

# MORTENSON CENTER FOR INTERNATIONAL LIBRARY PROGRAMS

## 2013-2014 ANNUAL REPORT

### Review of Major Activities and Accomplishments

The Mortenson Center's work supports the Library's fifth strategic goal of sustaining partnerships and collaborations, including identifying opportunities for international partnerships that inform long term goals supporting international initiatives in the Library and on the Urbana campus.

As in previous years, 2013-2014 was a busy and productive time for the Mortenson Center. The year began with poster sessions at the August IFLA World Library and Information Congress in Singapore, followed by the Mortenson Distinguished Lecture, delivered by Sanjana Shrestha, READ Nepal Country Director, who spoke on "Community Libraries as Platforms for Sustainable Development."

In November, Susan Schnuer was invited by Mortenson partner IREX to provide training to a team of trainers in Myanmar. This team then provided training to over 50 public librarians from all regions of Myanmar.

Of particular note this year is the evaluation of the Mortenson Center that was undertaken by Arabella Advisors, with funding from the Bill and Melinda Gates Foundation and assistance from Jen-chien Yu. The Mortenson Center has trained more than 1,000 innovative library leaders since it was founded in 1991. Over 112 training participants who were surveyed and interviewed indicated that:

- The Mortenson Center is prestigious and seen as a model for librarianship training throughout the world. 100 percent of participants Arabella Advisors surveyed were either "satisfied" or "very satisfied" with the Mortenson Center's programs.
- The Mortenson Center alumni are creating their own impact. Eighty percent of survey respondents felt more prepared to take on leadership roles or additional responsibility in their libraries because of their training at the Mortenson Center, and one-third of participants went on to take such leadership roles in professional networks.
- Mortenson Center alumni are putting innovation into practice. More than 70 percent introduced a new tool, service, or resource in their library within five years of training.
- Libraries and communities around the world see the impact of the Mortenson Center's work. Seventy-nine 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.

We have attached the Highlights from the report as an Appendix. The full report is at: [http://www.library.illinois.edu/mortenson/activities/reports/Arabella\\_Advisors\\_Mortenson\\_Center\\_Evaluation\\_Report\\_xJan\\_9\\_2013x.pdf](http://www.library.illinois.edu/mortenson/activities/reports/Arabella_Advisors_Mortenson_Center_Evaluation_Report_xJan_9_2013x.pdf)

Thanks to funding from the Bill and Melinda Gates Foundation, the Mortenson Center was able to update our promotional materials; we took advantage of this opportunity to rebrand the Center. Our new brochure and newly-designed Newsletters are available on our website.

Susan Schnuer attended a hackathon organized by IREX in February in Romania. The goal was to create the training materials that will be used in the Beyond Access network, [www.beyondaccess.net](http://www.beyondaccess.net).

To explore diverse funding sources, Barbara Ford, Susan Schnuer, and Paula Kaufman visited federal funding agencies in Washington, DC in March 2014. Organized with the assistance of Lewis-Burke Associates, the visit included discussions with key personnel at the Institute of Museum and Library Services, US Agency for International Development, National Endowment for the Humanities, State Department, and the Fulbright Program.

Early in June, the Mortenson Center signed a partnership Memorandum of Understanding with the National Institute of Technology (NIT) Silchar. The University has been developing a partnership with NIT Silchar, which will be formalized in September 2014. Our first activity of the partnership will be a conference and assessment visit to NIT Silchar early in 2015.

In May the Mortenson Center hosted 5 IFLA/OCLC fellows for two days. This is a long-standing partnership between OCLC and the Mortenson Center who have agreed to work together on hosting international visitors.

Many librarians participated in the annual program. In fact, this group was so large that the Mortenson Center staff divided them into two groups and ran concurrent programs. The new University Librarian and Dean of Libraries, John Wilkin, greeted the group.

16 librarians from 11 countries participated in the 2014 Mortenson Associates program. They were joined by 8 READ Global staff from India, Nepal, and Bhutan who also participated in the Illinois State Library's Small Public Library Management Institute designed for rural librarians and experienced customized programming at the Center. The Associates' program focused on "Imagine, Question, Connect," designed for library innovators and decision-makers. The entire group was invited by the Chicago Public Library and the Urban Libraries Council to participate in the first US-based Next Library conference in Chicago, where they had the opportunity to meet Chicago mayor Rahm Emanuel.

The Mortenson Center participated in the inaugural University Library Faculty Research Showcase in March 2014, presenting a poster on "The Mortenson Center Model." The

Mortenson Model outlines key components and objectives from recent Mortenson training programs. Participating in this research showcase allowed us to share outcomes from current programs with Library faculty and colleagues.

As always, the Mortenson Center is grateful to the UIUC and local library colleagues who help deliver the training for the Mortenson Center programs. In 2014, over 44 colleagues agreed to offer sessions; they include Linda Smith, Kate McDowell, Barry Pittendrigh, Julia Bello Bravo, Joe Lenkart, Laila Moustafa, Steve Witt, Sarah Williams, Sarah Christensen, Ann Craig and incredible staff at the Illinois State Library, Alice Cisna, Madhu Viswanathan, Deborah Stevenson, Celeste Choate, Jeff Ginger, Vicki Trimble, Frances Harris, Marsha Grove, Meg Edwards, Henry Hebert, Amy Cougill, Mary Laskowski, Beth Sandore, Robert Watson, Sarah Shreeves, Lisa Hinchliffe, Sue Searing, Kathleen Kern, Tom Teper, Jen-Chien Yu, Alan Lanham, Merinda Hensley, Karen Hogenboom, Lynn Wiley, Melinda Miller and Cate Kompore, Anna Maria Watkin, Meghan Hayes Mahoney, and Jim Hahn.

In addition, the Mortenson Center ran its successful Friends program. Colleagues from the university agree to “friend” one of the international librarians and commit to spending time with them. Over 83% of the 2014 Mortenson Associates indicated that the Friend experience was “extremely satisfying.” 2014 Friends included Atoma Batoma, Lesley Lee, Gretchen Madsen, Joe Lenkart, Lynne Rudasill, Laila Moustafa, Lisa Hinchliffe, Sue Searing, Kathryn LaBarre, Mary Mallory, Karen Hogenboom, Erin Kerby, Chris D’Arpa, Bill Mischo, Scott Schwartz, Qiang Jin, Greg Knott, David Griffiths, Mara Thacker, Kelly McCusker, Dan Tracy, Steve Witt, and Rand Hartsell.

On May 31, the Center saw the departure of Barbara Ford, who retired then. Her leadership and energy have guided the Center for more than a decade, and her leaving will impact the Center staff as well as the University Library. She will be missed.

### **Review of Major Challenges**

The Mortenson Center’s major challenges include the transition to new leadership, funding, and addressing the recommendations in the evaluation report from Arabella Associates.

Paula Kaufman has agreed to serve as Interim Director of the Mortenson Center for up to one year while the University Library carries out a search for the next Director and Mortenson Distinguished Professor. Paula serves on the search committee and she and Susan are engaging in the active recruitment of strong potential candidates. This leadership “diversion” may slow the development of Mortenson programs in data research and other services of interest to academic librarians around the globe, to which Paula will turn her major attention as soon as possible.

The Mortenson Center relies on annual earnings from its endowments, the University Library, gifts from individuals, and external funding agencies. In recent years, endowment earnings have not been able to keep up with increasing costs. Fund-raising

for major gifts from individuals is challenging; many potential donors appear to be unwilling to provide significant funds to operations and programs that already carry the names of other generous major donors. Although the Bill and Melinda Gates Foundation has been a consistent funder of programs carried out by the Mortenson Center, as well as of operational activities such as promotion and an evaluation of the Center's outcomes, it has announced the end of its Global Libraries program. We do not expect additional funding from that source after our current proposal, which is under consideration, is (hopefully) funded. We look forward to working with the Assistant Dean for Advancement as soon as s/he is appointed and with Beth Sandore in her role of AUL for Research to identify alternative funding opportunities.

The Arabella Associates' report, while generally highly positive, offered some recommendations for improving the Mortenson Center's impact:

- Add post-program support to increase alumni's chances of taking on leadership roles;
- Orient programs toward preparing participants to take action upon returning home;
- Further customize programs to better target participants' greatest needs;
- Consider additional ways to work with partners to address gaps in offerings;
- Refocus and better communicate the Center's approach to technology and fund-raising;
- Plan for the Center's sustainability and future success;
- Use evaluation data to describe the Center's work; and
- Conduct more intentional outreach and marketing to extend the Center's reach.

Although these are all reasonable actions, we are challenged by our very small staff, which is fully engaged in operational and fund-raising activities.

We remain grateful to staff in the Business Office and other Library and University support services who help us cope with the complexities of visiting and hosting librarians from other countries, challenges that will continue in future years.

Although we always are cognizant of the Mortenson Center's finances, we remain concerned about the growing costs of our programs for visiting librarians.

### **Significant changes in Unit Operations, Personnel, Service Profile, or Service Programs**

The most significant change was brought about by Barbara Ford's retirement. It created a time of transition to new leadership currently being recruited while Paula Kaufman oversees operations on an interim basis.

### **Unit and Members Contribution to Library-Wide Programs**

The librarians in the Mortenson Center were involved in a library and university-wide activities, including serving on library and campus committees. Additionally, they contribute to the profession at large through leadership and involvement in non-University groups. They speak often to relevant classes in GSLIS and other programs and meet with students interested in international issues and careers.

The University of Illinois' Office of Protocol contacts the Mortenson Center regularly to meet with ambassadors and general counsels from other countries. The Mortenson Center continues to represent the University Library with outreach activities to Illinois librarians, including visits to local public libraries and sessions at the Illinois Library Association. We have established a popular collaborative program with OCLC.

Library faculty and staff provide educational sessions for international librarians and are essential to the success of the Mortenson Center programs. Libraries in central Illinois and Chicago provide valuable tours and make presentations to visiting international librarians who participate in our programs. In addition to the contributions librarians and library staff on and off campus make to our programs, we think they benefit similarly through their interactions as we all gain insights into cultures that differ from our own. This not only contributes to the Library and the profession, it helps meet the Center's mission, and the purpose of the generous endowment gifts Walter and Gerda Mortenson made to the University Library: to strengthen international ties among libraries and librarians worldwide for the promotion of international education, understanding, and peace.

### **Contributions of individual Mortenson Center librarians**

Barbara Ford

Member of the U.S. National Commission for UNESCO

Susan Schnuer

Member of the Advisory Committee to the AUL for User Service

Member of the Staff Development and Training Committee

Member of the Provost's committee – Student Passion and Transformation

Member of Search Committee for University High School Librarian

Participated in the library's research showcase

Volunteered during commencement weekend to allow visitors to view the bronze tablets

Negotiated the library agreement with NIT, Silchar, India

Paula Kaufman (on leave FY14)

Chair, Search Committee for Dean of Liberal Arts and Sciences

Member of Advisory Committee, UIUC Center for Global Studies

Member of the board of the Champaign Public Library

Member of the Abraham Lincoln Presidential Library and Museum Advisory Committee

Member (non-voting) of the board of the Digital Preservation Network

Reviewed full professor cases for two ARL land-grant university libraries

### **Progress on Unit Annual Goals for FY2014**

- The Mortenson Associates program was offered in May/June 2014, with 24 participants. This is the signature Mortenson Center program in which many UIUC librarians and staff, as well as librarians in the local and state communities, assist in teaching and hosting participants.
- Successfully implemented the project with Read Global to train country directors and community staff from Nepal, Bhutan, and India with programs in May/June 2014 that included focused programming, train-the-trainer, participation in the Illinois State Library's Small Public Library Management Institute designed for rural librarians, and participation in the Mortenson Associates program.
- Funding possibilities were explored with in-person visits to relevant federal funding agencies in Washington, DC. A monetary gift from long-time library donors was directed towards support for our training programs, and we received funding from IREX and Gates for a variety of activities. Additionally, working closely with a program officer at the Bill and Melinda Gates Foundation, we drafted a proposal that would support development of leadership training modules available for trainers digitally.
- We worked closely with Arabella Associates to develop and implement evaluative measures for Center programs.

### **Unit Goals for FY2015**

- Prepare to transition smoothly to new leadership;
- Define more clearly Paula Kaufman's role and integrate her into the Mortenson Center's work after she completes her assignment as Interim Director;
- Prioritize and focus on the highest priority recommendations offered in Arabella Associates' report;

- Finalize and submit proposal to the Bill and Melinda Gates Foundation, and begin implementation immediately upon receipt of notification of funding, including preparing position description for needed staff and obtain preapproval from EC so as to carry out the necessary search as quickly as possible;
- Continue to work with READ Global to develop and implement appropriate programs;
- Offer the Mortenson Associates program in late spring 2015;
- Visit Namibia in summer 2014 to work with the Ministry of Libraries and Archive Services to develop a partnership and training program for public libraries. The visit will be funded by IREX.
- As the first step in our new partnership with NIT Silchar, visit the institution in winter 2015 to assess its relevant needs, participate in the international conference it offers, and develop local capabilities.
- Develop a multipronged fundraising plan designed to target individual Library donors, seek new potential donors, and identify and pursue private foundation and governmental or contracted funding sources;
- Assess the market for Mortenson Center programs in the academic library sector around the world and develop a plan to begin work to fill the identified needs; and
- Identify and support opportunities for Mortenson Center staff to develop professionally.

## **Statistical Profile**

### **Personnel**

- Barbara J. Ford (Faculty)
- Susan Schnuer (Academic Professional)
- Lindy Wheatley (Office Support Specialist)
- Jamie Luedtke (Academic Professional)

### **User Services**

Number of presentations to groups

On campus	13
Internationally	21
Number of participants in group presentations	
On campus	151
Internationally	290

Additionally, Barbara Ford made 4 presentations to various groups here and abroad.