

## MPLA 2012 Library Institute

### Coordinator - Final Report

*Judy Zelenski - July 17, 2012*

The MPLA 2012 Library Leadership Institute was held May 6-11, 2012 at YMCA of the Rockies in Estes Park, Colorado. Thirty attendees representing all 12 MPLA states attended, along with four mentors, one Polymathic factotum, and one facilitator. The coordinator and polymathic factotum also served as mentors. See Appendix H for list of participants. See <http://www.mpla.us/leadership/2012.html> for list and photos of the participants and mentors. Mentors were:

- Mickey Coalwell
- Adriane Juarez
- Valerie Nye
- Robert Shupe
- Dan Stanton (also serving as Polymathic Factotum)
- Judy Zelenski (also served as Coordinator)

We could not have done this Institute without the \$15,000 support of the Gerald Kline Family Foundation (Innovative Interfaces, Inc and SkyRiver). The Emporia School of Library and Information Management provided \$2,000 support for the mentors' travel, and the University of Arizona School of Information Resources and Library Science provided \$1,000 advertising support. Also, thanks to donations to the Friends of the Library Leadership Institute from several MPLA members, each participant received a copy of Maureen Sullivan's new book *Developing Library Leaders*. Bookplates recognize their support. Contributors are:

- Marilyn Hinshaw - 2002 Founding Leadership Institute Committee Chair
- Debbie Iverson - 2002 and 2005 Institute Mentor
- Karen Chobot - 2002 Institute Fellow
- Kirsten Clark - 2004 Institute Fellow
- Jean Hatfield - 2005 Institute Mentor
- Robert Shupe - 2005 Institute Fellow; 2012 Institute Mentor
- Mickey Coalwell - 2006 Institute Fellow; 2012 Institute Mentor
- Sharon Moreland - 2006 Institute Fellow
- JaNae Kinikin - 2007 Institute Fellow
- Heidi Sue Adams - 2007 Institute Fellow
- Tom Taylor - 2010 Institute Fellow
- Elvita Landau - 2010-11 MPLA President
- Judy Zelenski - 2007 Mentor, 2010 & 2012 Institute Coordinator

Co-Chairs of the Leadership Institute Committee, Dan Stanton and Adriane Juarez, were invaluable in planning and implementation! Both attended the Institute.

## Income & Expense for 2012 Institute, compared with 2007 and 2010 Institutes

### Leadership Institute 2012

#### Income

Participant Fees	\$17,557.85 (net after PayPal fees; Raise by \$100 this year; MPLA members \$550; non-members \$650)
Sponsorships/Donations	\$17,781.55 (over 2 years)
TOTAL	\$36,339.40

#### Expense

YMCA of Rockies	\$15,556.00 (over 2 years - deposit paid in 2011)
Facilitator	7,500.00
Coordinator	5,382.50 (included in Exec. Sec. salary over 2 years with FICA)
Travel	2,087.58
Supplies/printing	1,137.29
Books for participants	2,166.00 (Maureen Sullivan's Developing Library Leaders)
TOTAL	\$33,829.37

No MPLA subsidy; Income over expense = \$2,510.03

### Leadership Institute 2010

#### Income

Participant Fees - \$14,117.05
Sponsorships - \$3,250.
TOTAL - \$17,367.05

#### Expense

YMCA of Rockies - \$13,279.
Facilitator Fee - \$7,500.00
Misc (travel & supplies) - \$2,063.69
Coordinator - \$0
TOTAL - \$22,842.69

Difference: MPLA subsidy 2010: \$5,475.64

### Leadership Institute 2007

#### Income

Participant Fees - \$14,288.48
Sponsorships - \$10,000.
TOTAL - \$24,288.48

#### Expense

Ghost Ranch - \$16,156.20
Facilitator Fee - \$7,500.00
Misc (travel & supplies) - \$3,917.21
Coordinator - \$6,000.
TOTAL - \$33,573.69

Difference: MPLA subsidy 2007: \$9,285.21

Maureen Sullivan, nationally known organizational development consultant, agreed to facilitate the 2012 Institute without an increase in her past fees. She has over 25 years experience in leadership development, helped establish the ACRL/Harvard Leadership Institute, and is a faculty member for its annual program. Shortly after the Institute she became ALA President.

The call for applications went out in July, with a November 1 deadline. I created a promotional flyer for state conferences, sent information to MPLA State Reps, to the MPLA membership, and to PR contacts and state newsletters throughout the region.

The criteria for applicants:

- 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

Fifty-two applications were received for the 30 available slots. I created a database of all applicants and letters of recommendation, and confirmed receipt of applications and recommendations by e-mail. MPLA state representatives along with state association presidents and some state librarians reviewed the applications and made recommendations for selection. The Leadership Institute Committee reviewed the recommendations, selecting two participants from each state plus six at large, except in the case of one state with only one applicant. Dan Stanton send notifications to all participants, including those not invited and those on waiting list. One who was selected declined because of scheduling conflict. All others accepted. Link to the application form: <http://www.mpla.us/leadership/index.html>.

In past years we received many applicants who were not members of their state library associations, which is a requirement. This year we made this specific in the application itself and received only one application that didn't meet this requirement.

Registration fees were raised by \$100 this year; cost for MPLA members was \$550; non-MPLA members \$650. This included room and all meals. Attendees paid for their own transportation costs. Some individual libraries and state associations assisted attendees with registration and/or transportation costs. It was up to the individual attendees to pursue these or other sources of financial assistance.

As coordinator, I managed the applications and state evaluation processes, then continued communication with participants at the same time handling event logistics. I include the following detail for the benefit of future Coordinators and for the use of the Leadership Institute Committee in developing a position description. Tasks involved:

- Publicity
  - Wrote articles for newsletter, both before and after institute

- Sent news release information to state reps for distribution and publication
- Provided handouts for state association conferences (See appendix B & C)
- Wrote articles for MPLA Newsletter (See appendix E)
- General correspondence with board, facilitator, applicants, and participants
  - Well over 1,000 emails in approximately 6 months.
  - Coordinated travel arrangements with Facilitator and mentors
  - Corresponded with sponsors regarding ads, travel arrangements, and recognition
  - Updated board on progress of Institute
- Conference calls
  - With Leadership Institute Committee co-chairs
  - With Mentors
  - With Facilitator and mentors
- Receive applications and Letters of Recommendation
  - E-mail acknowledge of each application and letter of recommendation upon receipt
  - E-mail updates to applicants regarding application status (weekly the last month before deadline)
  - E-mail confirmation to applicants when application complete
  - Answer applicant questions (lots of them) and refer to Committee Chairs when appropriate
  - Database of all applicants with contact information, including degrees, years of experience, type of library position, type of library, state association membership and MPLA membership.
  - Update Committee Chair on progress of applications
- Applicant Evaluation Process
  - Send applications, letters of recommendation, and evaluation forms to State Reps for state committee recommendation.
  - Receive evaluation forms
  - Compile evaluations into database
  - Provide evaluations and information on each applicant to Leadership Committee Chairs
  - Work with LI committee on final selections
- Set up database of Selected Participants with all contact information, position, library, etc.
- Invoice all participants. See appendix G for sample invoice.
- Compile emergency contact information for each participant
- Identify participants with special dietary or mobility needs

- The YMCA offered regular, vegetarian, and vegan choices for every meal. For the two gluten-free participants a small refrigerator was provided in their rooms, though most meals offered many gluten-free items as well.
- The Lodge was chosen for 2012 to be closer to the dining hall, with a shorter and less-steep walk than in 2010.
- Set up roommates
  - At the direction of the Leadership Institute Committee, I matched roommates first by gender, then by type, size, and similar geographic (rural, urban) library. I did this with an Excel database sorted by these criteria. I then sent e-mails to each pair of roommates with contact information so they could correspond in advance of the event. It worked for the most part.
  - Because in 2010 there was a high level of participant anxiety about rooming arrangements we were prepared to accommodate single rooms requests with participants paying the difference directly to MPLA. The cost would be an additional \$250. We didn't advertise this option and there were no requests. Evaluations suggest should continue to be an option. Perhaps it should be advertised in advance.
  - Compiled a list of roommates with contact information for the YMCA in advance of the Institute.
- Set up e-list for communication
  - I set up an e-list through MemberClicks for communicating with participants.
  - Created an Information sheet for participants and mentors and sent it to participants soon after they were selected (See appendix D)
  - Designed and distributed sample press release for participants to use with local media (See Appendix F)
- Coordinate online introductions
  - Coordinated process using e-list for participant introductions.
  - Compiled introductions into document for board members in advance of their reception with participants
  - Dan Chaney, another person who was invaluable to the Institute, set up a page to post the list of participants and photos. It was helpful to match photos with names and then with their e-mail intros. See <http://www.mpla.us/leadership/2012.html>.
- Set up timeline with Maureen Sullivan
  - Reading list for distribution - sent early to participants
  - Materials for notebook. Most were sent electronically, but a few were mailed in paper format.
  - Travel and shuttle arrangements
- Compile YMCA information for participants
  - Sent participants links to YMCA of Rockies online information

- Kept participants informed about weather in Estes Park
- Sent link to YMCA map to participants
- Transportation
  - Provided information about shuttle service from DIA to Estes Park
  - Made sure participants knew how to plan flights to arrive at institute at appropriate time
- Financial
  - Worked closely with Executive Secretary (this year we were the same, but in future years financial matters will be handled separately)
  - Kept database of payments for Institute (Future institutes: Coordinator will do invoices; Executive Secretary will receive payments)
  - Obtained authorizations and wrote checks for expenses (Future institutes: Coordinator will submit requests and provide receipts to Executive Secretary who will write checks)
  - Monitored budget and provided reports to board (Future institutes: Coordinator will do this with information provided by Executive Secretary)
- Format agenda for printing
  - See appendix A for copy of 2012 Institute Agenda
- Prepare Notebook and all handouts
  - Received all materials from Maureen Sullivan, both electronically and by last-minute mail
  - Ordered binders, tabs, spine labels. Researched prices for notebooks and tab dividers online, including free shipping, saving considerably over local store prices. In order to save money I used card stock for section separators and purchased printable adhesive spine labels.
  - Arranged for tax-exempt form from Office Max and had copying done there.
  - Designed bookmarks for notebooks.
  - There is a lot of last-minute assembly required to collate and assemble over 8,000 pages into sectioned notebooks, box them up, and load them into truck. (Dolly definitely recommendation for transporting everything)
  - Handouts included
    - Introduction
      - Biography of Maureen Sullivan
      - Participants List with contact information
    - Leadership
      - Leadership - Some definitions
      - Leadership - An Introduction
      - Working with Emotional Intelligence
      - Resonant Leadership
      - Trusted Leader

### Change

- Some Observations on Change
- Transforming and Leading Change

### Communicating

- Some Principles of Effective Communication
- Guidelines for Active Listening
- Guidelines for Dialogue
- Communicating in Difficult Conversations

### Influencing

- Influencing for Positive Outcomes
- Your Personal Power and Your Circles of Influence

### Managing Differences

- Collaborative Negotiation Guidelines
- Conflict Resolution

### Teamwork

- Team Work Guidelines
- Ground rules worksheet
- Characteristics of Effective Meetings
- Tools for Group and Team Facilitation
- Project Management

### Commitment

- Coaching
- What is Counseling
- Mentoring Relationship

- Design bookplate recognizing Friends of Library Leadership donors - for Maureen Sullivan's book
- Design certificates for participants to be given upon completion
- Work with mentors on topics for facilitation and presentations
  - E-mail and conference calls
- Create printed name badges
  - Important: Use a type font that can be seen from across a room! I use First Names VERY LARGE, with last name and home state in smaller font, but still readable from a distance.
  - Created table tags with same information and VERY LARGE print, both sides.
- Liaison for YMCA of Rockies
  - Sent rooming lists in advance
  - Obtained shuttle recommendations in advance
  - Solved logistical problems during Institute, such as : Stopped toilet; One room was double assigned by YMCA; Toilet paper ran out in one bathroom; Napkins ran out in

coffee bar; The Y staff was completely responsive and took care of these and more within minutes.

- Handle logistics, introductions, announcements during Institute
  - Available for participant concerns of any type
  - Made announcements at each session
  - Assisted Maureen in necessary set-ups or room changes
  - Hauled cases of water and boxes of snacks
  - Met with mentors as needed
  
- Mentor duties
  - Facilitated discussions
  - Made presentation
  - Mentoring appointments with participants
  - Met with other mentors and Maureen
  
- Provide and set up snacks and water
  - Because of altitude it's important to drink lots of water. I obtained a tax-exempt certificate for Wal-Mart and bought 12 cases of water along with snacks. I also ordered some snacks online through Amazon at a discount. Water was running low so I went to Safeway in Estes Park for 4 more cases, which were also available for the Board events.
  - Because last year the "healthy" snacks didn't go over too well I provided more Oreos, M&M's and Skittles which were really popular - balanced with almonds and dried fruit. I packed snacks in boxes labeled for each break. After the Institute I donated the leftover items, mostly granola bars, to the local food bank in Lakewood.
  
- MPLA Board Meeting
  - Coordinated schedule and arrangements for Board reception and dinner with participants on last day of institute.
  
- Evaluations
  - Compiled survey responses to Evaluations from participants and mentors
  - Wrote summary reports for Board

**Finally:**

I was an Institute Mentor in 2007 and Coordinator for 2010 and 2012, but as much fun it would be to continue I am ready to turn the Coordinator's position over to someone else. It's been a fantastic experience. Actually it's been "life-changing" as many past participants and mentors agree. I will assist a future coordinator in every way. **Many thanks to everyone for all your help!**

Judy Zelenski, 2012 MPLA Leadership Institute Coordinator  
14293 W. Center Dr., Lakewood, CO 80228  
303-985-7795; [execsecretary@mpla.us](mailto:execsecretary@mpla.us)