

# MPLA Leadership Institute | April, 27 – May 2, 2014

YMCA of the Rockies - Estes Park Center | Estes Park, CO

## Final Report

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### Participants and the Application Process:

Of the 63 applicants from member states, the following filled the 30 available participant slots

<http://mpla.us/leadership/2014.html>:

- Arizona: Erin MacFarlane, Dale Savage, Deborah Chavez, Ann Leonard
- Colorado: Annie Epperson, Laura Ruttum Senturia, Nicanor Diaz, Stephen Sweeney
- Kansas: Maribeth Turner, Jennifer Schroeder, Jon Guillian
- Montana: Lauren McMullen
- North Dakota: Janet Anderson
- Nebraska: Tina Walker, Jake Rundle, Holli Duggen, Jayne Germer
- Nevada: Ann-Marie White, Sena Loyd
- New Mexico: Cristin Haake
- Oklahoma: Tim Miller
- South Dakota: Brenda Hemmelman, Mary Francis, Melissa Clark
- Utah: Elizabeth Smart, Jennifer St. Clair, Lyndi Hatch, Elizabeth Woolcott
- Wyoming: Darcy Acord, Cheryl Goldenstein

Some states had very few applicants (1-4), while others had a very high number (10-12). A few applicants dropped out before selections were made. During the application evaluation period, some were found to not qualify due to lack of library experience or no membership in a member state association. These were the 2014 criteria:

- Employed in a library organization in MPLA's 12-state region
- Current member of one of MPLA's 12 affiliated state library associations
- Minimum of 5 years in a library-related job with progressive experience
- Record of experience that demonstrates leadership potential
- Expected continued contribution to the profession
- A thoughtfully completed application
- Two letters of recommendation

The MPLA Leadership Institute (LI) Committee and I drafted the application. Then the 12 state MPLA representatives (state reps) gave us feedback on how to improve the form including adding word limits to narrative answers in an attempt to equalize content received in those areas. This seemed to have worked well. A few state reps also offered a scoring sheet that was tweaked and shared with all 12 state reps to utilize in the selection process. Each state rep developed a committee of about 3 members from their respective state associations with the task of recommending 2-4 top candidates from their state. They all found the scoring sheet to be very helpful during this tough decision-making process.

I stored all of the application files in Google Drive folders for each state and shared them accordingly. There were a few glitches in the event when a state committee member did not have a Google account. I would utilize Dropbox next time.

There had been a prior decision to require 2 years of membership in MPLA in order to take advantage of the member discount. However, that decision got lost in the communication mix and therefore, did not make it onto the application as a requirement. If this is still the decision, I'll be sure it is reflected on all materials (including website) for next time.

The LI committee chairs and I ended up not putting a heavy emphasis on an MPLA membership requirement. We saw this rationale as a way to gain members. We chose some applicants for acceptance into the 2014 Institute based on their interest in becoming involved in their library associations, including MPLA (in addition to their other qualifications). Talking to several participants who were not MPLA members, I learned that they had thought about becoming members from time to time, but just hadn't done it. Through the LI experience, and knowing that many participants were also board members, they were excited about attending conferences and paying membership dues.

The post Institute survey told me that the majority of participants found that the application process went smoothly and they had enough time to apply. This is the timeline we followed:

- **July:** Notice of the Institute and posting of the application requirements first went out
- **September:** Started receiving applications and distributed informational postcards at the MPLA/NDLA/SDLA conference. Judy printed the postcards as photos for a minimal cost
- **November 1:** Application deadline
- **December 1:** Deadline for state associations to make their selections
- **December 15:** Deadline for LI co-chairs and I to make final selections and notify all applicants regarding the status of their applications
- **January 6:** Deadline for invited applicants to respond with an RSVP and to provide additional requested information
- **March 15:** Due date for participant payment. They were invoiced in early January

#### Recommendation:

- Keep timeline.
- Select 3-5 "runners-up" in the event that an applicant must rescind acceptance. This year, one applicant had to do so. We were able to fill the slot, but it would have been easier with a pre-determined, prioritized list of applicants to call on.
- Keep requirements the same (clarify years of MPLA membership)
- Ask for all of the preferred contact information up front on the application, including the emergency point of contacts, even a photo and a short biography. It will save time and emails trying to track it all down later.
- Consider an electronic form for the application and functionality that dumps information from each field into an "exportable" excel file (perhaps this is wishful thinking). It takes a lot of time to record all of the name and contact information separately (not to mention the increased chance for typos, etc.) toward the end when 20 com in within 24 hours.
- 30 applicants is a good number, stick with this – Maureen, our facilitator agrees.

- Start advertising now for the 2016 institute (even if the exact date isn't set). The focus would be the MPLA membership requirement – especially if we implement the 2-year membership requirement next time for reduced fees.

**Mentors:**

1. Dana Braccia, Regional Manager, Library Systems & Services, Phoenix, AZ
2. Dan Chaney, Associate Professor, Oklahoma State University Libraries, Stillwater, OK
3. Eric Norris, Director, Hays Public Library, Hays, KS
4. Holly Phillips, Electronic Resources Coordinator, University of New Mexico, Albuquerque, NM

Recommendations for 2016:

- Wendy Wendt, public library director, Grand Forks, ND
- Annie Epperson, reference librarian, university library, Greeley, CO
- Rob Banks, public library director, Topeka, KS
- Ask a member from a special library and a school library (or a librarian in youth services) as well so that all library types are represented
- Invite 4-5 mentors. Maureen felt that more than 4 mentors would be better (perhaps it was traditional to have 5?)
- Do more to prep mentors on what to expect and what their roles are (now that I am more familiar with the process, I can do a better job of this next time) and share this more with the participants so that they fully understand. It came out in the survey that some participants were unsure what the mentor's roles were

**Agenda and Institute Content:**

The agenda worked out pretty well. Maureen, of course, did wonderfully and participants had nothing but good things to say about her content, approachability, and presentation style.

Our major sponsor, Innovative Interfaces, negotiated with us to send a representative to speak to the group about the future of libraries and technology. There were mixed feelings among the participants which came out in the survey. Overall, they understood why he was there, they just thought in interrupted the flow of the day. Due to the sponsor's schedule, they needed to speak to the group early in the week, so Joe Murphy spoke at about 10:00 am Tuesday morning. Maureen worked with Joe to find the best time.

There was also no MPLA board meeting held on Thursday, so that day was completely open to fill with content. The mentors and I arranged for a loose agenda Thursday in order to adjust it based on early week discussions and what else the participants wanted to cover. Maureen helped to gather topics of interest for further discussion, and each mentor and my lead the discussions. After lunch, we had one more discussion based on trends and issues for each of the library type represented. These went well.

A few participants in particular were antsy to get home to family and work obligations that were turning up, so they left Thursday at lunch. By then, participants were pretty burned out and the weather finally turned nice, so we adjourned at about 3:00 and many joined up for a hike, others found other recreational activities or packed and prepared for early departures.

Presentations on Wednesday evening went really well. Energy in the room was high and everyone seemed to have fun with it. Because there were a few birthdays in the crowd, we celebrated afterward

with cake and games. This was a great way to take a mental break and celebrate all of the focus and hard work. It almost felt like the Institute could have naturally ended at that point or by noon on Thursday—something to consider for next time. It would help with expenses, too. The survey revealed mixed feelings regarding the length. About half of the respondents (27 total responses) said it was too long, while the rest said it was just right.

#### Recommendations:

- Interject planned social activities throughout the week. There is a nice little library in Estes Park, plus the historic Stanley Hotel where MPLA had its first board meeting – these would be excellent options for a tour one free evening or on Thursday. Transportation would have to be arranged in advance.
- Nearly half of the participants also enjoyed a refreshing hike on Thursday afternoon – attempts to arrange a group hike at some point during the week would be great to do.
- Utilize a tool like LiveBinders for the coordinator and facilitator to manage binder content (there were a few oversights regarding binder layout and expectations.)
- Ask for all binder material at least 3 weeks in advance of the Institute so that printing can be arranged in a timely manner and contents can be verified.
- Consider shortening the Institute

#### **Venue and Logistics:**

The originally-set 2014 LI dates overlapped with National Library Legislative Day. It is agreed that this would be an important event with which to avoid scheduling conflicts. Luckily we were able to adjust the LI dates this year, but will need to take care not to run into conflicts again. Unfortunately, I don't see that the NLLD dates are advertised in advance. Perhaps contacting ALA for dates is a possibility prior to setting the 2016 LI dates.

YMCA staff were always so friendly and responsive to our needs. The facilities were perfect for the LI. Participants either had no opinion or held a favorable one regarding having a roommate. Maureen and participants who arrived well before 3:00 were unable to check into rooms early since they were booked as one group reservation. One of the arriving shuttles lucked out and were delivered directly to our lodge because LI participants were the only riders. All of the departing shuttles also picked up our riders directly from the lodge. This was a huge help. It is not guaranteed that this can happen every time, but is a possible negotiation with drivers.

We were able to utilize a small dining room (the Walnut room) for all of our meals rather than being in the large, noisy Aspen dining room. Participants really appreciated this. Although it is not always a possibility, I recommend asking the YMCA for this.

Our meeting space and sleeping rooms were all in one lodge (Long's Peak) and that was very convenient, but I understand that the YMCA makes these assignments based on their bookings a few weeks prior to arrival.

### Recommendations:

- Continue holding the LI at YMCA of the Rockies, Estes Park Center as long as it is feasible
- Work with the venue to find a reservation process that would allow early arrivals to check in early provided the room is ready
- Consider having participants sign up for airport shuttles at 10:00, 1:00 and 3:00 to try and take advantage of discounted group bookings. MPLA could pay the bill and the cost is passed on to participants who need this transportation option. This would make it more likely that the shuttle drivers will be able to drop off participants directly at the lodge.
- It was suggested by participants to have a Facebook group for LI graduates. I support the idea of starting a private group and invite all LI classes. This would be an easy forum via which to communicate with all graduates regarding conference events and future LI fundraising activities. Plus, everyone would be able to communicate with one another and stay in touch. Emails change too easily for us to try and maintain a reliable list of contacts long-term.

### **Budget:**

According to my tracking, expenses exceeded income by about \$2,400 during the duration of the 2013/14 planning process. I found the best prices for supplies and refreshments through Sam's Club and Amazon.com. I have some remaining supplies like printer paper, plates, napkins, markers and a large flip chart that I will hold onto for next time.

I recommend starting active fundraising now for the 2016 institute as companies and institutions have varying fiscal years and may need to plan ahead to time donations in ways that work best for them.

One of the mentors suggested to me that small coordinator contract might be helpful to keep momentum going and help handle details and early preparations in the off years – food for thought.

Overall, things went really well and participants left with positive remarks and experiences. I enjoyed being able to coordinate this event and would love the chance to do it again.

### **Attachments:**

1. Budget
2. Agenda