



# MORTENSON CENTER

@ THE UNIVERSITY OF ILLINOIS LIBRARY

*developing librarians worldwide*

## MORTENSON CENTER FOR INTERNATIONAL LIBRARY PROGRAMS 2014-2015 ANNUAL REPORT

*The mission of the Mortenson Center for International Library Programs is to strengthen international ties among libraries and librarians worldwide for the promotion of international education, understanding, and peace.*

<http://www.library.illinois.edu/mortenson/>

### I. Unit Narrative

#### 1. Review of Major Activities and Accomplishments

The Mortenson Center's work advances the mission of the University Library at the University of Illinois at Urbana-Champaign (UIUC). At present the Library is developing its new strategic plan, thus referencing the prior Goals for FY12–FY14, the Center's work supports the Library's fifth strategic goal of sustaining partnerships and collaborations, including identifying new opportunities to develop international initiatives engaging the Library and the Urbana campus. Additionally, the Center's work is aligned with Goal II of the University's Strategic Plan, which focuses on providing transformative learning experiences. Moreover, the Center's activities have the expected outcome that its alumni (i.e., Center program participants) advance the University's Goal I (Foster scholarship, discovery and innovation) and Goal III (Make a significant and visible societal impact) through implementing changes in their respective libraries that enhance information access, learning and community development.

As in past years, 2014-2015 was productive but also a time of transition. Center Director Barbara Ford, took retirement on May 31, 2014, and Library Dean Emerita Paula Kaufman, served as Interim Director while a search took place. The year began with recruitment efforts for both the Center's Associate Program (joint exhibit with the Graduate School of Library and Information Science (GSLIS)) and for the Center's Director at the IFLA World Library and Information Congress held in August 2015 in Lyon, France. This was followed by a visit from the University of Pretoria Master of Information Technology program in September and by the 24<sup>th</sup> Annual Mortenson Distinguished Lecture, delivered by [Barbara J. Ford](#), in October 2014. She spoke on "Supporting Global Research: Libraries, Access, and Social Responsibility." The Lecture was held in conjunction with the [Library Research Seminar VI](#), which had the theme "The Engaged Librarian: Libraries Partnering with Campus and Community."

The search for the new Director of the Mortenson Center and Mortenson Distinguished Professor began in Summer 2014, applications for initial consideration closed in September, candidate interviews were held in November, and an offer was made and accepted in December. However, due to new procedures and necessary paperwork for a full professor finalist, the hiring of new Director Clara M. Chu was not approved until May 7, 2015, when the Board of Trustees met, and reviewed her documentation. Clara undertook the position of Director and Mortenson Distinguished Professor on June 1, 2015.

Susan Schnuer, Associate Director of the Center, was successful as PI on the Gates Foundation Grant “Strengthening Innovative Library Leaders (SILL)”, and was awarded \$521,014 in November 2014. The project will run in Namibia, Myanmar and Armenia, and will train 100 public librarians in each country. To date, subcontracts have been signed with Namibia and Myanmar. Susan worked with IREX to sign a contract for the SILL evaluator, Rebecca Teasdale.

The Center has experienced some staffing additions this past year. Rebecca McGuire was hired as Visiting Information Technology Specialist on the Gates Grant and started March 1, 2015. Lindy Wheatley, who was Office Support Specialist, had her position reclassified to Office Manager, starting January 4, 2015.

In December 2014, Paula and Susan began a conversation with staff from the Bibliotheca Alexandrina about a possible partnership, and the decision was made to continue the discussions once the new Director was in place. In February, IREX funded Susan to work with the Beyond Access team in the Philippines on a leadership module, and in March, Susan returned to participate in the leadership training in the Philippines.

In April 2015, Susan led a Mortenson Center team (Rebecca McGuire and Eric Kurt) to Namibia for the first pilot-test of SILL, and in May, Susan represented the Mortenson Center at the Gates Foundation Networking meeting. This key meeting brought together Global Libraries grant recipients from all over the world to discuss their contributions to library development and community building around the globe, and to discuss strategies for sustainable engagement after the Gates Foundation Global Libraries Program ends in 2017.

In May 2015 the Mortenson Center had several groups of international librarians come through its doors. The Center, first, hosted five IFLA/OCLC fellows for one day <https://www.oclc.org/news/releases/2014/201428dublin.en.html>, as part of a long-standing partnership between OCLC and the Mortenson Center to work together on hosting international visitors. Then, the Center welcomed twelve Mortenson Associates, representing six countries, who participated in this year’s Program, held May 28 to June 23, 2015. The number of Associates this year consisted of a smaller cohort than usual, but it was enriched with the participation of a computer science professor. The 2015 Associates Program focused on the theme “Innovative, Engaged, and Responsive Libraries.” This year we were able to video record the Associates giving elevator speeches about their experiences at the Mortenson Center, and Rebecca used these and other images to create a video for a 2015 Associates Program presentation at the Library Faculty meeting on June 23, 2015. The video has been edited and will be used for fundraising and marketing purposes, and as a Mortenson Center 25<sup>th</sup> anniversary celebration resource. Five Associates attended the American Library Association Conference in San Francisco after the program.

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 2015, 18 colleagues agreed to offer sessions; they include John Wilkin, Linda Smith, Kate McDowell, Meg Edwards, Andy Cougill, Jennifer Hain Teper, Josh Harris, Kyle Rimkus, Tom Teper, Jen-Chien Yu, Crystal Sheu, Sarah Crissinger, Eric Kurt, Heidi imker, Jim Dohle, Bill Ingram, James Whitacre, Martin Wolske. 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.” The 2015 Library Friends were Steve Witt, Mara Thacker, Lynne Rudasill, Laila Hussein Moustafa, Paula Mae Carns, Josh Harris, Amy Atkinson, Joe Lenkart, Rand Hartsell, Lisa Romero, Sue Searing, and JJ Pionke.

## **2. 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 Advisors. Paula Kaufman served as Interim Director of the Mortenson Center until July 31, 2015 while the University Library carried out a search for the next Director and Mortenson Distinguished Professor. She served on the search committee, and along with Susan was engaged in the active recruitment of strong potential candidates. This leadership transition year slowed the development of new Mortenson programs and partnerships. Initial discussions, which began with Paula and Susan, are now continuing with Clara. These discussions have resulted in Global

Connections, a new management development program, and a visit in November 2015 to the Bibliotheca Alexandrina to assess their professional development program and discuss areas of collaboration.

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. Fundraising 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. Paula has pursued potential gifts for fellowships to fund participants in the Associates Program, and is continuing these efforts. With the end of its Global Libraries program, we do not expect additional funding from the Bill and Melinda Gates Foundation after the SILL Project is completed. With 2016 marking the 25<sup>th</sup> anniversary of the Center, the Center has been approved to conduct a 25<sup>th</sup> anniversary fundraising campaign. We look forward to working with Scott Koeneman, Assistant Dean for Advancement and with Beth Sandore in her role as AUL for Research to identify alternative funding opportunities in FY16.

On December 2013 Arabella Advisors released its evaluation report of the Mortenson Center [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), which was generally highly positive of the Center's work. However, it also made recommendations for improving the Mortenson Center's impact. This year we focused on four of the eight high priority recommendations and will focus on the other four in FY16:

1. Add post-program support to increase alumni's chances of taking on leadership roles;
2. Orient programs toward preparing participants to take action upon returning home;
3. Further customize programs to better target participants' greatest needs;
4. Consider additional ways to work with partners to address gaps in offerings;

To respond to recommendations #1 and #2, Associates from the 2014 and 2015 programs were asked to develop a one-year action plan to apply innovation to practice. This action plan represented their leadership in applying lessons learned. Each plan was appropriate to the Associate's job role and institution, and could encompass a range of activities to be undertaken in the ensuing year, such as taking on leadership roles or additional responsibility, and introducing new policies, tools, services or resources. Center staff guided Associates in developing their plans and met with each one to finalize their plan before the returned home. Center staff will be following up with the Associates to assess their progress and offer guidance as needed during the year.

To address recommendations #3 and #4, 2015 Associates were asked to indicate their areas of most interest within the scope of this year's content coverage. Activities were adjusted accordingly and meetings were scheduled to allow Associates to meet with library experts in their interest area.

The Mortenson Center plans to embark on new initiatives and expand its reach, but we are challenged by our very small staff, which is fully engaged in operational, grant, and fundraising 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 are always cognizant of the Center's finances, we remain concerned about the growing costs of our programs for international librarians, thus our two FY16 programs (Associates and Global Connections) have been designed to maintain high quality, address the program needs of the distinct participants, and acknowledge the funding resources within their reach.

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

The most significant changes in FY15 are associated with staffing. Lindy Wheatley was promoted to Office Manager, freeing Susan from some operational activities in order to focus her energies to implement the SILL Project and other Center programs. Rebecca McGuire's expertise in information technologies respond to a needed skillset in the SILL Project. New Center Director Clara M. Chu has discussed with Paula Kaufman her continued engagement with the Mortenson Center. Paula has indicated an interest in participating in future Associate programs and in supporting fundraising efforts. Paula Kaufman has provided her vast experience, knowledge and network as Interim Director. Her leadership has been invaluable to the continued success of the Center, and we wish to duly recognize and thank her. The

transition for the new Director has been smooth due to the welcome and guidance provided by all the Center staff.

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

The librarians in the Mortenson Center were involved in 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 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, and to librarians in other countries.

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, they also benefit through their interactions as we all gain insights into cultures, different 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 Personnel*

Clara M. Chu

- Member of Association for Library and Information Science Education Board (Past-President)
- Member of Governing Board of the International Federation of Library Associations and Organizations (IFLA)
- Governing Board Liaison of the IFLA Committee on Standards
- Vice-Chair of IFLA Professional Committee
- Chair of IFLA Division IV
- Treasurer, IFLA Section on Education and Training Standing Committee
- Member, National Coalition to Advance Learning in Archives, Library and Museums <http://coalitiontoadvancelearning.org/>
- IFLA Liaison of the Chinese American Librarians Association (CALA)
- Member of the 2015 CALA President's Conference Program Planning Committee
- Member of the Asian/Pacific American Librarians Association 35<sup>th</sup> Anniversary Symposium Keynote Planning Committee
- Member of the *Journal of Library and Information Science* Editorial Board
- Chair of the Mortenson Center Advisory Committee
- Member of Area Studies Division (University Library)
- Member of the International Achievement Awards Committee (UIUC)

Paula Kaufman (on leave FY15, retirement 21 August 2015)

- Member of Search Committee for Mortenson Distinguished Professor
- Chair of Search Committee for the Mortenson Visiting Instructional Technology Specialist
- Member of Advisory Committee, UIUC Center for Global Studies
- Member of the Champaign Public Library Board
- Member of the Abraham Lincoln Presidential Library and Museum Advisory Committee
- Member (non-voting) of the board of the Digital Preservation Network
- Member of Elsevier Foundation Board
- Member of National Advisory Council, Buros Center for Test Measurement
- Member, OLLI NEH Committee

Susan Schnuer

- Member of Advisory Committee to the AUL for User Services
- Member of Staff Development and Training Advisory Committee
- Member of Areas Studies Division
- Member of ITEC
- Member of Search Committee for the Mortenson Center Visiting Instructional Technology Specialist
- Member of Fundraising Committee for ALA's International Relations Round Table
- Corresponding Member of IFLA's Continuing Professional Development and Workplace Learning Standing Committee

Rebecca McGuire

- Technology and e-Reader Volunteer at the Champaign Public Library
- Library Volunteer at the Siores Primary School and Muchas Manos Light Work Project (Nicaragua)

Lindy Wheatley

- Member of Wellness Subcommittee of the Staff Development and Training Advisory Committee. Designed Pedometer Challenge bookmark.
- Graphic designer of GREAT Customer Service Guidelines materials <http://www.library.illinois.edu/administration/services/great.html>

### Publications

- *Mortenson Center Newsletter*, published two editions: August 2014 and March 2015 <http://www.library.illinois.edu/mortenson/newsletters/index.html>
- The Mortenson Center has increased its use of social media (see below in II. Statistical Profile). Moreover, in addition to our Facebook page, different cohorts of Mortenson Associates have created their own Facebook groups to continue their engagement beyond their participation during their particular Associates Program at the Mortenson Center.

## **5. Progress on Unit Goals for FY2015**

1. Prepare to transition smoothly to new leadership.

To ensure a smooth and successful transition, three components were put in place:

- (a) seasoned interim leadership and consistent staff
- (b) Center staff participation in the search process, and availability to address candidate questions
- (c) keep new Director abreast of Center activities and provide support in transition to CU

2. Define more clearly Paula Kaufman's role and integrate her into the Mortenson Center's work after she completes her assignment as Interim Director.

Paula Kaufman finished her term as Interim Director and retired from the University of Illinois at the end of August 2015. She will continue to participate in Mortenson Center activities, such as the Associates Program and fundraising, based on the needs of the Center and her availability. The Center has had an excellent year under her leadership, creating a supportive working environment for the work and staff to flourish. Paula cannot be thanked enough.

3. Prioritize and focus on the highest priority recommendations offered in Arabella Advisors' report.

During FY15, the Center focused on recommendations 1-4 and our activities to address them are described in "2. Review of Major Challenges." We will assess how well our interventions worked and will adjust our activities as needed in FY16.

4. 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.

Susan, as PI on the Gates Foundation Grant "Strengthening Innovative Library Leaders (SILL)", submitted a successful proposal, and the Center was awarded \$521,014 in November

2014. Rebecca McGuire and Rebecca Teasdale have been hired on the grant for their expertise on information technologies and assessment, respectively.

5. Continue to work with READ Global to develop and implement appropriate programs.

Susan returned to visit READ Global in Bhutan, India, and Nepal to observe the training offered to community librarians and to work with the trainers to evaluate the training.

6. Offer the Mortenson Associates program in late spring 2015.

The Mortenson Associates program was offered in May 28 - June 23, 2015, with 12 participants from six countries. 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.

7. 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.

Susan and Rebecca Teasdale visited public libraries in Namibia to help the National Library and Archive Services (NLAS) determine how to move forward with professional development programs for public librarians. This visit led to a successful partnership with NLAS on the SILL project.

8. 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.

Paula Kaufman, Jeff Schrader, Bill Mischo, and Susan Schnuer all attended the conference organized by NIT Silchar in Assam India in January 2015. Everyone gave keynote speeches and delivered workshops. The status of this Program will be reviewed in FY16.

9. 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.

Two external awards were received in FY15 as a result of initiatives led by Susan Schnuer:

- A Gates Foundation Grant of \$521,014 for the *Strengthening Innovative Library Leaders* (SILL) Project (see above)
- A \$10,000 grant to support the Building Global Bridges Program (FY15-FY18), funded from the Center for Global Studies Title VI US Department of Education Grant as a National Resource Center in Global Studies. Nadia Pompeo de Camargo Salles from Brazil was the first beneficiary program and received a fellowship to attend the 2015 Associates Program. The second fellowship will be awarded FY18.

Paula Kaufman focused FY15 fundraising efforts on obtaining fellowships for the Associates program, and she is continuing to lend her support in these efforts. A fundraising campaign as part of the Center's 25<sup>th</sup> anniversary activities will be a priority in FY16.

10. 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.

There was an attempt to start planning a training program around research data, but then we turned our attention to the planning of training for national and regional libraries. The Global Connections Program was initiated by Joe Lenkart and was developed in collaboration with Steve Witt, both of the International and Areas Studies Library. The inaugural program will take place October 9-19, 2016.

11. Identify and support opportunities for Mortenson Center staff to develop professionally.

When Paula, Susan and Clara, or any staff become aware of professional development activities, they are recommended and accommodated to take advantage of these opportunities. Lindy Wheatley in her new role as Office Manager is being encouraged to gain new knowledge to grow into her job.

## 6. Unit Goals for FY2016

The University Library's strategic plan is still in its development phase, thus for FY16, the Mortenson Center's goals are guided by its own mission, which correspond to Goal II (Provide transformative learning experiences) of the University's strategic plan. To a lesser extent, FY16 Center goals will correspond to the University's other goals:

Goal I: Foster scholarship, discovery and innovation

Goal III: Make a significant and visible societal impact

Goal IV: Steward current resources and generate additional resources for strategic investment

The Center was founded in 1991 which makes the year 2016 the Center's 25<sup>th</sup> anniversary. Thus, in Y16 there will be a renewed focus on fundraising, activities to give the Center increased visibility, use of information and communication technologies to expand the Center's reach, and celebration of its many achievements.

### Mortenson Center FY16 Goals

1. Celebrate the Center's 25<sup>th</sup> anniversary. The year of celebration will be launched at the 25th Annual Mortenson Distinguished Lecture, October 27, 2015. Three key components of the 25<sup>th</sup> anniversary activities will be fundraising, engagement and access. A committee will be formed to support the fundraising campaign and anniversary celebration.
2. 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. The fundraising plan will be tied to the 25th Anniversary fundraising campaign.
3. Strengthen the Center's communication channels: redesign Center's website and participate as a pilot in the University Library's web redesign process, leverage social media, review the Center's publications (e.g., newsletter and annual report) for content, format and dissemination.
4. Introduce new initiatives that allow the Center to realize its mission of promoting international education, understanding, and peace, which include a webforum series, focusing on international dialogue on library issues, learning about international library issues, and sharing of best practices, and a web portal to foster a Library Peace Action Day on September 21<sup>st</sup>, starting with International Peace Day 2016.
5. Develop and Implement Center programs
  - a. Offer the Mortenson Associates program in May/June 2016. This is the signature Mortenson Center program and many UIUC librarians and colleagues in the University Library around the state of Illinois assist in teaching and hosting the visitors
  - b. Prepare to deliver the new Global Connections program in October 2016
6. Implement the SILL Project.
7. Review ongoing partnerships (IFLA/OCLC Fellows, NIT Silchar) and explore new initiatives with current partners (OCLC) and new ones (Bibliotheca Alexandrina).
8. Focus on the remaining four highest priority recommendations offered in the Arabella Advisors' report (December 2013) and assess the effectiveness of the solutions implemented in FY15 for the first four highest priority recommendations.
  1. *Refocus and better communicate the Center's approach to technology and fund-raising*
  2. *Plan for the Center's sustainability and future success*
  3. *Use evaluation data to describe the Center's work*
  4. *Conduct more intentional outreach and marketing to extend the Center's reach*
9. Seek opportunities to promote the activities and support the work of the Center, and recruit to its programs. These include visits with organizations and recruitment activities in Spain, South Africa, Thailand and China.

10. Participate in strategic planning to align the Center’s work with the new Library Strategic Plan.

## II. Statistical Profile

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### 1. Facilities

User seating counts

- At tables 8
- At public workstation 1
- Informal/other 4
- Conference room 19

Number of hours open to the public per week

- 45 (M-F)

### 2. Personnel

Name	Type	FTE	Period of employment
Clara M. Chu	Faculty	1.0	1 June 2015-30 June 2015
Paula Kaufman	Faculty	1.0	1 July 2014-30 June 2015
Susan Schnuer	Academic Professional	1.0	1 July 2014-30 June 2015
Rebecca McGuire	Visiting Instructional Technology Specialist	1.0	1 March 2015-30 June 2015
Lindy Wheatley	Office Support Specialist Office Manager	1.0 1.0	1 July 2014-3 Jan 2015 3 Jan 2015-30 June 2015

### 3. User Services

	Group Presentations	Participants in Group Presentations
On campus	7	71
Internationally	13	610

Other Presentations

Clara M. Chu 1; Paula Kaufman 5; Susan Schnuer 9; Rebecca McGuire 5

### 4. Optional Statistics: Social media use

Facebook <https://www.facebook.com/mortensoncenter> (est. September 9, 2009)

- FY15 Page Likes 222
- Average Daily Reach 58

Twitter <https://www.facebook.com/mortensoncenter>

- 134 followers

Website <http://www.library.illinois.edu/mortenson/>

- no statistics