

Program Summary:
THINKING OUTSIDE THE BORDERS: LIBRARY LEADERSHIP IN A WORLD COMMUNITY
Phoenix, Arizona -- February 18-20, 2007

Planning:

The Arizona State Library began plans for *Thinking Outside the Borders* in spring 2006 in discussions with the Mortenson Center for International Library Programs of the University of Illinois and the Illinois State Library.

The Phoenix program was scheduled for February 18-20, 2007 to leverage the *Transborder Library Forum*, another international library conference, beginning the evening of February 20 in the Phoenix metro area.

Planning continued with representatives from the Arizona State Library attending the *Thinking Outside the Borders* pre-conference at ALA – New Orleans in June 2006. A draft agenda for a shorter, two-day program was created at this time.

Joan Clark was assigned as Program Director in September 2006 with responsibility for finalizing the Arizona program. Communication about the program went out in September 2006. The agenda was still in draft phase pending Joan's participation in the November 2006 four-day *Thinking Outside the Borders* program at the University of Illinois in Urbana-Champaign, IL.

Several update and planning calls were held with Barbara Ford, Susan Schnuer and Jane Kolbe to review progress on communication, applications, participant selection, speakers and agenda.

Call for Participants:

On October 13, 2006, an email went out through a variety of listservs, along with formal and informal distribution lists. The email provided a link to more detailed program information and the application form <http://www.lib.az.us/extension/thinking.outside.the.borders.cfm>.

News spread quickly around the world, and we received the first application two days later. In total we received nearly 60 applications from outside the US.

Participant Selection Process:

Non US Applications Received by Nov. 15, 2006: 47

AZ Applications Received by Nov. 15, 2006: 18 (all were accepted as either participants or alternates). See "Directory of Participants" in Pocket 1 of the Participant Package.

On Nov. 17, 2006, the six members of the AZ State Library, Library Development Division reviewed 47 complete applications from non US librarians (some of the applications were incomplete or late and not considered). The review used the same criteria as previous programs. Points were awarded by category, e.g., demonstration of leadership. Consideration was given for type of library, experience and region. Alternates were selected and kept informed on all program updates. In the end, two non US alternates were needed.

All applicants were informed of their selection or non-selection by Dec. 15, 2006. Selected, participants received more detailed program information, background reading and travel logistics. Regular email correspondence continued until the program.

Agenda:

The first two *Thinking Outside the Borders* programs (Sept. 26-29, 2005 and Nov. 7-10, 2006) provided a framework for developing the shorter Arizona program agenda. [Please consult Debra Wilcox Johnson, grant evaluator, for a more thorough comparison of the first two programs and the AZ program.] The first two programs were four days versus the two day AZ program.

A comparison of the Nov. 2006 and the Feb. 2007 programs follows:

Given the shorter program several elements were modified:

- ▶ Individual presentations were shortened
- ▶ Campbell Leadership Descriptor introduction was shortened
- ▶ Harry Triandis' presentation on Cross-Cultural Communication was eliminated
- ▶ Pamoja learning activity was eliminated
- ▶ Disaster Preparedness review was eliminated

Key topics and speakers from the Nov. 2006 were repeated in the Arizona program:

- ▶ Leadership Characteristics (the Campbell Leadership Assessment) – Mary Ann Mavrinac
- ▶ Multiculturalism – Sandra Rios Balderrama
- ▶ Global Library Advocacy – Carol Brey-Casiano
- ▶ Partner Planning (modified format)
- ▶ Non US speaker (modified to participant panels in lieu of one speaker)

New topics and speakers for the Arizona program: (see agenda in Pocket 2 of Participant Panel)

- ▶ GladysAnn Wells, Director, Arizona State Library, Archives and Public Records
- ▶ George Smith, Associate Deputy Director for State Programs, U.S. Institute of Museum and Library Services, gave the welcome and represented IMLS, the source of grant funds
- ▶ Bob Martin, Professor, School of Library and Information Studies, Texas Woman's University and former director of the U.S. Institute of Museum and Library Services. Under Dr. Martin's leadership, IMLS focused on representing the U.S. in international discussions of libraries and museums. He shared his insights with the group.
- ▶ Yolanda Cuesta of Cuesta Multicultural Consulting led a discussion of Cultural Competency and Library Leadership
- ▶ Native American Indian cultural visit to Pueblo Grande Museum with a private museum tour including archeological ruins. A reception and dinner followed. <http://phoenix.gov/parks/pueblo.html#museum> The City of Phoenix co-sponsored the private museum visit as an in-kind contribution.
- ▶ Topics in Library Leadership Participant Panels (3 panelists per panel, 10 minutes per panelist to share ideas)
 - Panel A discussed: ***What is the most exciting opportunity you face as a library leader today?***
Panelists: Karen Barton (Jamaica), Gerry Burger-Martindale (Canada), Robert Shupe (US)
 - Panel B discussed: ***How is technology changing the community you serve?***
Panelists: Chiku Mnubi Mchombu (Namibia), Stefka Ilieva (Bulgaria), Pilar Pacheco (Chile)

- ▶ World Café facilitated by Stephannie Gerding (see overview in pocket 6 of Participant Package) or at <http://www.theworldcafe.com/worldcafe.html>. The question we used was:
What will thinking outside the borders mean to your library and your community?
- ▶ Action Planning Partner Discussions – each AZ librarian was paired with a non US librarian a month before the program. Some began email exchanges prior to meeting. On the first evening, they were formally introduced to their partners and encouraged to begin sharing ideas knowing that they would work together on the final program activity. They each received a worksheet (see goldenrod colored sheet in pocket 6 of the Participant Package) and had 45 minutes to begin planning on:
Identify one area that you will focus on when you return to work.

Curriculum Plan Driving the Agenda:

The agenda was modified from a four days to two days. Nevertheless, the program objectives for attendees were consistent with those of the larger grant:

- ▶ Learn cross-cultural communication strategies
- ▶ Develop an understanding of librarianship and the world community
- ▶ Focus on leadership issues affecting librarians regardless of country
- ▶ Build mutually-beneficial global professional relationships

Day One provided the language and content for discussion of library leadership and multiculturalism. It included two self-assessment instruments and a mix of individual and small group activities.

Day Two began with an understanding of the need for advocacy and provided resources and techniques for conducting advocacy. The majority of the day allowed participants to share ideas, develop relationships and plan for the future through a variety of structured activities.

Program components mapped to program objectives: [agenda topics are in italics]

cross-cultural communication	librarianship and the world community	leadership issues regardless of country	global professional relationships
Pre-program information and background reading	<i>Libraries, Leaders and Leadership</i>	<i>Leadership Characteristics</i>	Email "introduction" to other participants and "partners"
<i>Multiculturalism</i>	<i>Leadership in an International World</i>	<i>Campbell Leadership Assessment</i>	Welcome pre-program meeting and dinner on Feb. 18
<i>World Café</i>	<i>Cultural Competency & Library Leadership</i>	<i>Cultural Diversity Awareness Self-Assessment</i>	<i>Action Planning Partner Discussions</i>
<i>Pueblo Grande Museum</i>	<i>Global Library Advocacy</i>	<i>Topics in Library Leadership [panels]</i>	Worldwide map
	<i>World Café</i>		

Program Expenses:

Participants were responsible for their own travel arrangements and expenses to reach Phoenix, Arizona on February 18, 2006. Lodging, meals and local transportation were provided and arranged as part of the program.

Arizona librarians selected to participate in the program were reimbursed for travel according to State Library travel reimbursement guidelines.

Scholarships for Non US Participants:

Upon successful completion of the program, non-U.S. librarian participants received a scholarship to be applied toward expenses as needed. The scholarship was paid as a check for US\$1,000. The checks were drawn on the State of Arizona account with Bank of America. A list of nearby bank branches and hours was provided. A review of participant travel plans showed that only 3 participants had to cash their checks on Feb. 20 at the conclusion of the program. Joan Clark took them directly to the bank and everything went smoothly. Arrangements were also made with the WellsFargo Bank branch at Arizona State University for folks to cash checks while attending the Transborder conference there. WellsFargo agreed to cash the checks without a fee as a courtesy to the state.

Program Budget:

See separate budget document.

"In Kind" Contributions from the Arizona State Library:

Contract specified \$3,000 "indirect costs" for administrative costs for the entire project					
In-Kind and Indirect Administrative costs are based on salary plus benefits for two people.					
A monthly per cent of time is applied to each salary					
Additional staff time was involved but not included in this total.					
Month	Time Involved	Manager		Time Involved	Admin. Support
Sept. 2006	10%	\$ 581		10%	\$ 340
Oct.	10%	\$ 581		10%	\$ 340
Nov.	20%	\$ 1,163		30%	\$ 1,019
Dec.	50%	\$ 2,907		30%	\$ 1,019
Jan. 2007	75%	\$ 4,361		75%	\$ 2,548
Feb.	75%	\$ 4,361		50%	\$ 1,699
Mar.	20%	\$ 1,163		20%	\$ 679
Sub-Total		\$ 15,117			\$ 7,644
Admin. Costs covered by grant funds					\$ (3,000)
		\$ 15,117			\$ 4,644
Total InKind Services		\$ 19,761			

Program Evaluation:

Debra Wilcox Johnson managed program evaluation for Thinking Outside the Borders. During the Nov. 2006 program in Illinois, Debra met with Joan Clark and explained evaluation plans in relation to program goals and objectives. Her final report went directly to the Illinois State Library.

Evaluation consisted of:

Pre-assessment questions sent via email to participants prior to the program. Participant responses were sent directly to Debra Johnson. [Please check with Debra regarding response rate. I believe 20 of 30 participants replied.]

1. **What are your expectations of the Thinking Outside the Borders program?**
2. **What do you hope to learn from this institute?**

Debra provided "Observation Guidelines" to be used during the program. Joan Clark assigned various program sessions to members of the Library Development Division for evaluation (see detailed LDD Staff schedule). They completed evaluation forms based on the Observation Guidelines. Completed forms were sent to Debra immediately following the program.

Debra also provided a "Leadership Assessment" form for participants to complete on the second day of the program. This form focused on the Campbell Leadership Assessment. Completed forms were sent to Debra immediately following the program.

Debra provided a post-evaluation form which Joan Clark sent to all participants via email on March 16, 2007. Replies are going directly to Debra.

Program Materials:

Each participant received a blue multi-pocket folder. Materials were arranged by pocket in the order in which they would be used.

Pocket 1 included a Participant Directory, and a pocket world map to help folks appreciate the truly global nature of the program. At the conclusion of the program the map was referenced as a reminder of their extended global professional network. Snapshot Country Profiles were also provided to compare the participants' countries.

Pockets 2-6 contained speaker slides and handouts for each session. All speaker slides were printed and collated in advance to save time during the session. Joan Clark reviewed each application and created an introductory slide for each participant. She used these slides to introduce the "library leaders" and then asked each one to share something about themselves with the group (see "Libraries, Leaders and Leadership" orange handout).

A "**Libraries, Leaders and Leadership Facebook**" was created for each participant. Several members of the Library Development Division staff worked from Sunday afternoon through Tuesday to capture photos of each participant. Then they assembled and printed the photo "facebook." Each participant received a Facebook and a program completion certificate at the closing ceremony. In addition, each person received a CD containing all the speaker slides and the photos.

Participant Partners:

International Librarians	Arizona Librarians
Rebecca Davies (Cardiff, UK)	Janet Fisher
Chansy Phuangsouketh (Lao PDR)	Scott Muir
Marta Viragos (Hungary)	Mary Hartz-Musgrave
Pilar Pacheco (Chile)	Marlene Forney
Stefka Ilieva (Bulgaria)	Dana Braccia
Priscilla Hidalgo (Costa Rica)	David Gunckel
Fior Cubero Venegas (Costa Rica)	Jeff Scott
Symphrose Ouma (Kenya)	Brian Doherty
Mavis Belasse (Jamaica)	Eileen Chalfoun
Mila Ramos (Philippines)	Tom Wilding
Gerry Burger-Martindale (Canada)	Sarah Wisdom
Susan Taiwo Odeyemi (Nigeria)	Robert Shupe
Karen Barton (Jamaica)	Nancy Ledeboer
Christine Goodair (United Kingdom)	Elizabeth Saliba
Chiku Mnubi Mchombu (Namibia)	Ralph Gabbard

Informal Feedback:**My thoughts as program coordinator:**

The program exceeded all of my expectations, and my expectations were high. I've created and managed many programs for a variety of audiences and this one had to be in the top three of a 25 year career. On top of that, it was fun!

We received many accolades throughout the entire program. Participants were excited and enthusiastic. The energy level was very, very high.

The entire group participated. There weren't any laggards or any folks who dominated discussions. Everyone seemed genuinely intent on getting as much from the program as possible. They also helped and encouraged each other.

They appreciated getting the partner names in advance and many had begun email exchanges before meeting. They also appreciated all the pre-program communication and the overall attention to detail in program organization.

No one person could have managed all the logistics during the program. Given the compressed two-day schedule, we couldn't afford to miss a beat. The support and participation of the entire Library Development Division team was invaluable. I had outlined the program minute-by-minute for my colleagues, and each one had specific assignments. Everything came together so well that minor problems (like the unexpected and unexplained big box that arrived for one of the participants) were solved without anyone noticing.

From AZ librarians:

... WOW!! Thank you for a putting together such a wonderful program - it was like the Oscars in training. My brain has been recharged :)

...the extent to which we all deal with serving diverse communities was an eye opener for me. I enjoyed hearing about the successes of librarians from other countries. Many were more advanced than I had thought. Possibly a session on how different libraries are governed would be interesting. I would like to see if any one type of governance allows faster ability to adapt and add new services.

... It was very thoughtfully organized and the information was immensely useful, and all the special efforts you and the state library staff made to make us feel welcome and comfortable were greatly appreciated. The speakers and workshop leaders were superb. I'd say it was one of the best conferences I have ever attended. Give my thanks to everyone who helped organize.

From Non US librarians:

... Colleagues, I hope you are all doing something based on our encounter. I arrived on 4th March and started work on 5th. I was told there is a workshop from 6th to 8th March on Library and Information Service Sector Strategic Planning Workshop. I have decided to use the platform to share some ideas with colleagues. We used world café method today, it was great although there were no goodies!!!!

... I will be back in Bulgaria after March 10th and I will prepare my action plan. Thank you very much for your wonderful organization during the conference. This conference has a big profit for development of librarianship in the world.

From a speaker:

... Thank you for your tremendous work and efforts at the Thinking Outside Borders Institute last week. It was clear that you are a team and this models for all of us - what interdependency should look like organizationally and globally.

I went to my first FORO conference afterward and re-met some of the participants as well as 2 of your colleagues from another dept. within the State Library. The great energy continued.

As a speaker and presenter, I felt tremendous support at your institute. Thank you for having every detail ready. It was a relief to go in and not worry about details - from the CD player to the colors of pens.

