the evaluation planning work described above, this evaluation is informed by four types of information sources: interviews with Mortenson Center program participants, partners, and experts in the library training sector; a survey of Mortenson Center participants, administered in three languages; analysis of Mortenson Center documents; and external research on the library training sector. Data from the interviews and survey were self-reported. For more information on methodology, see Appendix A.

REVIEW OF THE MORTENSON CENTER'S IMPACT

Research Goal #1: *Assess the extent to which the Mortenson Center has achieved the outcomes it seeks and how it has achieved those outcomes.*

By providing relevant, high-quality trainings and exposing librarians to best practices in librarianship, the Mortenson Center has achieved many of its desired goals related to developing librarians into leaders over the past five years. It has seen its greatest successes in building librarians' confidence and leadership skills and in shifting their attitudes and behaviors to better align with best practices in modern, user-driven libraries. These shifts have led in some cases to changes in how participants' libraries operate and how community members engage with these libraries.

IMPACT ON LIBRARIANS

> **Overall Desired Outcomes for Individual Librarians:** *Participants gain knowledge, skills, and a network of colleagues that equip them to lead and innovate.*

Over the past five years, the Mortenson Center has achieved its interim goal of equipping librarians to lead and innovate in their libraries. Mortenson Center trainings prepared librarians to take on additional responsibilities in their home libraries and built participants' confidence to see themselves as leaders and innovators in the library sector. Specifically, Mortenson Center programs have impacted library leaders in five key ways: enhanced their librarianship skills, increased their knowledge of best practices, positioned them as resources to their colleagues, expanded their professional networks, and prepared them for leadership opportunities. The Center has been less successful in helping participants consistently advance into leadership or management roles in their libraries, an indication that the Center has the most impact in areas where its influence is most direct: librarians' skills, attitudes, and behaviors.

Enhanced Skills & Confidence

> **Specific Desired Outcomes for Individual Librarians:**
> ◆ *Have increased knowledge of leadership style*
> ◆ *Gained skills in management, advocacy, new technology, and communications*

Mortenson Center alumni report that the trainings enhanced their librarianship skills and confidence as emerging leaders, enabling them to more effectively communicate with their colleagues and improve their leadership and management styles. The Mortenson Center improved participants' skills in the five main focus areas of its programs: communications, management, new technologies, library advocacy, and fundraising. On average across all five categories, 78 percent of participants who responded to the survey reported that their skills in these areas improved or significantly improved. They reported the greatest improvements in communications (83 percent improved), management (82

percent improved), advocacy (80 percent improved), and technology (80 percent improved). Participants in interviews likewise reported improvements in their communications and management skills, two types of skills most library professionals have the opportunity to apply in their day-to-day work.

In contrast to the significant gains in four of the skills areas, Mortenson Center participants reported fewer gains in fundraising skills. Only four in ten respondents overall indicated that their fundraising skills improved as a result of the Mortenson Center training they attended. Notably, not all trainings included specific sessions on fundraising or grant writing. What's more, many participants either are not in a position to fundraise in their libraries or work in libraries and communities where the fundraising practices featured in the training are not relevant. Simply put: not all librarians or libraries have a need for the sort of fundraising skills these programs are designed to build.

Figure 1

Improved Skills by Type of Mortenson Center Program

	Communications		Management		Technology		Advocacy		Fundraising	
	Associates	Other	Associates	Other	Associates	Other	Associates	Other	Associates	Other
	77%	89%	87%	79%	84%	73%	84%	78%	50%	32%
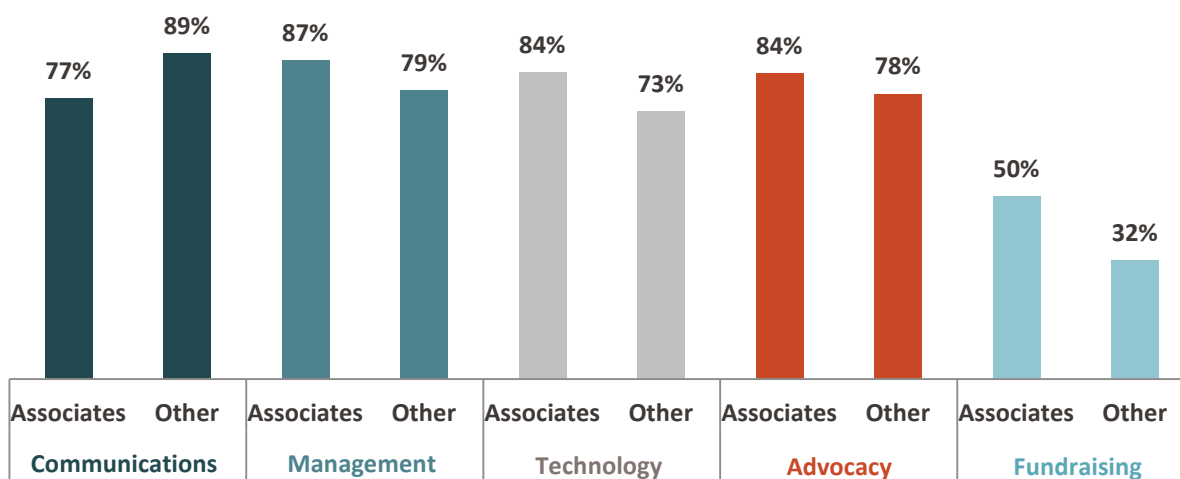
The interviews and document review suggest that Associates programs were slightly more impactful than the country- and region-specific programs in four of the five main skills areas. As shown in Figure 1, Associates reported higher gains in management, technology, advocacy, and fundraising, while participants in other programs improved their communications skills more. The most significant differences were in fundraising and communications; half of Associates reported improved fundraising skills compared to only one-third of country-specific program participants. This difference in skills gains is in part attributable to program content: most Associates programs included sessions on fundraising or grant writing, whereas other programs focused more narrowly on the specific needs of that country or region and did not necessarily address all five of these main skills areas.

While Associates demonstrated higher gains in four skill areas, participants in country-specific programs had more significant gains in communications skills. Multiple country-specific programs included opportunities to put communications skills to use during the training through targeted group projects or

activities. For instance, as part of the 2011 Romanian Program, participants worked on team projects throughout the training and implemented coordinated projects in their individual home libraries that required them to put communications theory into action. Interviewees suggested that these opportunities to apply the communications skills they were building during training reinforced them.

Both survey and interview data also indicate that, in addition to strengthening their skills, many participants felt more confident in their leadership abilities and viewed themselves as changemakers in their libraries as a result of attending a Mortenson Center program. For example, after participating in the 2010 Tech Training program, one participant described feeling "free" and less afraid to recommend and initiate changes in her library. Another explained how the training boosted her confidence and empowered her to more effectively communicate the value of the library to senior leadership at her university. This participant's efforts ultimately led university administrators to grant her library priority access to electricity during power shortages (which were regular occurrences), which signaled to the university community that the library was a valued resource. The Mortenson Center also motivated some participants to be more ambitious in their career goals. A 2013 Associate described her experience: "With my background in Mortenson Center, I can see something bigger….I can take on more senior positions in the library. I am 100 percent sure after this experience that I need to look for something bigger in my career. I was first in a box, and now I've seen the world."

> *"The Mortenson Center didn't just develop the academic side of my professional life, but also the personal skills that I use in very practical ways to enlarge my communications styles, library information skills, and now nominated to be in a leadership position."*
>
> *— 2008 Fall Associates Program Participant*

Increased Knowledge of Models and Best Practices

> ### Specific Desired Outcomes for Individual Librarians:
> - *Have strategies to assess the needs of their library communities*
> - *Have identified changes to be made in home library*

Training sessions and library visits exposed Mortenson Center participants to new ideas and best practices for how to effectively manage their libraries and proactively respond to patrons' needs, which boosted many participants' confidence and activated their drive to make changes in their libraries. Participants were overwhelmingly satisfied with their visits to other libraries, where they learned first-hand how modern libraries operate and were exposed to new ideas that they could potentially implement in their home libraries. A Mortenson Center partner described how the library visits were reinvigorating, inspiring him and others from under-resourced libraries who have felt "trapped" in thinking that their libraries cannot change or improve. Participants who traveled to the United States for the

> *"Part of the drive I have now is what I learned in the Mortenson Center because we went to different libraries…what I learned there is keeping me going now. [W]e are bringing new ideas and new technologies into the library."*
>
> *— 2010 Tech Training Program Participant*

first time to attend the Mortenson Center training were especially motivated by the tours to university and public libraries. As one partner shared, seeing how libraries creatively met users' needs—by, for example, buying a library pet for a children's library—inspired the librarians in that cohort to consider ways to implement changes that would make their libraries' services better align with patrons' needs. Many other participants introduced new services and improved the way they communicated with colleagues as a result of these training sessions and library visits.

> *"You can get trapped in thinking that it can't work. Seeing places where it's successful is inspiring and motivating to librarians."*
>
> *– Mortenson Center Partner*

Expanded Networks

Specific Desired Outcomes for Individual Librarians:
- *Are connected to a network of Mortenson colleagues*
- *Utilize network of colleagues to consult with and share knowledge about best practices*
- *Take leadership roles in the library community in their country*
- *Are active participants and leaders in a network of colleagues*

The Mortenson Center trainings introduced participants to an international network of ambitious, dedicated leaders who serve as mentors and resources to one another. Aside from the program's content and prestige, one of the primary reasons librarians chose to participate in a Mortenson Center program was to meet other librarians and leaders in the library sector. A participant in the 2011 Summer Associates Program explained that she was less interested in the core topics of the training compared to the networking opportunities the training posed, and concluded that building these relationships was the most meaningful part of the program for her personally and professionally. Another participant, a librarian who attended the 2009 Fall Associates Program, shared how she made "lifelong friends" in the program with whom she continues to be in contact. Alumni continue to communicate with one another through social media and email. These relationships foster the sharing of resources and best practices and build mutual support among alumni in pursuing their professional development goals. For instance, a 2013 Associate said that a fellow participant shared resources with her to prepare for her master's thesis this year, and will give advice in preparing her PhD proposal next year.

> *"The best part of the Mortenson Center training was the connections I made. Hands down. Now if I don't know something, at least I know who I can connect with to improve my work and education. In one month, you have the opportunity to meet people from different parts of the world. During a conference, you have a chance to talk with others but not really get to know them."*
>
> *– 2013 Summer Associates Program Participant*

While building relationships with other library professionals in the Mortenson Center network is an important byproduct of the trainings, research shows that, for many participants, the Center's more meaningful impact has been to motivate them to more deeply engage in their local library networks. According to the survey, over half of respondents became more involved in library professional networks and associations after their trainings, and one-third took on a leadership role in a professional

network. In many programs, the Mortenson Center directly engaged with library associations—such as the American Library Association,—demonstrated to participants the value of being part of professional networks, and made clear to them the value they could add to professional associations. For instance, a public librarian who attended the 2012 Summer Associates Program described how the training built her confidence and prepared her to speak up in her local library association's meetings (which were previously dominated by academic librarians) and to present at the association's annual conference. In another case, a 2008 Fall Associates Program participant credits the prestige he earned from participating in the Mortenson Center training for his selection as president of a regional international library association. Many other participants presented at conferences or in their library associations, an indication of their elevated stature and leadership in their local library sector.

Figure 2

2011 Romanian Program vs. Participants Overall

■ 2011 Romanian Program ■ Overall
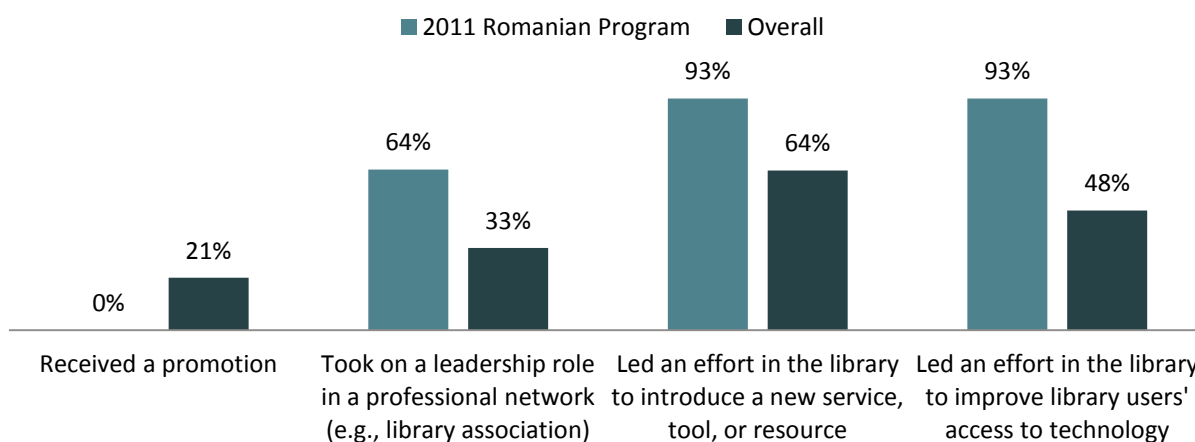
Note: 14 respondents to the survey attended the 2011 Romanian Program

The data overall suggest that participants in Associates or other programs were equally likely to take on leadership roles in professional networks, yet one program – the 2011 Romanian Program – stood out for its outsized impact in empowering alumni to serve as leaders in library associations. As shown in Figure 2, librarians who attended the 2011 Romanian Program were almost twice as likely to take on leadership roles in professional networks (64 percent) versus respondents overall (33 percent). Participants in this program reported that IREX, Mortenson Center's local partner for this program, followed up with them after training to encourage them to share what they learned in the training with their colleagues and local library associations. According to program participants, having the opportunity to share lessons learned from the training positioned them to advance into these leadership positions by highlighting their skills, knowledge, and networks.

Positioned Librarians as Knowledgeable Resources

> **Specific Desired Outcomes for Individual Librarians:**
> ◆ *Use improved management, advocacy, technology, communications, and fundraising skills to advance the library and to support professional development of colleagues*

As a result of attending a Mortenson Center program, alumni are positioned to serve as knowledgeable resources to their colleagues and credible leaders in the library sector. The majority of alumni who responded to the survey (61 percent) shared what they learned with their colleagues in formal or informal ways, and most others (31 percent) plan to do so in the near future. Participants shared the lessons learned from the Mortenson Center training informally by modeling their improved communications, management, and other core skills in their day-to-day work. A 2011 South African Program participant felt that she was better able to manage new services and spaces in her library and to more effectively communicate with coworkers by applying the management and communications strategies she learned at the Center. In some instances, participants shared what they learned in more formal ways, such as in workshops with their colleagues or presentations to local library associations. At least six interviewees presented to other library professionals either on topics they learned at the Mortenson Center or on new services they implemented in their libraries since their trainings, and in 2013, participants in the Center's Romanian programs published a book on serving the community, including in it tools and frameworks to which they were exposed at the Center.

While many alumni have conducted informal or formal training with their colleagues and networks, data on the "ripple effect"—the extent to which these trainings have resulted in improved skills or tangible behavior change among colleagues— is inconclusive, and this was not a main focus of this evaluation. Certainly alumni have exposed thousands of additional library professionals to Mortenson Center topics and skills, yet there is limited evidence to suggest that participants' efforts to share and train others has resulted in the widespread adoption of new behaviors or practices by their colleagues. Rather, the evidence from this evaluation suggests that the most significant result of these trainings is that alumni themselves are positioned as knowledgeable leaders. For example, one participant from the 2008 Fall Africa Group led a seminar for all staff in his library, which not only exposed his colleagues to the management and technology topics and resources he shared, but also positioned

> **2,559+**
> **Library Professionals Indirectly Exposed to Mortenson Training**
>
> About one quarter of Mortenson Center participants who responded to the survey reported the number of people they trained on Mortenson Center topics. Together, these 29 individuals shared materials or resources related to Mortenson Center topics with 2,559 of their colleagues, or 40 colleagues each on average. Six of these respondents trained 100 or more colleagues. Since this total includes only participants who reported the number of colleagues they trained, participants from the Mortenson Center's 2008-2013 programs have likely trained even more than 2,559 colleagues. It is also important to note that, in addition, many other participants shared materials and lessons more informally with their colleagues and networks.

him as the go-to resource for new technologies in the library. The Mortenson Center can continue to position alumni as knowledgeable resources by preparing them to share what they learn at trainings with their peers and networks.

Prepared Librarians for Leadership Opportunities

> **Specific Desired Outcomes for Individual Librarians:**
> ◆ *Have been promoted to roles with increased management responsibilities*
> ◆ *Assume leadership positions with an increasing sphere of influence*

The Mortenson Center has empowered librarians to take on additional responsibilities and act as leaders in their libraries and communities, but it has been less successful in helping them advance into formal leadership or managerial roles. While eight in ten respondents felt more prepared to take on

leadership roles or additional responsibility in their libraries thanks to their training, only one-third actually took on leadership roles in professional networks. Even fewer (21 percent) received a promotion within the last five years. Many librarians, especially those working in smaller libraries, had limited opportunities for formal advancement. In these cases, the absence of a promotion does not indicate that the participant has not grown as a leader and library professional. In fact, most participants in Mortenson Center programs have demonstrated their leadership by leading new initiatives or implementing changes in their libraries in their current positions, and the

lower rate of promotions is tied mainly to lack of oppor-unities for advancement and that in most cases, just a few years have elapsed since their training.

The participants who did advance into more formal leadership positions were more likely to have one or more of the following traits: they were in senior professional positions at the time of their training, they worked in a university library, and/or they attended an Associates program. As Figure 3 shows, participants who came from middle management or

Figure 3
Promotions by Professional Level of Mortenson Center Participants

■ Did not receive a promotion   ■ Received a promotion

Middle Management: 83% / 17%
Administration/Senior Management: 76% / 24%
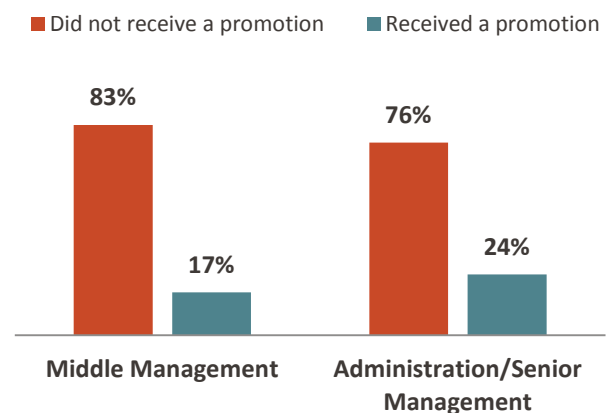
Figure 4
Promotions by Mortenson Center Program Type

■ Did not receive a promotion   ■ Received a promotion

Associates: 74% / 26%
Other: 85% / 15%
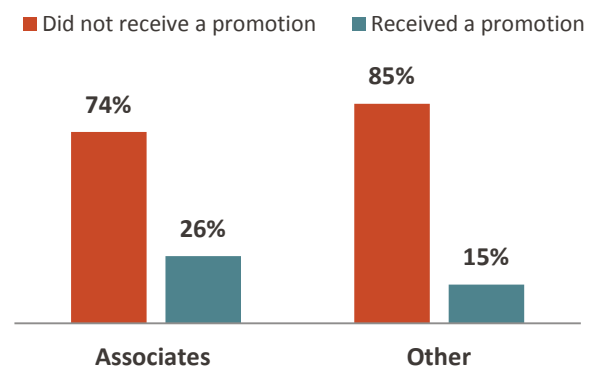
administration/senior management[2] were most likely to report receiving a promotion: almost one in five participants at the middle management level and one in four at the administration level were promoted over the last five years.[3] In terms of years of professional experience, the majority of participants with either six to 10 years (73 percent) or 10 or more years (62 percent) of professional experience reported leading an effort in their libraries to introduce a new tool, service, or resource. In many cases, alumni in middle management or administration/senior management were best positioned in terms of their authority and job responsibilities to make changes to their libraries. Their ability to implement changes, in turn, further positioned them as leaders in the library, increasing their chances of receiving promotions.

Those who were promoted were also more likely to work in a university library setting and/or to have attended an Associates program (see Figure 4). Of those promoted, 79 percent work at a university library, which are typically larger and therefore offer more opportunities for advancement than other types of libraries. Lastly, as Figure 3 shows, participants in Associates programs were twice as likely to receive a promotion as participants in country-specific programs; of the 24 survey respondents who reported receiving a promotion, fifteen were Associates and seven were country-specific participants (two did not specify their program). Since leadership opportunities vary considerably by library and country, this difference by program type does not conclusively indicate that Associates programs are more impactful than other programs. It does, however, suggest that Associates' self-selection into Mortenson training (as opposed to other participants who often attend training following a referral from their home libraries) yields a highly ambitious and motivated group of participants that in some cases achieve more outcomes than their peers in other programs.

IMPACT ON LIBRARIES

Overall Desired Outcomes for Libraries: *Libraries are vibrant places that provide up-to-date information and services; are better resourced; are more welcoming, customer-oriented, and useful to members; and are ever-evolving to meet community needs.*

The Mortenson Center's programs trained participants to serve as leaders in their libraries, which has resulted in their libraries offering expanded services, new technologies, and a more customer service-oriented approach. Participants' libraries clearly benefitted from the training their staff members received at the Mortenson Center. They expanded their programs and services, and their staff members demonstrated a clearer customer focus. Despite these successes, the data suggest that the Center has been limited in its ability to affect how libraries operate beyond building individual participants' skills, knowledge, and networks.

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[2] Respondents self-identified their professional position/level as entry level, middle management, administration/senior management, or other. These positions/levels do not always correspond to their number of years of experience.
[3] The sample sizes for the "entry level" (four responses) and "do not work in a library" (nine responses) options were too small to include in this comparative analysis.

Expanded Services that Align with Successful Models and Users' Needs

> **Specific Desired Outcomes for Libraries:**
> ◆ *Offer new/improved services based on lessons learned and models from Center programs*
> ◆ *Use technology to provide new services*

Since their Mortenson Center training, most participants' libraries have offered new services based on successful models and their library users' needs. Of those who have had at least one full year to implement a new service or program, more than 70 percent have led an effort to introduce a new tool, service, or resource in their library. Technology was a central component and enabling tool for many of the reported changes. The new services include both programs to help libraries better serve users and programs to help librarians better manage libraries:

- **Programs to help libraries better serve users:** Programs introduced in public or community libraries included new programs and spaces to engage specific user populations, such as digital media labs for teenagers and an e-magazine publishing class for children. Many of the changes in university libraries, on the other hand, sought to improve users' access to information and their ability to navigate the library's existing services. For example, a 2009 Associate launched an online information literacy course available to all students at her university. A participant in the 2010 Tech Training program introduced remote access to her library's databases and implemented software to reorganize online resources into subject-specific portals.

- **Programs to help librarians better manage libraries:** In addition to these user-focused changes, a number of participants implemented systems to better manage operations and services in their libraries. These included installing a tool to track the location of books within the library and introducing projects to gather data about library use to better allocate staff resources.

Mortenson Center participants report that most of the new services they have implemented were based either on models they observed during the library tours or on their perceptions of their users' needs. That the librarians were inspired by examples they saw in the United States and by users' priorities suggests that the participants are applying both the specific models and the approaches that the Center promotes in its trainings. The Associates who implemented the teen digital media labs and the information literacy course were inspired, respectively, by the U-Media project at the Chicago Public Library and the success of a similar information literacy course at the University of Illinois, both part of Mortenson tours. Librarians also implemented programs they understood to be needed by their users. This understanding was generally observational, rather than based on data collection. For example, several librarians created spaces for children or teenagers because they saw that these groups were otherwise underserved by educational and recreational activities in the community.

> *"At the classes held for librarians in the country…we put an emphasis on organizing the library space, giving as example the libraries we visited during the Mortenson program. Some of the librarians arranged their space according to what we saw in the American libraries."*
>
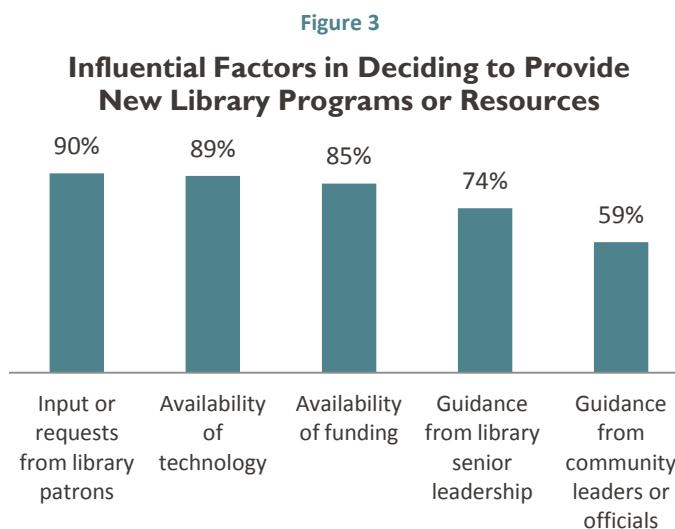> *— 2011 Romanian Program Participant*

Not all participants have implemented changes in their libraries, and this evaluation revealed three common barriers that participants faced: funding, local political conditions, and the participant's position. Multiple participants cited shrinking public funding to libraries as limiting their ability to create new programs. As discussed below, several were able to secure funds for their projects, but most were not. At least four participants cited local political instability or unrest in their countries as challenges to expanding library offerings. Finally, early-career librarians did not always have the authority or support from their directors to implement changes. As a participant in the 2009 South African group said, "The platform for me is not high enough…our professional colleagues are not too welcoming of US interns[4] trying to introduce any trainings for them, unless it is specifically supported by senior library management and conducted by someone much more important in the library." While the Mortenson Center cannot influence political or economic realities in its participants' home countries, it can better position more junior participants to successfully make change when they return. Other similar library training programs have found that providing small project grants and awards or other opportunities for public recognition can help position early-career participants to become leaders in their libraries.

Enhanced Customer-Service Orientation

> **Specific Desired Outcomes for Libraries:**
> ◆ *Libraries are more welcoming, customer-oriented, and useful to members*

Research suggests that after Mortenson Center training, both participants and their libraries adopt a more customer-oriented attitude. Fully 90 percent of participants say that input or requests from library patrons are influential or very influential in how they make decisions about programming and resource allocation at their library. In fact, user input is the most influential factor assessed, followed closely by availability of technology. Further, the data show that libraries are better able to meet users' needs after a staff member participates in a Mortenson Center training: 79 percent of participants say that, since applying the lessons they learned at the Mortenson Center, their library is more prepared to serve users' needs, and 76 percent say that their colleagues are more prepared to serve users' needs.

Influential Factors in Deciding to Provide New Library Programs or Resources

Input or requests from library patrons	Availability of technology	Availability of funding	Guidance from library senior leadership	Guidance from community leaders or officials
90%	89%	85%	74%	59%

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[4] This survey respondent described herself as a "US intern" because she was part of a Mortenson Center program that involved shadowing/training directly in the library.

While survey data indicate that Mortenson Center alumni are adopting a more customer-oriented attitude, few participants reported instances in which requests or satisfaction data from users directly informed programming decisions in their libraries. Specifically, about six in ten participants indicated that their libraries have surveyed users' satisfaction within the past year, yet nearly all (90 percent) say user input is influential. The gap between those who say user input is influential and those who use it to inform their work suggests that participants face barriers in moving their libraries more fully toward a user-driven working style. Interviewees who did directly implement a new service or program as a result of user input were from larger libraries (a university library and a large regional library) and were in more senior positions with greater decision-making autonomy to make these changes. This suggests that the Center may be limited in the extent to which it can be influential in shifting libraries toward more user-driven decision making through its programs that work with individual librarians.

> *"[After I conducted a training on] Customer Care…the library's focus shifted to personal customer care and our customer satisfaction survey shows an improvement in our service. Our service rated 96 percent in the customer survey conducted in March 2013."*
>
> *— 2012 Associates Program Participant*

Limited Success in Improving Libraries' Ability to Fundraise

Specific Desired Outcomes for Libraries:
- *Have increased funding and resources*
- *Have sustainable funding streams to support services*

The Mortenson Center is not currently meeting its goals to increase libraries' access to and diversity of resources. Of its five core training areas, it has seen the least skills improvement in fundraising. Sixty percent of respondents say that their libraries do not better allocate funding or resources since their Mortenson Center training, and only 31 percent say that their library has more funding or access to resources. Several interviewees reported having applied for grants, often with support from Mortenson Center Associate Director Susan Schnuer. Two, including a 2012 Associate who received a grant of about $50,000 from her municipality to open a new e-library with databases, were successful, but most were not. Research reveals that these shortfalls on fundraising are likely due to two factors: that fundraising practices vary widely by country and cultural context, and that fundraising is not within the purview of all participants. Fundraising training, and in particular fundraising training within an American context, is likely not relevant to all participants. Given this, the Center is limited in its ability to provide broadly relevant, actionable fundraising training to its participants. It may be able to have greater impact in this area by tapping partners to provide participants with locally relevant training on fundraising.

IMPACT ON COMMUNITIES

Overall Desired Outcomes for Communities: *More community members use library services and view the library as integral to the community's well-being.*

The Mortenson Center has successfully shifted librarians' attitudes about their role in the community, inspired them to adopt a more user-driven approach to their work, and developed their leadership potential to serve their libraries and communities. However, there is limited evidence to suggest that the Center has achieved its interim and long-term goals of shifting community members' attitudes and behaviors. One important reason for this lack of evidence is just that this evaluation did not include direct contact with community members. Another is that the Center has limited capacity to collect data on community impact from the many communities in which its librarian participants work. Further, the Center has limited ability to directly affect change at the community level due to the nature of its programs, which primarily focus on one-time, intensive trainings for individual librarians.

The Mortenson Center's desired outcomes for communities relate to how the community's perceptions of and behavior toward their libraries have changed. While the evidence does not definitively show that the Center's programs have led to more people using their community's library or viewing it as instrumental to their community's well-being, the Mortenson Center has made strides in changing how participants interact with their libraries. Specifically, it has prepared participants to build partnerships and inspired them to increase their community outreach, which in some cases has increased community members' awareness of library resources and services.

Increased Partnerships with Community Organizations

Specific Desired Outcomes for Communities:
- *Community members view librarians as helpful and knowledgeable*
- *Community members view librarians as leaders in the community*
- *Community members work with librarians to implement new services and resources*

Based on what they learned at the Mortenson Center, some participants successfully built new partnerships in their communities that led to increased awareness of their library's offerings among community members and, in some cases, to additional support for their library. Prior to the trainings, many participants did not actively build partnerships in their communities; they did not see this as their role, nor did they have models of how these partnerships could function effectively and benefit their libraries. As a result of the library models they were exposed to and the core skills they learned, especially communications and advocacy, participants were better prepared to engage with local organizations or community groups. In one instance, a 2011 Romanian Program participant partnered with a local nongovernmental organization (NGO) to run a library program geared toward youth and young adults. Members of that community, through that NGO, worked with the library to continue the program despite funding and staff shortages at the library. In another case, a 2012 Associate formed a partnership, based on a model she saw during a library tour, between public and school libraries in her community, pitching the benefits of this collaboration to potential funders. A participant from the 2011

Romanian Program formed a similar partnership; she expanded the children's department in her library to enable larger school groups to hold programs at the library. In addition, 54 percent of survey respondents received invitations from community groups or leaders to speak or provide input, an indication that these librarians' statuses were elevated in their communities. While forming these partnerships was not one of the Mortenson Center's specific desired outcomes for communities, the partnerships positioned librarians and libraries as resources to the community. They boosted librarians' confidence and raised their status as leaders in the community, pointing toward the potential for community members to view librarians as helpful leaders in the future.

Enhanced Customer Service Approach and Increased Community Outreach

Specific Desired Outcomes for Communities:
- *Community members participate in library programs*
- *Community members have greater awareness of library services and resources*

As a result of the lessons they learned at the Mortenson Center, many participants were inspired to assess users' needs and increase their outreach in their communities, which in some cases led to increased community use of the library. Alumni reported that their perception of their role in their libraries and communities shifted as a result of attending Mortenson Center programs. One participant described how many library professionals in her country "still see librarians as bookkeepers, not as having vital roles in the community," but that Mortenson Center participants began to see themselves as leaders. They adopted a more customer service-oriented approach to their work and conducted more community outreach. For example, a university librarian in the 2011 South African program said that, after the training, her colleagues spent more time going out to speak with faculty and department leaders. In some cases, alumni asserted that this attitude shift and improved customer service led to more community members using their libraries. In fact, survey data indicate that 52 percent of respondents agreed that more people are using their libraries, and 44 percent agreed that community members more frequently hold meetings or events at their libraries (see Figure 6, below). While the vast majority of these reported changes in library use were observational rather than informed by data, a participant in the 2011 Romanian Group cited data that her library saw a 114 percent increase in teen library use after introducing a teen area and related programs.

> *"The frequency [of assessing users' needs] increased due to my training because now I know [that] the users are [a] priority and it is important for a library to be tailored to their needs wherever they are."*
>
> *— 2012 Summer Associates Program Participant*

Increased Community Awareness of Library Services

Specific Desired Outcomes for Communities:
- *Community members have a greater awareness of library services and resources*
- *Community members view the library as the best place to learn about and use new technologies*
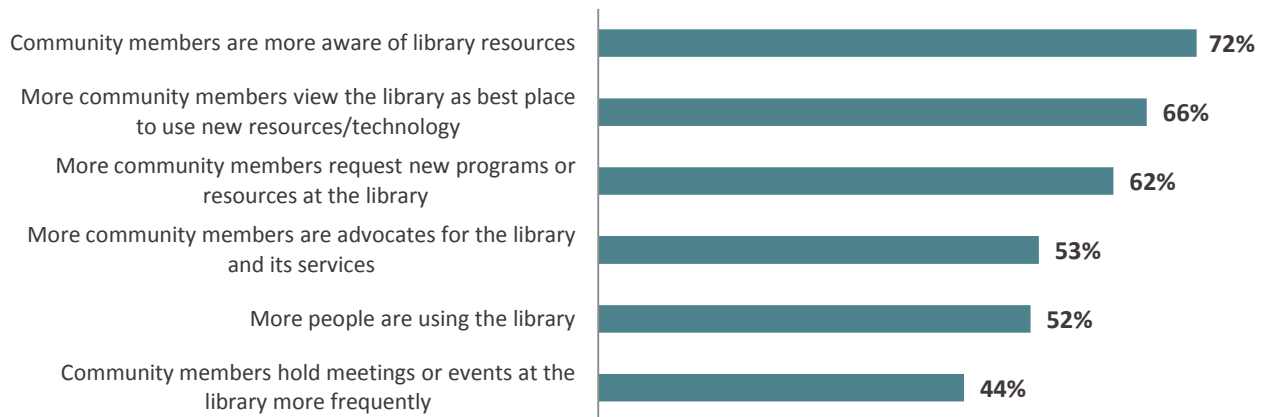
As a result of their enhanced customer service approach and increased community outreach, participants report that community members are now more aware of library services (see Figure 6,

below)**.** In some cases this increased awareness may have led to increased library usage. This suggests that the Center is partially achieving its community-level outcomes of building awareness among community members about the library's services and resources, and influencing their perspectives on the library as the best place to learn about and use new technologies. For instance, due to the lessons they applied after returning from the Mortenson Center programs, nearly three-fourths of participants indicated that their communities became more aware of resources at the library, and two-thirds said community members view the library as the best place to learn about and use new resources or technology.

> *"The users are more aware of the services they have and are more likely to approach librarians for assistance, who are more proactive. We take the library to them. We don't wait for them to come to the library."*
>
> *— 2010 Tech Training Program Participant*

Community Engagement As A Result of Participants Applying What They Learned at the Mortenson Center

Community members are more aware of library resources	72%
More community members view the library as best place to use new resources/technology	66%
More community members request new programs or resources at the library	62%
More community members are advocates for the library and its services	53%
More people are using the library	52%
Community members hold meetings or events at the library more frequently	44%

While this self-reported survey data and anecdotal evidence from interviews suggests that some participants have seen improvements in awareness and usage of the library's services, overall there is limited evidence to confirm that the Mortenson Center has directly changed the attitudes and behaviors of community members. This limited impact on community members is to be expected given the nature and duration of the programs; Mortenson Center has an indirect relationship to the communities in which its alumni work, and its programs focus primarily on empowering and positioning participants to develop as leaders.

FACTORS CONTRIBUTING TO IMPACT

Research Goal #2: *Determine which aspects of the Mortenson Center's program implementation contribute most to creating the outcomes and impact these programs yield.*

A variety of factors, including the Mortenson Center's niche in the library training sector, its staff, the customized nature of its trainings, and its well-organized and well-run programs, have contributed to its success to date. Participants in Mortenson Center programs over the last five years reported remarkably high levels of satisfaction and indicated that they were better prepared to take on leadership roles in their libraries and communities due to their training. All 113 participants that responded to the survey were satisfied or very satisfied with the programs they attended, and nearly all (98 percent) would recommend a Mortenson program to a colleague.

The Center's experienced, top-notch staff provide relevant, customized trainings that target an unmet need in the library sector for leadership training. They also run smooth, well-planned programs. Together these factors have led to the Mortenson Center's reputation as a highly effective and well-respected organization that helps equip librarians to lead. In addition to these overarching factors, the data revealed that specific characteristics of individual participants influenced the extent to which they developed as leaders, made changes in their libraries, and saw impact in their communities.

Participants' Satisfaction with the Mortenson Center	
Aspect of Training	**% satisfied or very satisfied**
Overall Mortenson Center training	100%
Quality of trainers	100%
Overall management	99%
Lectures	99%
Workshops (e.g., DiSC communications)	98%
Library tours	98%
Informal networking	97%
Quality of interpretation	95%

Note: Percentages for lectures, workshops, library tours, informal networking, and interpretation were calculated for those who reported that these aspects were part of their trainings.

Programs Meet Unmet Needs

The Mortenson Center teaches critical content to an audience that is not otherwise served. Experts and participants alike agree that its focus on global librarians and leadership skills is unique in the sector. Those experts and participants identified leadership skills as a top training need, but based on a scan of twelve library training programs, other organizations are not focusing on these topics and groups. Mortenson is one of four that accepts non-US library professionals and one of three that prioritizes leadership and management. It is one of only two programs to do both. As one expert said, "There's a sweet spot that the Mortenson Center serves. There are not a lot of others who are doing this sort of thing, and they're able to do it in a way that's really quite effective."

By accepting library professionals with different levels of experience, from different types of libraries, and from countries all over the world, the Mortenson Center provides opportunities for librarians to meet with and build networks among colleagues with whom they would not otherwise connect. As described in the "Impact on Librarians" section above, one of key reasons alumni chose to attend the

Mortenson Center was to meet and learn from peers from other countries. The Center's strategic decision to work with these diverse cohorts of librarians has enabled participants to learn from each other and, in some cases, to develop mentoring relationships. It has also, however, meant that trainings are sometimes not as targeted to the particular interests of each individual as some participants would like. Participants say that customization increases a training's effectiveness in preparing them to apply lessons learned to their work. For example, a participant in the 2011 Romanian Group noted that the content overall was more tailored to mid-level staff than to library management because the group of 15 people had only four library directors. There is an inherent tension between customizing trainings and maintaining cohort diversity.

While the Center is delivering a high-quality program that effectively meets unmet needs in the sector, it is relatively unknown among global library professionals. Most interviewees came across the Center either by doing a general online search for library training or through its affiliation with the University of Illinois. Some participants were referred to the program by colleagues who had attended in the past, and some were introduced by other library sector organizations, such as the US Embassy Information Research Center in their countries. Applicants must proactively seek the Center out, which means that it is attracting many highly motivated participants, but that its ability to attract participants in regions where it is not already active is limited.

> ### Top Training Needs for Global Library Professionals
>
> The most common training need alumni, partners, and experts reported was **leadership training** for library professionals. Leadership trainings should address both how to manage libraries effectively and the important roles librarians and libraries play in their communities. Additional training needs interviewees frequently shared included:
> - Workplace professionalism
> - Technology and IT, including digital cataloging, open source, e-books, and social media
> - Community outreach
> - Partnership building
> - Fundraising

Collaborative and Culturally-Responsive Approach

The Mortenson Center is further distinguished from peer organizations by its ability to work effectively in challenging contexts and by its efforts to tailor its approach to participants' backgrounds and cultures. A partner based in Nigeria highlighted his organization's multi-year partnership with the Center that succeeded despite political instability and violence in his country. He attributes that success to the fact that the Center built on existing platforms and local capacity rather than trying to replicate those structures. For example, it had participants attend an existing Nigerian ICT Forum training series to gain exposure to ICT topics and build relationships with technology experts, rather than creating a new venue for training. Participants and partners also cited the Center's policy of working with an in-country partner to identify top learning needs and provide cultural context for country- or region-specific program as effective in developing locally-relevant programming. Participants in the Romanian Group, for example, felt that by partnering with IREX, the Mortenson Center ensured that they would continue to have a key partner in their home libraries and local library associations after the training.

The Mortenson Center is known for providing practical trainings calibrated for the situations facing library professionals in developing and transitioning countries. One expert working in another library training program described the Mortenson Center's approach as respectful, appreciative of what participants offer, and designed to build leadership skills without getting "too stuck on the resource barriers." He cited an instance in which staff brought participants to a Barnes and Noble bookstore to provide a real-world example of a welcoming space that promotes a love for books and to encourage participants to think creatively about ways to engage the community despite funding challenges.

High-Quality, Experienced Staff

Barbara Ford and Susan Schnuer's experience, effectiveness as trainers, cultural competence, and ability to play multiple roles contribute significantly to the Mortenson Center's ability to affect participants and their libraries. Every participant surveyed reported being satisfied with the quality of their trainers, and 85 percent were very satisfied. Stakeholders see Director Barbara Ford and Associate Director Susan Schnuer as friends, mentors, colleagues, and role models. Several mentioned how much they enjoyed invitations to Barbara's and Susan's homes, which they took as an indication that Barbara and Susan were personally committed to their growth and professional development.

Along with their personal qualities, Barbara and Susan are effective because of their expertise and their experience as instructors. Not only do they understand librarianship, but they are able to teach it. Experts, partners, and participants attribute their ability to effectively train to their experience teaching and their desire to meet participants where they are in their professional development. In addition to their effectiveness as trainers, Barbara and Susan also have the ability to play multiple additional roles, including consultants to library training programs such as the International Network of Emerging Library Innovators (INELI), mentors to library professionals, and connectors between library organizations. All of these have been critical to the Center's ability to engage with the sector in different ways. Finally, Barbara's and Susan's former and current affiliations with top organizations in the library sector, including the American Library Association (ALA) and the Graduate School of Library and Information Science at the University of Illinois, create credibility both for them individually and for the Center as an organization. Matching all of their credentials would be highly difficult, but ensuring that any future Mortenson Center staff or leadership has similar levels of professional experience and strong networks in the sector, as well as a personal commitment to participants and the ability to play multiple roles effectively, will be central to the Center's continued success and sustainability.

> *"When I think of the strengths of the Mortenson Center, I think of Barbara and Susan."*
>
> *— Mortenson Center Partner*

Relevant, Customized Content in Effective Formats

The Mortenson Center's sessions and workshops exposed participants to useful knowledge and practical, everyday skills such as communications and management. These skills are relevant to librarians' work and enable them to serve as more effective leaders in their libraries. Ninety-nine percent of survey respondents said that Mortenson Center training topics were relevant to their

professional development; many highlighted in particular the focus on communications, management, and customer service, which were newer topics for most. As noted previously in this report, participants particularly valued opportunities to visit libraries in the United States. In fact, they rated library tours as one of the best aspects of the Mortenson Center trainings, with 98 percent of respondents indicating that they were satisfied or very satisfied with them. Seeing the models and best practices they had read about or discussed in workshops provided

opportunities to learn about implementation, helped them see that change is possible in their own libraries and, in at least one case, introduced them to other library professionals who may be able to guide them in implementing similar programs.

Figure 5

Participants Who Agreed that the Mortenson Center Training Was Relevant to Their Professional Development, Library, and Community

Professional development: 99%
Library: 97%
Community: 92%
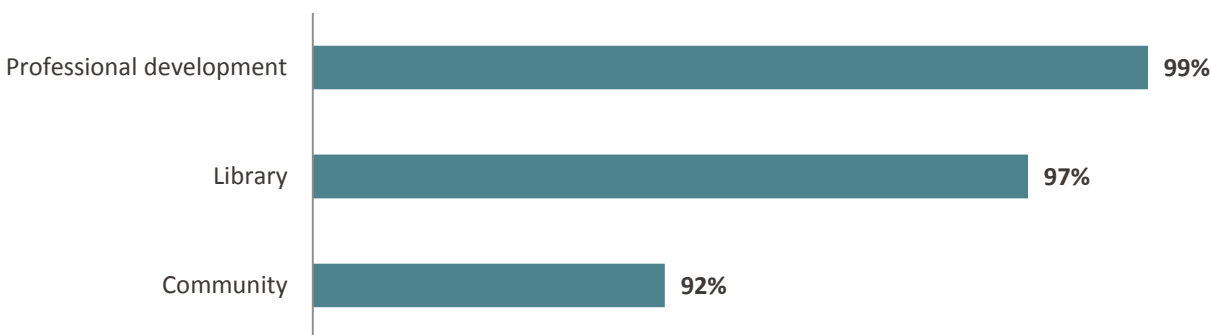
Along with the relevance of its content to librarians' professional development, the Mortenson Center's trainings are customized to its participants' needs (see Figure 7)**.** The Center tailors Associates programs to participants' self-reported objectives and other programs based on the input of its local partners. It even provides one-page participant biographies to outside trainers to ensure they develop sessions that cater to the audience's specific needs. By seeking to customize program content to the specific needs and goals of participants, the Mortenson Center is able to connect them with the content and opportunities most useful for their professional development.

While participants were satisfied overall with the content of the trainings, some indicated that certain sessions—particularly those related to technology—could have been more contextualized to the conditions in their home libraries. They recounted instances in which trainings focused on open-source, online tools, while participants' libraries did not have reliable internet connections. Multiple participants also requested more hands-on opportunities to reinforce the skills they built, better preparing them to apply those skills when they returned. They explained that exposure to models and tools was important for inspiration and idea generation, but not sufficient for preparing participants to implement. A 2010 Tech Training participant felt her training was "so short and there was no practical hands-on session to

have a feel of the software with an expert around." This critique may in part be due to a misunderstanding of the Center's goals related to technology training, which are to position technology as a tool to serve users' needs and to prepare librarians to take on a change management role as their libraries expand their use of technology.

Well-Organized Training Programs

Participants value the Mortenson Center programs not only for their inspiring and practical content, but also for how well-run and organized they are. Many participants, especially those who traveled to the United States for the first time, appreciated that the program sessions and logistics were highly organized, which enabled them to more comfortably acclimate to a new environment and culture. As a participant in the 2011 Romanian Group said, "It was a very well-prepared program, both the classes and the visits…It was an efficient learning experience in a short period of time." Interviews showed that, in addition to contributing to participant satisfaction, the smooth logistics likely contributed to learning outcomes. Several interviewees reflected that because the program was effective, organized, and accommodated their needs, they were able to better trust the trainers and focus on learning.

Despite this overall satisfaction, some participants felt overwhelmed with back-to-back sessions and limited opportunities for informal networking and learning from their peers. Alumni appreciated that the agenda took into account their interest in learning as much as possible while in the program, but at the same time, some felt it was "jam-packed" and "exhausting." Some also wished for more opportunities for peer-to-peer learning to contextualize the solutions and resources they were learning to their home libraries. By replacing some of the more-structured sessions with time for informal networking or time to practice lessons learned, the Mortenson Center can help participants feel less overwhelmed by the amount of content they are absorbing and more effectively learn from and build lasting relationships with their peers.

> *"We heard a lot about the American librarians' problems and how they solved it, but what about the problems elsewhere?"*
>
> *– 2012 Associates Program Participant*

Differences in Impact by Individual

In addition to the factors above that contribute to the Mortenson Center's overall effectiveness, the motivation and experience level of specific participants contributed to the Center's effectiveness in training them in the following ways.

- **Participant Motivation**: Participants in programs that required applications, such as the Associates programs, were more likely to implement new programs in their libraries, receive promotions, and take on new management or leadership roles. These participants typically proactively sought out and applied for training. They also often self-financed or identified and secured their own funding to attend the training. Their ability to be proactive and invest personally in their own professional development suggest that these participants are highly motivated and ambitious, which may explain their relative success.

- **Participant Experience:** Participants with more years of experience and those in middle and senior positions were more likely to report impact in their libraries and communities, such as implementing new programs or increased community awareness of library resources. These participants had the authority to make changes upon returning to their libraries. On the other hand, junior participants reported in some cases greater impact in terms of their own personal professional development, including growth in their skills and their self-confidence as leaders. Going forward, the Center should bear in mind that participants with different levels of professional experience may benefit from different aspects of the program and put what they learn to use in different ways in the short term.

OPPORTUNITIES TO INCREASE IMPACT

By making several important adjustments to its programs, the Mortenson Center can build on its many successes to date and increase its chances of achieving more of its long-term goals, as well as more of its library- and community-related goals. Already, the Center has increased librarians' confidence and skills, supported their implementation of new programs in their libraries, and in some cases influenced how libraries operate and interact with communities. As such, it is largely on track to achieve its short-term and interim goals related to librarians, as well as many of its interim goals related to librarians' libraries and communities. Now, by making adjustments to its programs, operations, and communications, the Center can position itself to achieve even more of its objectives and be more sustainable.

Given staff and resource limitations, the Center will likely not be able to implement all of the opportunities described below in the near term. It should therefore focus on those that most align with the types of impact it prioritizes deepening. For example, if the Mortenson Center most prioritizes increasing outcomes at the library and community levels, it should prioritize gearing programs toward encouraging and enabling librarians to take action upon returning home. If, on the other hand, it wants to ensure that it is covering all of the core librarianship skills its participants need, it should focus on working with partners to cover skills areas in which it has not been as effective to date.

PROGRAM AND CONTENT OPPORTUNITIES

The Mortenson Center can increase the likelihood that participants step into leadership roles that affect their libraries and communities by making three types of adjustments: providing participants with adequate support when they return home, ensuring that program content prepares participants to implement changes in their home libraries, and leveraging its partnerships to offer the full range of librarianship trainings participants need. In addition, it can better set participants' expectations and increase their satisfaction by furthering tailoring its programs and more clearly defining and communicating the Center's approach to technology and fundraising.

Add Post-Program Support to Increase Alumni's Chances of Taking on Leadership Roles

Mortenson has been highly successful in equipping librarians to become leaders, and the next step is to support them as they work toward the goal of taking on greater leadership responsibilities. To do this, the Center will need to provide more support to alumni, almost all of whom requested more Mortenson Center involvement in their region. Understanding the resource and time implications of providing post-program support, the Center can first experiment with lower-barrier options before attempting to build out a full alumni program. For example, other library training programs have found that holding follow-up calls with participants' library directors can provide an opportunity to remind them that participants have built key skills and knowledge—and thereby help position those participants to take on new leadership roles.

Orient Programs toward Preparing to Take Action upon Returning Home

Participants are more likely to step into leadership roles, share what they learned with colleagues, and initiate improvements in their libraries when these outcomes are explicit goals of a program. The Center should set these expectations up front and enable participants to practice applying the skills and lessons they learn during training. It can better equip participants to implement changes by providing more hands-on practice during training sessions and by shifting the focus of its programs to orient more toward planning for action after participants return home. One way to do this is to include sessions on creating professional development or project planning that include short-term action steps. Another is to end each day with a group debrief that pushes participants to identify one skill or model they learned that day that they could apply at home. For example, following a session on customer service, the Mortenson Center could lead participants through a brainstorming exercise to identify the steps they would need to take to gather more user input in their libraries.

Further Customize Programs to Better Target Participants' Greatest Needs

The Mortenson Center can increase its impact by more intentionally customizing its programs to participants' individual learning needs and levels of experience. As this evaluation shows, participants who attended trainings customized to their particular circumstances felt better prepared to implement changes after the program. Two options for increasing customization are:

- **Develop targeted curricula for more homogeneous cohorts:** The Mortenson Center could group participants of similar professional levels, library types, or topical expertise. This would enable the Center to develop training materials specifically aimed at the group's expertise level and job responsibilities, without some participants feeling the content was above or beneath them. Alternately, the Center could offer tracks or breakout sessions throughout the training for participants at different experience or skill levels. One drawback to this approach is that it would mean less diversity in terms of professional levels or skills. However, it would not affect other types of diversity (e.g., geographic and cultural) and would likely increase the training's relevance for each participant.

- **Extend efforts to assess needs:** The Mortenson Center works with local partners to assess training needs for its country- or region-specific programs, which this evaluation found has resulted in targeted and customized trainings that reflect the local context. Staff could do a more streamlined version of this needs assessment for the Center's Associates program, coupling the outreach it currently does to applicants with outreach to their library directors and/or colleagues to assess specific needs, goals, and contexts for leadership development. This information could then be aggregated and taken into account when developing the content for each cohort. Leaders in other library training programs have found that building such relationships with participants' colleagues can have the added benefit of keeping participants accountable for creating change when they return home post-program.

Consider Additional Ways to Work with Partners to Address Gaps in the Center's Offerings

Mortenson Center has several long-standing partnerships with peer organizations, both in the United States and abroad, that provide specific trainings related to the partner's expertise, access to participants, insight into local needs, and follow-through for participants. There may be additional opportunities for the Center to increase its work with partners to address some of the gaps in its current programs, for example by providing supplementary trainings on technology or fundraising, or continued support to participants once they return home.

Refocus and Better Communicate the Center's Approach to Technology and Fundraising

Participants did not rate technology and fundraising as highly as the Mortenson Center's other skills areas, in part because they misunderstood the Center's approach to technology and because fundraising is highly dependent on local circumstances. The Center should clarify internally and externally its approaches to both topics. It is best positioned to expose participants to technology as a tool to facilitate customer service and to prepare librarians for change management related to new technology. Participants should understand these as the training goals. For fundraising, Mortenson can serve as a connector between participants and local partners with an understanding of local resource development, such as IREX in Romania.

OPERATIONS AND COMMUNICATIONS OPPORTUNITIES

Participants, partners, and experts agree that the Mortenson Center is a well-run organization with effective leadership. It has opportunities to use the information from this evaluation to ensure its continued success and sustainability.

Plan for the Center's Sustainability and Continued Success

While the Mortenson Center's staff is irreplaceable in many ways, there are certain qualities, competencies, and areas of expertise that any leader in the Center should possess to uphold the Center's reputation and impact. Staff must be experienced, well-connected, and personally committed to global librarians' professional development. They should have experience working with people from different cultural backgrounds and be able to adapt their communications style and approach to different cultures. They must also be able to effectively train and mentor library professionals and consult with and connect library organizations. The Mortenson Center staff can use this list of core competencies and qualities to recruit and train new staff who will be prepared to support its programs and eventually assume leadership responsibilities within the organization. One way to build the Center's ongoing capacity, as well as to help ensure a smooth transition for the day in the future when the Center's current leadership may retire, would be to recruit additional staff while the Center's current leadership continues to be deeply engaged.

Use Evaluation Data to Describe Mortenson Center's Work

This evaluation has revealed data about the Mortenson Center's achievements and reach that have implications for how it positions itself in the market and what it holds itself accountable for accomplishing. The Center may want to shift how it frames its work and impact to focus on the areas in which it is most effective and best positioned to create change. There is significant data demonstrating that the Mortenson Center is highly effective at building librarians' skills and confidence, and at shifting their attitudes and behaviors to align with best practice in user-driven libraries. Conversely, there is limited data to support its effectiveness in influencing the extent to which these librarians are able to step into leadership roles, change how their libraries operate, and expose their colleagues to new approaches and models. Similarly, there is limited evidence to demonstrate that the Center is changing how community members perceive and use libraries—which is challenging to assess without investing significant time and resources into gathering information from community members. The Center may, therefore, want to emphasize the areas of its work for which it has data proving its effectiveness—i.e., its efforts to develop and position librarians to lead and affect change in their libraries and communities—while acknowledging its "dotted line" or indirect impact on the areas in which it contributes to change but does not alone create it.

Conduct More Intentional Outreach and Marketing to Increase the Center's Reach

While the Mortenson Center is well-respected among those familiar with it, many participants only learned about its programs through informal means such as word of mouth or internet searches. This may be limiting the Center's reach and ability to access participants in countries or regions in which it is not already working regularly. The Mortenson Center should more intentionally publicize its programs, expertise, and impact to continue attracting high-quality, motivated participants, and to further build its networks in the library sector. Based on participants' feedback, there may be low-cost ways to do this. For example, the Center can strengthen its relationships with alumni and build on its goodwill by providing them with guidance on how to talk and write about their Mortenson Center experiences and by encouraging them to nominate qualified colleagues for future trainings.

Conclusion

The Mortenson Center is both a well-respected and highly effective leadership training program for library professionals. In fact, experts, partners, and participants consider the Center to be the premier program for global librarianship training because it effectively imparts the key skills and confidence librarians need to lead modern libraries. While the Mortenson Center has its greatest impact on the librarian participants it trains and reaches directly, and less influence on the libraries and communities it reaches by means of these librarian participants, it can deepen its impact on libraries and communities by making a handful of strategic, well-considered adjustments to its programs, operations and communications. Based on these findings, the next phase of Arabella Advisors' work with the Mortenson Center will focus on preparing the Center to use evaluation and strategic learning to inform its work going forward and to thereby continue to build on its success.

APPENDIX A: METHODOLOGY

Arabella Advisors conducted a retrospective evaluation to assess the impact of the Mortenson Center's librarianship programs over the last five years (2008-2013). Using both quantitative and qualitative approaches, Arabella is conducting a two-part evaluation to address the main research questions for this evaluation. The first two research questions below are answered in this report, whereas the third research question will be addressed in Phase 2 of this engagement. In this second phase, Arabella will develop a set of evaluation tools and provide strategic guidance on integrating these tools and evaluation processes into the Center's programs and operations.

EVALUATION RESEARCH QUESTIONS
1. Assess the extent to which the Mortenson Center has achieved the outcomes it seeks and how it has achieved those outcomes
2. Determine which aspects of the Mortenson Center's program implementation contribute most to creating the outcomes and impact these programs yield
3. Determine what data the Center should collect and what practices it should put in place to implement ongoing strategic learning and evaluation

PHASE ONE DATA COLLECTION AND ANALYSIS
- **Comprehensive Online Survey:** Arabella Advisors designed, implemented, and analyzed a 22-question online, multiple-choice survey for former participants of Mortenson Center programs over the last five years. Arabella administered the survey in three languages—English, Russian, and Romanian—for 178 participants, 113 of whom responded to the survey for a response rate of 63 percent. Arabella administered a pilot version of the survey to four representative participants to test the clarity of survey questions before distributing the survey to all respondents. Data from the pilot survey is incorporated into the findings reported in this document where questions and answer choices were substantively the same as in the final participant survey.
    - English survey: 75 / 126 respondents (60 percent response rate, including 4 pilot respondents)
    - Russian survey: 19 / 30 respondents (63 percent response rate)
    - Romanian survey: 19 / 22 respondents (86 percent response rate)

- **In-depth Interviews:** Arabella conducted 24 interviews with Mortenson Center alumni, partners, and experts in the library sector to inform our findings and recommendations.
    - 16 interviews with Mortenson Center alumni
    - 5 interviews with partners
    - 3 interviews with experts

- **Mortenson Center Document Review:** Arabella reviewed internal Mortenson Center reports and documents, including previous evaluation reports, program agendas from 2008-2013, and exit interview reports with Center participants.

- **Landscape Review of Library Leadership Programs:** Arabella also researched and analyzed eleven other library leadership programs that are similar to the Mortenson Center to assess similarities, differences, and comparative strengths.

DATA LIMITATIONS

All survey and interview data included in this report is self-reported by Mortenson Center participants, which can introduce bias. Those who responded to the survey and agreed to be interviewed may have higher satisfaction levels or closer relationships with the Mortenson Center than those who did not participate. These factors may slightly affect the data to be more positive overall, although Arabella has significant experience analyzing this type of data and using multiple data sources to confirm findings. In addition, some interviewees and respondents to the survey who had attended a Mortenson Center program several years ago were not able to directly attribute improvements in their skills and new leadership roles to their training, due to the time that had elapsed since their training occurred.

APPENDIX B: MORTENSON CENTER THEORY OF CHANGE

Appendix B: Mortenson Center Theory of Change

Mission & Niche: Strengthen ties among libraries and librarians worldwide for the promotion of international education, understanding, and peace, and to further the public service mission of the University ● Strengthen skills of library professionals , enabling these librarians to lead libraries that anticipate and meet user needs and support access to information ● Advocate for libraries as partners in community engagement and development

Strategies & Activities	Short-term Outcomes	Interim Outcomes	Long-term Outcomes	Impact

Strategies….
- **Develop and offer** tailored PD programs that provide exposure to the latest trends/practices in library science and focus on leadership development
- **Establish** national/regional strategic partnerships and **advise partners** to support formation of strong libraries
- **Implement** library projects worldwide that focus on access to information
- Provide **expert advice** to help transform libraries into institutions vital to their communities
- **Create training materials** relevant to librarians globally
- Utilize a **train-the-trainer** model

Activities….
- US-based training program
- Onsite tailored programs
- Post-training projects
- Lectures and presentations by MC leadership

Short-term Outcomes:
Participants gain knowledge, skills, and a network of colleagues

Interim Outcomes:
Participants are equipped to lead and innovate

Libraries are better-resourced and more welcoming, customer-oriented, and useful

More community members are using library services

Long-term Outcomes:
Participants lead and innovate

Libraries are vibrant places that provide up-to-date info/services to patrons and are ever evolving to meet community needs

Members view the library as integral to the community's well-being

Impact:
Effective and visible leaders

Proactive, evolving, tech-savvy libraries

Engaged, learning, informed communities

Influential Factors: MC staff capacity ● Availability of funding ● Quality of trainers ● Participants' sphere of influence, motivation, and commitment ● Partner quality, motivation, and commitment ● Support of the University of Illinois

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