

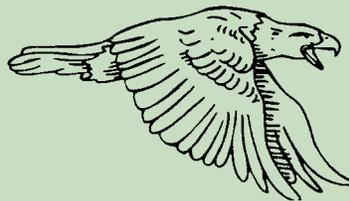
PNLA QUARTERLY

THE OFFICIAL PUBLICATION OF THE PACIFIC NORTHWEST LIBRARY ASSOCIATION

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PNLA Leadership Institute,
October 2004



pnla 2004/2005 officers and chairs

executive board

President

Jan Zauha
The Libraries
Montana State University-
Bozeman
P.O. Box 173320
Bozeman, MT 59717-3320
(406) 994-6554
FAX (406) 994-2851
alijz@montana.edu

First VP / Pres. Elect

Charlotte Glover
Ketchikan Public Library
629 Dock St.
Ketchikan, Ak 99901
907.225.0370
FAX 907.225.0153
charg@firstcitylibraries.org

Past President

Mary DeWalt
Ada Community Library
10664 W. Victory Rd.
Boise, ID 83709
208.362.0181
mdewalt@adalib.org

Second VP / Membership

Christine Sheppard
Library Association of
Alberta
80 Baker Crescent NW
Calgary, AB T2L 1R4
403.284.5818
FAX 403.282.6646
christine.sheppard@shaw.ca

Treasurer

Kay Vyhnaneck
Holland/New Library
Washington State
University
Pullman, WA 99164-5610
509.335.5517
FAX 509.335.0934
kayv@wsu.edu

Secretary

Marg Anderson
Southern Alberta Institute
of Technology (SAIT)
1301 - 16th Ave. NW
Calgary, Alberta T2M0L4
403.284.7016;
FAX 403.284.7238;
marg.anderson@sait.ca

state/provincial representatives

Alaska

Tiffany Bryner
Kettleson Memorial Library
320 Harbor Drive
Sitka, AK 99835
907.747.8708
FAX 907.747.8755
tiffany@cityofsitka.com

Alberta

Connie Forst
Northern Lights Library
System
P.O. Bag 8
Elk Point, AB
TOA 1A0
780.724.2596 X.239 (w)
780.365.2240 (h)
FAX: 780.724.2597
cforst@nlls.ab.ca

British Columbia

Diana Guinn
Chief Librarian
Port Moody Public Library
100 NewPort Drive
Port Moody, BC
V3H 3E1
604.469.4580
F 604.469.4576
Diana.
Guinn@cityofportmoody.com

Idaho

Elaine Watson
Albertsons Library
Boise State University
1910 University Drive
Boise, ID 83725-1430
208.426.1737
ewatson@boisestate.edu

Montana

Norma Glock
Middle School Librarian
415 North 3rd Street
Columbus, MT 59019
406.322.5375
P. O. Box 871
Columbus, MT 59019
nglock@mcn.net

Oregon

Carol Reich
Hillsboro Public Library
3825 NE Azalea St.,
Hillsboro, OR 97124
503.615.6505
FAX 503.615.6501
carolr@ci.hillsboro.or.us

Washington

Patience Rogge
696 Woodland Drive
Port Townsend, WA 98368
360.385.6975
rogge@macaid.com

committees

Bibliography

(inactive)
Gloria Ostrander-Dykstra
Boise State University
910 University Drive
Boise, ID 83725
208.385.3650
gostrand@boisestate.edu

Elections

Carolynn Avery
Oregon State Library
250 Winter St. NE
Salem, OR 97310
503.378.4243, ext. 269
averyc@pioneer.net

Intellectual Freedom

TBA

Nominations

Susannah Price
Boise Public Library
7715 Capitol Blvd.
Boise, ID 83702
208.384.4026
FAX 208.384.4156
sprice@cityofboise.org

Young Reader's Choice Award

Carole Monlux
Paxson Elementary School
101 Evans
Missoula, MT 59801
406.542.4055
monlux@montana.com

Webmaster

Linda Frederiksen
Access Services Librarian
Washington State Univer-
sity Vancouver
Vancouver, WA
frederik@vancouver.wsu.
edu

Electronic List Manager

Lenora Oftedah
StreamNet Library
Columbia River Inter-Tribal
Fish Commission
190-729 NE Oregon St.
Portland, OR 97232-2701
503.731.1304
FAX 503.731.1260
oftl@critfc.org

PNLA Quarterly Editor Publications

Mary K. Bolin
319 Love Library
PO Box 884100
13th & R Streets
University of Nebraska-Lincoln
Lincoln NE 68588-4100
402.472.4281
mbolin2@unl.edu

Send all Quarterly mail to:

PNLA Quarterly
Mary K. Bolin
319 Love Library
PO Box 884100
13th & R Streets
University of Nebraska-Lincoln
Lincoln NE 68588-4100

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THE OFFICIAL PUBLICATION OF THE PACIFIC NORTHWEST LIBRARY ASSOCIATION

PNLA QUARTERLY

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PNLA Quarterly Editor
Mary K. Bolin
319 Love Library
PO Box 884100
13th & R Streets
University of Nebraska-Lincoln
Lincoln NE 68588-4100
USA

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President's Message

JAN ZAUHA



MISSION

The Pacific Northwest Library Association is an organization of people who work in, with, and for libraries. Its mission is to facilitate and encourage communication, networking, and information exchange for the development and support of libraries and librarianship in the Pacific Northwest.

In October 2004 PNLA saw the execution of its greatest experiment to date: the first PNLA Leadership Institute was held October 24-29 at Dumas Bay Centre in Federal Way, Washington. The product of several years of planning, this first Institute has proven to be an excellent learning opportunity for the association, for the Institute administrators and mentors, and, not least, for the 36 librarians who attended as participants.

It is no wonder then, that the topic of this issue is leadership. It's what's on our mind on the PNLA board and, by all accounts, it's what's on the collective mind of the profession.

PNLA's interest in developing its leadership institute evolved from the board's desire to make a positive contribution to what it saw as a primary need of its member chapters. Input gathered in 2002 from PNLA's member associations indicated that development of future leaders and cultivation of bright librarians who would become further involved in professional associations at the state, regional, and national levels was a key concern. Likewise, limitations of current leadership development opportunities in the region were keenly felt in a predominantly rural area dominated by distance, with few local MLS programs available, and increasingly severe budget limitations for libraries and schools.

Thus PNLA, under the leadership of Sandy Carlson (formerly of Kitsap Regional Library, Bremerton, WA) and then of Susannah Price (Boise Public Library, Idaho), developed a vision for an intensive leadership experience that would go beyond basic skills into the realm of self-discovery and visioning, offering equal opportunity for degreed and non-degreed librarians with a wide spread of library experience (5-15 years). Research into existing leadership development programs at the time revealed that most were tied to a particular state or larger region, required an MLS, and targeted individuals with fewer years' experience in libraries. Yet across the Pacific Northwest we were witnessing non-degreed librarians increasingly called upon to play leadership roles in their associations or institutions. We also knew that in the midst of tremendous change in the library profession and in the west generally, it is not just new librarians who need to develop leadership abilities. Librarians might in their 5th or 10th or 15th year be called upon to fulfill hitherto unheard of roles or might discover new opportunities that required equally new leadership abilities.

For a predominantly female profession working in a region that has pockets of ethnic and racial diversity but is predominantly white, we knew that lack of diversity in participants might be a difficult hurdle to overcome. The diversity we chose to pursue for our first institute, then, was that of education, experience, and position. We felt that enabling a unique mixture that prioritized *professional* diversity would offer opportunities for interaction among groups who might rarely sit as equals at the same table, enabling high levels of discovery and self awareness irrespective of organizational hierarchies, levels, or lines -- something that many libraries are trying to grapple with internally, with varying degrees of success. As both a mentor for the Institute and a planner of it, I may be biased, but I feel that we achieved this goal.

The articles in this issue of *PNLA Quarterly* are primarily written by those involved with the Leadership Institute -- as participants, planners or mentors. For some, writing about their experiences at the Institute is their first act of leadership, the first step in exercising their professional voice. I think it is important for all of us to listen closely and to continue to meet the needs of our profession as they are identified, from whatever level or area they are voiced.

PNLA will do its best to continue to provide leadership development and to cultivate those who have participated in our first Institute. We have already taken steps to ensure that further opportunities are available for leaders at all levels. I am pleased to announce that the board has recently approved development and delivery of the next PNLA Leadership Institute slated for fall 2006. If you are interested in playing a part in PNLA's continuing great experiment, please contact me. ■

From the Editor

MARY K. BOLIN

This issue contains articles on the PNLA Leadership Institute that was held in Washington's Dumas Bay Center in November, 2004. There are reflections from participants, pictures from the meetings, and discussions of the Institute's Vision Statement. Thanks to everyone who contributed articles to this issue. Thanks for sharing this valuable experience with other PNLA members. ■

Call For Submissions

All contributors are required to include a short, 100-word biography and mailing address with their submissions. Each contributor receives a complimentary copy of the issue in which his/her article appears.

Submit feature articles of 1,000-6,000 words on any topic in librarianship or a related field.

We are always looking for short, 400-500 word descriptions of great ideas in libraries. If you have a new project or innovative way of delivering service that you think others might learn from, please submit it.

Spring 2005 Issue (Deadline March 1, 2005):
Summer 2005 Issue (Deadline June 1, 2005):

There are no themes for these issues. Please submit any articles or items of interest.

Please email submissions to mbolin2@unl.edu in rtf or doc format.

Submission Guidelines

Format

Please submit all documents as either a .doc or an .rtf

Font style

PNLA Quarterly publishes in the Verdana font, size 8.

Spacing and punctuation:

- Please use a single space after a period.
- Please use full double dashes (i.e., "--" not "--")
- Please place punctuation within the quotation marks.
- Please omit <http://> when quoting Web site addresses
- Please place titles within text in italics (not underlined).

- Please do not capitalize nouns such as "librarian" unless the word is included in a title.

Spelling

Web site, Internet, email, ILL; please use the spelling conventions of your country.

Citation Style

Please use whatever style you wish, as long as it is used consistently.

Additional Information

Please submit a 100-word biography and postal address with article.

UC: Knowing Our Next Leaders: A snapshot of participants in the 2004 PNLA Leadership Institute

JAN ZAUHA



Jan Zauha in the gazebo.

Jan Zauha is Reference Team Leader and Associate Professor at the Montana State University Libraries in Bozeman. She has a Master's in Literature from Clark University (Worcester, MA) and a Masters in Library Science from the University of Iowa. Highlights of her professional life include "working" as a Junior Fellow at the Library of Congress (1992), spending two years (1993-1995) learning and working as a post-MLS Research Library Resident at the University of Michigan Graduate Library, participating in the Snowbird Library Leadership Institute (1999), serving as a mentor at the PNLA Library Leadership Institute (2004), and serving as the president of PNLA (2004-2005). She can be reached at: jzauha@montana.edu

"No tool can help the leader who lacks self-knowledge." (Harris Collingwood in "Know Thyself," *Harvard Business Review*, December 2001)

Who are we? Where do we come from? Where do we want to go? Self-knowledge is a mainstay of leadership development. During the 2004 PNLA Leadership Institute, participants and mentors alike spent a great deal of time over the 5 days they were together actively engaged in intense self-awareness activities, stepping stones to greater self-knowledge. Preliminary participant survey returns gathered 6 weeks after their reentry into the "real world" indicate that 95% of respondents feel they gained in self-awareness as a result of the institute.

Likewise, PNLA (and the larger profession generally) stands to gain in self-knowledge by examining the characteristics of participants in the region's first leadership institute. One way to understand who our next leaders will be is to look at a snapshot of who came, where they came from, and why. The following information was gleaned primarily from materials submitted by successful applicants.

Basic Participant Information

The PNLA Leadership Institute Planning Committee, in conjunction with the PNLA Board, selected 36 participants out of a total of 41 initial applicants. Of the 36 who attended, 32 were female (89%) and 4 were male (11%). The average amount of library experience per attendee was 9.5 years (our requirements were no more than 15 years and no less than 5). Of the 36 attendees, 25 (69%) already play some leadership role in a library, either within a titled management position or in an untitled position that requires leadership skills. 11 (31%) were not in leadership roles at the time of their application.

The application requirements for the Institute stated that no degree of any kind was necessary for participation. The result was a mix of education levels dominated by the MLS degree or equivalent.

EDUCATION LEVEL OF PARTICIPANTS			
Degrees Possible	Number Holding	% Total	Notes
No higher ed degree	3	8.3 %	
Undergrad degree	8	22%	(includes 1 MLS in progress)
MLS degree	21	58.3%	
MLS plus other post undergrad degree	2	5.6%	
Non-MLS post undergrad degree	2	5.6%	(includes 1 MLS in progress)

The board and planning committee prioritized their selection of applicants first on geographic location. Since most chapters of PNLA had contributed seed money to the institute, we felt it was imperative to select an equitable number from each chapter. Thus, states or provinces whose applicant numbers totaled four or fewer were assured that all their applicants would have a space at the table. Of those with more applicants (Alaska, Oregon, Idaho, and Washington), other selection factors (quality of application, references, etc) came into play. Thus, each state or province in the PNLA region had at least one participant. Although urban or rural dwelling were not selection considerations, the general availability and cost of professional development opportunities for those residing in rural areas was a significant consideration for PNLA in the planning of the Institute.

cont.

GEOGRAPHIC LOCATION OF PARTICIPANTS			
State or Province	Total	Urban	Rural*
Alaska	7	2	5
Idaho	4	3	1
Montana	4	1	3
Oregon	9	8	1
Washington	10	10	0
Alberta	1	1	0
British Columbia	1	1	0
Total	36	26	10
Percent Total	100%	72%	28%

* Distinctions between urban and rural are based on 2000 census data. For purposes of this study, "rural" was defined as places with populations of less than 90,000 and geographically isolated.

Type of library, while not a selection criterion, emerged as an important factor in terms of discussion focus during the Institute and has implications for future networking options for both participants and mentors. Not surprisingly, 66% of participants came from public libraries; however all library types were represented in the participant pool.

PARTICIPANTS BY TYPE OF LIBRARY		
Library type	Number of participants	% of total
Public	24	66%
Academic	6	17%
Special	4	11%
School	2	6%

Another requirement of all applicants was that they belong either to their state or provincial library association or to PNLA. In addition to specifically indicating their membership(s) in either or both of these bodies on their applications, participants also submitted a brief professional resume. These two pieces of information reveal that the majority of our successful applicants belong to a state or provincial association, rather than a regional or national level association. Fewer belonged either currently or previously to a regional level association. Still fewer were members of any national association (SLA, PLA, ALA, CLA, etc). Active involvement in any of these categories was identified by any of a number of activities – committee work, presentations at conferences, or offices held.

RELATIONSHIP WITH LIBRARY ASSOCIATIONS		
	Hold Membership In	Are Actively Involved In
State or Provincial Library Assoc	33 (92% of total participants)	15 (42% of total participants)
Regional Library Assoc	16 (44%)	4 (11%)
National Library Assoc	13 (36%)	8 (22%)

Participant Motivation and Expectations and Outcomes

More difficult to measure or encapsulate are participants' motivations for applying, their expectations of a leadership institute, and the longer term outcomes and impacts on their professional lives. Since leadership development is not easily quantified or "calendared," it will be imperative that the developers of future PNLA institutes find ways to track professional progress and solicit meaningful feedback on the impact of the experience over time.

In the short term, immediate feedback from the participants gathered on the last day of the Institute was predominantly positive. Many comments ratified the planners' intentions. For instance, when asked, "What was your most significant learning from the institute?" some very powerful statements were made, including:

- I discovered that I must move toward personal achievement and toward a positive focus.
- Helped me to look inward at issues I've wanted to address.
- Leadership is a personal journey.
- I need to change my life.

In the future, more will be learned about our first cohort through post-institute survey input. For now, thanks to this institute PNLA certainly has a better picture of potential leaders and their needs and can further refine its focus, both through future institutes and other professional activities, to meet those needs. ■



One of the four sub-groups working on an assignment.



Dumas Bay Cultural Center.

From the Heart - My Experience at the First Annual PNLA Leadership Institute

LINDA V. MALONE



Dumas Bay Cultural Center.

Linda Malone has worked in public, academic, and special libraries since she was 15. Since receiving an MLS from Emporia State University, she has been the director of two small community libraries in Oregon and Washington, and has worked as a reference librarian in several public libraries in the Portland metro area. Currently she holds the position of Head of Reference and Adult Services at West Linn Public Library in West Linn, Oregon. She is active in the Oregon Library Association, serving on the Board of Directors of the Public Library Division (currently Vice-Chair Elect) and working on the annual conference for the last several years. She also served on the Steering Committee for Washington State's Virtual Reference Project for two years before returning to Oregon. She can be reached at: Lvmalo@aol.com.

Gathering sand dollars on the beach before breakfast...sipping wine in the "Candlelight Lounge"...jogging in solitude along a suburban road, rethinking the day.

What do these things have to do with leadership?

If you're talking about PNLA's first annual Leadership Institute in Dumas Bay, Washington, last October, the answer is, a lot.

As an Oregon participant, I arrived Sunday afternoon in bright sunshine, just a tad unsettled about what the week might hold. The retreat center, a remodeled convent, was spartan but serviceable. I had a private room with a half-bath and showers were close by.

But I soon discovered there was *no Internet access!* I panicked - how was I going to check my email? Make sure all the desk hours at the library were covered? Follow through on my duties as part of the annual OLA conference team? Keep current with the ups and downs of library personnel in the metro area? Talk to my family?

The answer was - I wasn't. And that's a critical element of the success of the Institute. It is a "retreat" - from work, from professional duties, from family needs, from the world at large. The deliberate removal of these outside issues sets the stage for the work to be done during the week, a week in which I was challenged to know myself and to develop an understanding of what a leader really looks like.

And while I first saw this as a hardship, I gradually began to appreciate what it actually was - a privilege, a brief interlude of pure bliss in which I was free of the nagging everyday elements of my work and able to focus on the bigger, meatier picture. Why was I there? What did I hope to gain? Where did I see myself in the future? What kind of a leader might I be and how could I become a better one?

The questions didn't exactly come into focus the first night, when the participants, mentors, and leaders gathered for dinner and an orientation. I was still a bit unsure about what would be expected of me. Would I be able to break down self-imposed barriers and allow myself to work on answering the tough questions? How would I fit into the group? Indeed, how could this disparate collection of individuals from special, public, and academic libraries around the Pacific Northwest begin to coalesce into sub-groups, finding and developing common strengths and learning from our differences?

Without revealing too much about the specifics of the experience, I can honestly say I found myself gradually pulled into a different plane of experience, one in which the exercises and participant interactions began to create an atmosphere of trust and openness in which I couldn't help but explore the questions. I, who have never willingly risen from bed without a cup of coffee in my hand, found myself waking early, alert and eager to get downstairs to breakfast and the beginning of another day of exploration, triumphs, disappointments, occasional cleansing tears, and the real joy of discovery. Often I would start that day with a walk on the beach at low tide, gathering sand dollars and my thoughts about how I wanted to grow that day. And after a long and intense day of discoveries and challenges, I couldn't wait to tie on my running shoes and hit the pavement, allowing the events and emotions of the day to wash over me and gradually settle into their proper place, so that I could return, eager for more, the next day.

What was the most important thing I learned in my six days? To be open, to refrain from making assumptions about others and myself, but instead to listen actively and learn, not only from others, but also from myself, every day. And to use this daily listening and learning to build the character of a leader, at whatever level I find myself: strong, courageous, and fair.

Have I done this consistently since I returned? No, I can't say I have. The same daily stresses and issues that I blissfully left behind while I was there continue to bubble to the surface and demand most of my daily attention. But I can say I *think about it* and try to integrate it into some small part of my work and personal life every day. And I can feel that small daily exercise, which has become a habit and continues to grow, slowly but surely forming the core of my professional life.

The "Candlelight Lounge"? That one you'll have to discover for yourself, but here's a hint - it's upstairs, towards the back. ■

Got Vision? First Ever PNLA Leadership Institute Informs and Inspires

DARREN J. NELSON

The “vision thing,” as pundits once described it, is an elusive concept for many people, as is the term “leadership” itself. If I formulate leadership as “vision” plus “action,” it is clear that vision is the more difficult part of the expression to understand usefully. Until now, I have thought of vision as a quality that organizations or individuals just have, much like “morale” or “charisma.” They are all hazy notions, suitable for compliments (if they are present) or criticisms (if not), but not something you can cultivate in yourself or train in others. The first PNLA Leadership Institute, if nothing else, has convinced me that not only is vision something we can strive for, achieve, and inspire in others, it is imperative we do so. Vision is the focus that can channel our energy purposefully in challenging times, assuming we together come up with the right vision and have the commitment to stick to it. If we get the vision right and remain dedicated to the right vision, it will produce fruitful results for our careers, our organizations, our profession, and most importantly the communities of users we serve. Get it wrong, and we sink into frustrated irrelevance, with society the poorer for it.

So what is it about the Institute that led me to such a clear conclusion? I cannot point to one thing in particular. Being sequestered by Puget Sound for a full week in a facility once housing a convent is bound to lead to some reflection, but really all aspects of the experience reinforced in me the notion that positive vision is worth taking bold risks as well as thought and effort to attain. For those who paid their own way to attend the Institute (and hats off to them!), the risk and sacrifice for the payoff were obvious. For those of us lucky enough to have full institutional support, the expectation that we could bring back something real to incorporate in our work was palpably present if not explicit. Thanks to excellent facilitators, organizers, colleague interactions, and information, I have been able to make positive changes in how I operate at work already, and I hope to convince everyone around me that my attendance was a worthwhile investment.

I will return soon to some of the ways I have been implementing what I learned at the Institute, but first I want to reproduce the First PNLA Leadership Vision Statement and use it as a centerpiece for my central point about vision. Here it is:

We, the participants of the first PNLA Leadership Institute commit ourselves to motivate members of the library community into positive leadership roles.

We tirelessly advocate for intellectual freedom, informational privacy, and equitable access to information because they are the foundation of a free and democratic society.

We reach out to our communities and reflect their vibrant diversity in our staff, collections, and services.

We position the library as the focal point for cultural activity and community gatherings.

We optimize customer convenience by improving the ease and speed of access to our rich collections while maximizing the value of every dollar.

We pioneer innovative and intuitively useful technology that fulfills our users’ expectations.

We shape a new identity for Pacific Northwest libraries which resonates across the library community, discovering our collective voice in the pursuit of our individual passions.

Ah, so this is the vision, the one concrete product of our discussion and labor for the week, but how will it help us become better leaders?



Dumas Bay Cultural Center.

cont.

Darren Nelson has managed the Bethel Branch of Eugene (Oregon) Public Library since 2002. Before that, he worked for four years in public library branches in both Kansas City, KS and Kansas City, MO. He served as the President of the Heartland Chapter of REFORMA (the Association to Promote Library Services to Latinos and the Spanish-speaking) from July 2000 to July 2002. He has since been active in diversity and community development efforts for the City of Eugene’s Library, Recreation, and Cultural Services Department. He received his MLS from the University of Iowa in December, 1998. He can be reached at: darren.j.nelson@ci.eugene.or.us

Got Vision? First Ever PNLA Leadership Institute Informs and Inspires - cont.

First, the statement represents a profoundly collective process. It is a refined and focused amalgamation of literally hundreds of post-its wallpapering a few windows. We produced the post-its as thirty-six individuals, after taking a shot at individually written vision statements about an ideal library. Then, in our "learning groups" of nine, we read these aloud while the others in our group scribbled key phrases and ideas that struck them as powerful or apt. After a crowded exercise of stick-up and re-group, we made a mosaic of these ideas and appointed a writing committee of four participants to turn them into a solid vision statement. I had the pleasure of serving on the writing team, so I can tell you it seemed a daunting task for a couple of days. Of course, we are used to writing singly as I am now, and so I found the assignment frustrating at first. I am not sure we would have ever agreed on anything this clear and unified but for the editing discipline of one of our facilitators, Becky Schreiber, who was great as a sounding board. It was like chiseling an ornate snowflake from the center of an iceberg. The reception of the statement on the last day was a standing ovation, not so much because of the statement itself, but because in spite of its brevity, each of us could see our hand in it. We could appreciate first-hand how a broadly inclusive process of visioning results naturally in an enthusiastic buy-in. Since leadership is about influencing others to follow a vision, the lesson for leadership was clear: a collectively written vision statement



Quiet time.

is a terrific tool for bringing positive, focused, forward-looking energy to an organization that might otherwise flounder in day-to-day priorities and disparate individual agendas.

Another way the vision statement relates to leadership is through the themes it touches on. The statement's themes are closely tied to the factors we identified in an environmental scan of the profession. Some of the challenges in particular are hardly new, such as fiscal pressures, unequal access to information, and rapid technological change with all its attendant promise and peril. Others seemed newly urgent: immigration leading to increasingly diverse communities of users; new threats to intellectual freedom and confidential use of information, such as the infamous section 215 of the Patriot Act; an increasingly concentrated ownership and homogenization of the publishing industry; multi-front attacks on the public sector and social safety net; pressures to outsource and make decisions about outsourcing; among others. What we also discovered through discussion, however, is a list of opportunities as well as problems: the generally benign image of the library when taken out of certain charged political contexts, the increasing usage and potential of public libraries in particular as community centers and economic assets, and the potential of partnerships with businesses, education and other groups to implement new programs and technology to further our libraries' missions. Not only in the environmental

scan and SWOT analysis (an analysis describing strengths, weaknesses, opportunities and threats in the profession's response to its environment) did these themes come up, but throughout our week in private discussions, in our shared examples from work, and of course in the writing of the vision statement. A good vision is not only a collaborative expression of values, but a roadmap through the frequently muddled terrain surrounding us as we try to move forward. This scan of factors not only brings realism but a concrete emphasis to any vision statement, resulting in a focusing document that inspires precisely because it identifies clear paths of action. Vision of that kind is anything but an empty litany of vague platitudes.

So a great vision statement rose up from the input of all involved, cognizant of real issues and commanding the support of all those who helped author it. How do we know something

like this will not become another locked-up trophy, just another neat idea or proposal like so many others forgotten in the hangover of returning to work from a great conference or workshop? I know we have all had this experience. For me, the key is remembering that the week of the Institute, energizing as it was, was a start of a process, not an end in itself. As our facilitators emphasized strongly, the Institute was not about a positive group experience. If it happened, we could consider it a bonus, but the point was to think about our leadership potential and start developing it.

As if to hit the point home, my own learning group got a wake-up call in the form of frank feedback from an important mentor half-way through the Institute. I will protect this individual's anonymity, but truly her comments were tough: we had not to that point shown "any" leadership in our activities and instead were bogged down in process and indecision because we were more concerned with being "too nice" to each other than in achievement. I had to skip a lunch recovering from that one, but the effect of straightforward feedback was productive. It also underscored for me the importance of honest feedback, period, in sustaining an effort and a needed impetus. In my "re-entry" into my workplace, this has been one of my most valued tools for keeping the vision alive and turning it into action: feedback, feedback, and more feedback. I am practicing giving and taking clear and specific feedback, especially with my workgroup team (I manage a branch of Eugene Public Library) but also with myself.

This is a good time to come back, then, to what I have experienced since completing the Institute. Immediately on returning, I used the technique of ground rules to establish protocols of communication and decision making within my own workgroup. This has helped particularly with staying on the agenda, which is our key ground rule. As I suspect with many library workgroups, our issue is focus and completion of tasks rather than respectful communication, which comes

Got Vision? First Ever PNLA Leadership Institute Informs and Inspires - cont.

naturally to us. The focused agenda leads directly to action items and timelines for completion. This was always the intent before, but the ground rules have somehow made it happen more reliably. This has worked so well I am eager to adopt similar rules for a city departmental task team I chair working on diversity and marketing issues, as well as a task team working on developing new fundraising processes for a local community celebration in which the library participates as a primary sponsor. Before the Institute, I had thought of ground rules as a means of moderating power struggles and aggressive communication, but I am pleased to see their applicability in my own situation following some practice at the Institute. The rules seem like a small structural adjustment, but they provide a means to gather input, ideas, passions, opinions, and information from all concerned staff in a way that their being heard is assured. This helps with the both the development and the buy-in of a shared vision for the organization as much as for the work team.

A second task for my re-entry into work was establishing a regular venue of communication with my supervisor to make sure my workgroup's issues were coming before him and that I was receiving needed feedback from him. For me the internal message is "Stay focused, solicit feedback, and get on the agenda to be more effective." To that end, my supervisor and I have been using a half-hour a week for face-to-face communication, and after a few weeks I perceive excellent results. Key issues and projects important to

my staff, such as moving the Young Adult area for better service, having a greater voice in circulation policy making, and participating in imagining ways to implement a self-service model at the branch more effectively (as has already been happening at our Downtown facility) are at the table now in a way they were not before. This is taking to heart the notion of using the chain of command effectively, which has been one of my personal tasks to work on. Leading collaboratively in a large but highly integrated organization, in my case a three-location public library within a city structure, requires a higher skill level in collaboration than I as a branch manager had been accustomed to previously. As someone who experienced a lot of success early in my career with a high degree of autonomy, consistently contributing to and following a larger vision not just of my own making has been a challenge. The Institute's specific tools for and discussion of organizational change and responses, leadership styles, and group communication for that reason filled a tremendous need and greatly exceeded my expectations.

As many in my library, including the Principal Librarians and Director, are also attending leadership trainings and acad-

emies, it will be interesting to compare notes on the models specifically used by the Institute to promote understanding of different leadership styles and responses to change. The key models we looked at were the enneagram and the MBTI (Meyers-Briggs Type Indicators). The first is a model for self-examination and growth, to expose us to some of the constructive and destructive aspects of our style. In my own case, knowing that I test as a style 9 (facilitator/peacemaker), gave me a recommended list of behaviors to avoid (appearing agreeable while secretly going in my own direction) and a recommended direction of growth (concentration on personal achievement rather than minimizing conflict with others). The MBTI presents four dichotomous continua of personality, namely extravert/introvert, intuitive/sensing, feeling/thinking, and judging/perceiving. This model is helpful as an analysis of responses on the part of employees to organizational change. I will not go into detail, but a particularly useful



Working on a small group assignment.

insight for me was understanding that my own introverted and intuitive style leads me to relish the idea(s) of change but be less patient with or attentive to the operational details and nitty-gritty of implementation. I need, therefore, to orient toward the needed testing, devil's advocacy, and step-by-step processes to make my own enthusiastic adoption of our organization's vision a successful reality, as well as appreciate those whose natural preference is for the aspects of change in

which I am relatively lacking. Just being conscious of this difference is an important first step.

The changes I have made in the month since returning from the Institute are baby steps, perhaps, but they are getting positive reinforcement in that I can see some real progress, which gives me a greater degree of confidence and energy. The next step for me will be greater professional involvement toward an issue, and there are many to choose from. Ann Symons, during an evening "from the heart" mentoring presentation at the Institute, talked at some length about discovering our "voice," the informed and active passion that we adopt in the face of an issue we care deeply about. In her own case, intellectual freedom and developing leadership in the profession have been key causes. Other big issues I could identify come, again, right from our vision statement. Recruiting a staff as diverse as our communities, engaging new technology so that it truly meets the needs of users, and promoting the library as a central economic asset are appealing candidates for a life's work right now. Whatever I choose to pursue, I will look squarely at the vision as the guiding star to real success. ■

The First Ever PNLA Leadership Institute – Musings from a Mentor

ALISON NUSSBAUMER



Ann, Becky and Pilar are shown during a daily mentor meeting.

A first-career choice librarian who delights in her profession, Alison has been a librarian for 18 years and is currently the University Librarian at the University of Northern British Columbia. Alison received her MLS from the University of Alberta. She has always been committed to learning and investing in herself and others through formal and informal education/networking/relationships. Her commitment to developing and applying her leadership skills began when she was a participant in the Northern Exposure to Leadership Institute. Alison has held executive and leadership roles in three provincial library associations and is currently the Past President of BCLA. Favorite quote, "Even in my blunders I overachieve." (Cathy Guisewite, creator of comic strip "Cathy") Favorite food group: chocolate. Drug of choice: caffeine. She can be reached at: Alison@unbc.ca

What do 36 aspiring library leaders do when they don't have access to the Internet, their Blackberrys and Palms are sitting idle in a dead zone, their cell phones have to be turned off and they can't get off the island??? They learn to lead.

The first ever Pacific Northwest Library Association Leadership Institute took place in Federal Way, WA from October 24-29, 2004. The mélange consisted of 36 participants, 8 mentors, two fearless leaders (Becky Schrieber and John Shannon), "Mom Vyhnanek" and coordinator and long time PNLA executive, Susannah Price. The members of this industrious group came from 5 states and two provinces. The Institute's mandate was to provide leadership development training to all library staff regardless of position, title or responsibilities so we had a mix of participants that included public, school, academic and special librarians, circulation supervisors, MBA graduates, library technicians and others. The participants' library experience ranged between 5-15 years. Our mentors were as diverse as our mentees bringing a wide variety of experience, demographic background (a nice way of saying "age") and an international cachet (that would be the two Canadians)

What does it take to design, develop and host a leadership institute? It begins with a vision. A vision gives us a clear and compelling picture of the desired future. (PNLA Leadership Institute, 2004) It draws us together and enables us to focus our energy. A vision moves us forward in the same direction. A vision is not a new concept, and it is not a fad. There must be billions of quotes about vision, but the one that I know and refer to is from the Bible, "Where there is no vision, the people perish". (Proverbs 29:18, KJV.)

In early 2002 several two key individuals, Anne VanSickle and Sandy Carlson began to encourage the development of a PNLA Leadership Institute. (PNLA Leadership Institute Binder, 2004) Their vision was that leadership skills can be developed, and that people can lead from any position within the organization. The formulation of the vision led to defining the goal. The goal was to provide a unique leadership training and development experience for anyone working in libraries. Articulating the goals helped to define the target market. The target market became people with 5-15 years of library experience coming from the 5 states and two provinces that make up PNLA.

The people may perish without a vision but the vision will perish if there are not people willing to work behind it to provide it with form and substance. This challenge is not for the faint of heart. It took a tremendous amount of work and commitment from numerous individuals and a succession of PNLA executives to flesh out the vision. Do you suppose that there were periods of conflict? How was continuity ensured during changes in board and committee membership? Was it scary or intimidating seeking corporate sponsorship? At what point did PNLA decide they were at the point of no return? The leaders who created this institute had to deal with conflict, transition, change, and risk. They had to make decisions. Their vision became actualized through the articulation of goals, objectives and strategies.

These objectives and strategies provided the framework for the Institute. Our fearless leaders, Becky and John, took on the task of providing the content, managing our expectations, and marshalling our energy. Becky and John are no strangers to "libraryland" and were the leaders of the Snowbird Leadership Institute (which ran for 10 years) and continue to lead the Aurora Leadership Institute for all of those librarians down-under!

Finally, to complete the transformation from vision to reality and to implement the objectives and strategies, there needs to be action. It took the action of stepping forward by the participants, mentors and leaders to complete the cycle.

The "stepping forward" occurred at both the group and the individual level. As a mentor my role was divided between the "nots" and the "dos". I had to concentrate on not leading, not taking over, and not fixing. I was able to provide feedback, having fun, encourage others, laugh, and share some of my stories. What I also experienced was tremendous learning.

What is the vision? It is a firm belief and that there are latent and lurking library leaders in the Pacific Northwest just waiting to be unleashed. That's quite a vision.

And that is just what happened. ■

The Leadership Institute Vision Statement

JASON OPENO

Effective long-term planning requires the establishment of a mission or a vision statement. Even though we all possess an answer in our hearts for why we are librarians, it is a powerful exercise to articulate the purpose for our existence. This article provides insight into the process and discussions behind the first Pacific Northwest Library Association Leadership Institute's Vision Statement and outlines its relevance to members of the library community who were not present at Dumas Bay.

There are few opportunities during the working week to discuss with colleagues the many crises facing the library profession and how to tackle them. There is also not much time to examine the concept of "leadership" and what it means to be a library leader. But this was the central focus for 36 emerging library professionals at PNLA's first Leadership Institute at Dumas Bay, Washington on October 24-29, and the only creative document to come out of this experience is the Vision Statement.

We are not supposed to provide in-depth detail about the curriculum of the Leadership Institute in order to protect the experience for individuals who may yet participate in a similar activity. The "not knowing what to expect" is a critical element of the atmosphere. It is therefore not possible to provide anything but a brief and vague description of the group process behind the construction of this document, but this group process was essential and the Vision Statement is a document of collective creativity.

The Vision Statement process began with each participant envisioning their ideal library. The second step included each of the smaller groups extracting their favorite phrases from each individual vision statement. Then, collectively, as a teeming, chaotic mass, the entire group organized these favorite phrases into central, recurring themes. A small group was then elected from the whole to draft the vision statement from these core themes, and I was fortunate enough to be on the Vision Statement Committee of the first PNLA Leadership Institute, along with Darren Nelson, Pam North, Diane Rice, and Becky Schreiber.

In crafting the vision statement, the committee faced several burdens. We needed to account for different library environments and construct a statement universal enough to be inclusive but not so generic as to become meaningless. Further, we sought to produce a document that would inspire local library systems, library associations, and other librarians to implement and participate in Leadership Institutes similar to the one in which we participated.

The adopted vision statement reads:

- We, the participants of the first Pacific Northwest Library Association Leadership Institute commit ourselves to motivate members of the library community into positive leadership roles.
- We tirelessly advocate for intellectual freedom, informational privacy and equitable access to information because they are the foundation of a free and democratic society.
- We reach out to our communities and reflect their vibrant diversity in our staff, collections and services.
- We position the library as the focal point for cultural activity and community gatherings.
- We optimize customer convenience by improving the ease and speed of access to our rich collections while maximizing the value of every dollar.
- We pioneer innovative and intuitively useful technology that fulfills our users' expectations.
- We shape a new identity for Pacific Northwest libraries which resonates across the library community—discovering our collective voice in the pursuit of our individual passions.



Becky Schreiber and Ann Symons during one of the breaks.

cont.

Jason Openo is a graduate of Albion College and of the University of Washington Master of Library and Information Science program. He entered the library profession after working for five years with homeless individuals and families in Seattle, which included launching a \$3.5 million mobile service delivery program for homeless families transitioning to permanent housing. Jason is now the Outreach Services Manager and Adult Programming Coordinator at the Salem (OR) Public Library, where he leads a branch library, an expanding bookmobile, homebound services, and coordinates cultural programming. A devoted seeker of bizarre news, he lives in Salem with his dog Moose. He can be reached at: jopeno@cityofsalem.net

The Leadership Institute Vision Statement - cont.

Crafting the Vision Statement was a difficult task, but the more challenging task for each of us is manifesting this document in our libraries through the development of programs to address changing needs and inventing novel solutions to problems that have plagued the profession throughout time.

1. Positive Leadership Roles: By 2010, some 80,000 *librarians*—including many library leaders—will reach the age of 65 and leave the profession.¹ This exodus demands that succession planning be incorporated into our efforts in order to prepare the profession for this massive loss of leadership and experience. Programs like the Leadership Institute are a part of the answer for existing library professionals. Developing more involved mentoring relationships on a regional basis would also assist in addressing the emerging need to develop new leaders. Also, it is necessary to recruit and train librarians in the next several years. “The federal Institute of Museum and Library Services (IMLS) has awarded \$14,790,543 to library schools and library service organizations to recruit and educate new *librarians* in the face of anticipated *shortages*.”² PNLA, in tandem with local state library associations and library systems, can begin its own regional recruitment and education efforts.



Lunchbreak detritus.

2. Tireless Advocacy: The current era of anxiety and occasional hysteria requires that librarians mobilize to ensure the basic right of intellectual freedom. As Stephen Abram, Canadian Library Association President, said in his inaugural address: “Threats to libraries and information rights are direct threats to Canadian values, democracy and our way of life.”³ Advocacy may not be comfortable because it throws us into open conflict with other community members, but we need to respond vigorously in unison to the direct attacks upon intellectual freedom, libraries, and informational privacy. We must be as tireless as our adversaries, and more persuasive.

3. Diversity: “The lack of ethnic *diversity* in the ranks of *librarians* is a pressing problem for the whole profession.”⁴ The profession is overwhelmingly white, female, and middle class. We are in danger of not looking like our constituents, not understanding their cultures, and therefore not being relevant to their lives. In 1990, Carol Hole wrote, “we treat [the feminization of libraries] as a dirty little secret because our funding depends on the myth that the library serves the whole community.”⁵ This is important because our lack of professional diversity sets the stage for our obsolescence. Therefore, we need to follow the example of innovative recruitment strategies like the program being carried out at Louisiana State University. Louisiana State University is making a concerted effort to recruit minorities, and the tuition waiver for library school is one way to achieve this.⁶ Another possibility is awarding curriculum credit in library school for foreign languages spoken by prevalent populations in our communities. The commitment to diversity needs action-based programs, and immediate action requires money. We must

also be attentive to long-term earning prospects for people of color who do go graduate school. Will we be able to offer salaries that make spending the money for a library degree worth it when they could become an MBA instead? And how will we support these pioneers once they find themselves in exceedingly white organizations?

4. Library As Place: There was much discussion about the library as the “heart” of the community, but what does that mean? In *The Chronicle of Higher Education* in 2001, Scott Carlson wrote an article entitled “The Deserted Library” documenting years of declining traditional usage statistics. In a follow-up article in *Library Journal* on April 15, 2003, those libraries that took steps to make their libraries the center of student life saw an increase in gate count and circulation. “The basic idea, says Loyola’s [Mary Lee] Sweat (Dean of Libraries at Loyola), is to offer students ‘one-stop shopping.’ At Loyola’s Monroe Library, not only do students get help with finding resources and doing research, but librarians also offer a range of instructional services. ‘If you want students to use your library,’ Sweat explains, ‘you want to offer them everything they need.’”⁷ In academic and community settings, we will only improve our market

share by continually asking ourselves, “How can we better offer our patrons ‘everything they need’ in the form of materials, meeting room space, and social space? What are we not doing to make ourselves crucial to our community?”

5. Maximizing Value: The era of describing library services as “free” has ended. This undermines our value and misrepresents reality. Instead of “free,” we must articulate our value to our communities and acknowledge the sources of financial support without which we would not exist. The best example of the new paradigm of value-based communication is a study done by the Florida State Library conducted between January and September 2000. The study was undertaken “to identify and describe the economic impacts and benefits of Florida public libraries.” It concludes forcefully, “This study clearly reveals that patrons believe libraries contribute to their financial well being, provide economic benefits to local businesses, and support community development.”⁸ This is the language spoken by those with the power of the purse. Messages that speak to economic impact and benefit will be key to future, robust funding of libraries.

6. Pioneering Innovative Technologies: Too often, we respond to changes in technology, or adopt software lacking functionality to meet patron needs. Instead, we should be dictating technological development in order to give patrons the most convenient, usable technologies. Our competition has arrived in the form of Google, Netflix, Napster/Kazaa-like file-sharing services, and Amazon. They have dramatically

The Leadership Institute Vision Statement - cont.

changed our users' expectations for information and service delivery. How do we secure our niche in an environment where more and more businesses offer free or very cheap services overlapping with our traditional domain? The question becomes even more pressing when we consider a younger generation that is rapidly moving away from print reading to receiving RSS feeds on their PDAs.

7. Individual Passions: The greatest thing about the Leadership Institute was the opportunity to be surrounded by passionate librarians, fervent about a unique body of interests and goals. We must fuel, support, and capitalize on these individual passions. We are a wonderful group of service-oriented, mission driven people who cherish the communal good as a noble ideal. When united in that diversity, we are a social force that commands attention and must be reckoned with.

My professional life will forever refer to this intense week of personal investigation and skills development. All of my efforts from this point forward will be efforts to fulfill the spirit of this Vision Statement in the libraries and library associations I work in. And I take great comfort in knowing there are 35 other people out there who feel exactly the same way. I look

forward to hearing about the accomplishments of my fellow Leadership Institute alumni.

Notes

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4. Gorman, Michael, What Ails Library Education? *Journal of Academic Librarianship*; Mar2004, Vol. 30 Issue 2, p99, 3p.
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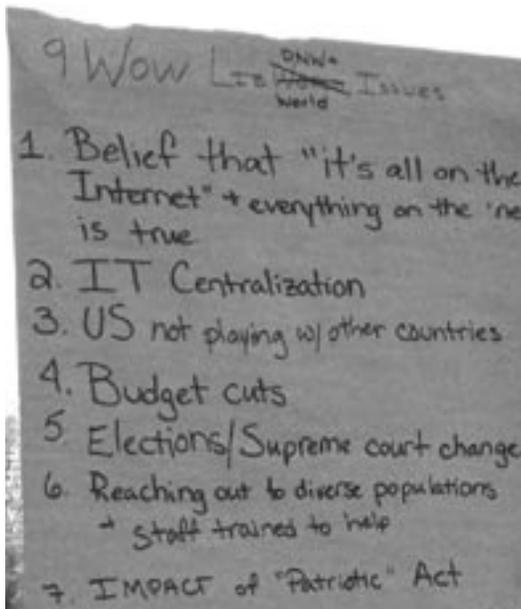


Strengths, weaknesses, opportunities and threats exercise.



Reflections on the PNLA Leadership Institute

MONICA SANDS



The brainstorming is one group's view of the current state of librarianship.

The PNLA Leadership Institute was a much-needed breath of fresh air for me. I spent time with many amazing people from around the Pacific Northwest and all different kinds of libraries including public, academic, school, and special libraries, all with the same passion for libraries and many of the same concerns as me. These people shared their wisdom freely and inspired me to become more involved in the library community.

The most important aspect of this experience was the opportunity to learn about my leadership style and personality traits. For instance, even though my husband has told me a thousand times that I have a particular annoying habit, I never really believed him. I certainly never admitted it! As I discovered at the institute, this annoying habit is one of the negative characteristics of my leadership style. My husband was right after all! Fortunately, now that I recognize this about myself, I can change it.

In addition to choosing activities to teach us about ourselves, John Shannon and Becky Schreiber, the institute leaders, selected activities that taught us how to effectively work together despite our different leadership styles and personality traits. The more we know about ourselves and how other people function and make decisions, the better we will be able to communicate with each other and work together to accomplish our goals. Thankfully, John and Becky presented the information in ways that prompted introspection while holding my interest. Honestly, I was not bored for a second.

As a quote fanatic, I was delighted to find a goody bag *and* a quote waiting for me in my room. I was even more impressed to find out that there was a different quote waiting for each of us. I was definitely in the right place! Somebody else at the institute must love quotes as much as I do. I was continually delighted as the week progressed and John and Becky sprinkled positive quotes and snappy phrases throughout their presentations. It was another way the leaders helped recharge my batteries, and it had the side effect of inspiring me to retire the quote I had been using as my email signature for far too long.

By attending the institute, I also came to realize that although I see myself as a positive person, I had begun to forget the power of positive thinking. Being around negative people or in a stagnant environment can take its toll, and I now see that it has. While it has not scarred me for life, I do need to change my thinking and get back to the person I was before. Quotations are very powerful tool for changing our thinking and will be my first defense against negative thinking.

At times during the week I felt very frustrated about my current work situation and the perception of paraprofessionals within my organization. Having worked for over a decade as a paraprofessional, I can still say I love my job and I know that the work of all library staff is valuable. Even though I value the work of paraprofessionals, it was only until recently that I began to realize how little my library system seems to value the work of paraprofessional staff. This negative attitude towards paraprofessionals has seeped into my thinking and has changed how I feel about myself. While I love my job, I am not so enamored with the organization for which I work, something that became clear to me at the institute as I spoke with other attendees. It does not have to be this way.

The institute helped me pinpoint the negative thoughts and attitudes I hold and taught me techniques to change my thinking. For instance, although I recently completed my MLIS degree, I have hesitated calling myself a librarian because I do not hold an actual librarian position yet. I find myself saying, "Oh, I'm only a paraprofessional," or "I'm just a clerk." This institute helped me realize how ridiculous this was. This negative talk is a symptom of the damage my organization's culture has inflicted upon me and other paraprofessionals. I decided at the institute that it is okay for me to say, "I am a librarian" because I am a librarian regardless of my position within the system! As crazy as it sounds, I still look around when I say it to see if anyone is going to say, "No, you're not. You're just a paraprofessional." In fact, "I am a librarian" has become one of my affirmations, a tool I was reintroduced to at the institute. When I shared

cont.

Monica Sands recently graduated from the University of Washington Information School with her MLIS where she was a member of the inaugural distance learning cohort. She has worked for a county library system in Washington state for over 12 years as both a paraprofessional and, currently, as a youth services librarian. She can be reached at: monicas@pcl.lib.wa.us.

my affirmation with my group at the leadership institute, it was met with applause. What a wonderful welcome into the profession! Thanks, group.

Thankfully, the organizers of the institute were wise when it came to handling the mix of paraprofessionals and professionals. All institute participants were welcomed equally. There was no indication on people's nametags or on the list of participants what position anyone held in the "real world." We were all there for a common purpose and we all learned from each other. Not knowing who did what in the library world created a very open and sharing atmosphere.

The straight from the heart sessions in which mentors spoke to the group also were inspiring and led me to reconsider my direction both professionally and personally. While we did get to interact with our mentors, I would have liked to hear more from them, as I believe they could have provided very insightful feedback. I understand why the institute leaders decided to keep the mentors quiet much of the time. As participants and leaders, we need to learn how to and feel

comfortable giving feedback to others, often a very tough thing to do tactfully and so that your point is made effectively. I tend to water things down for people so as not to seem too harsh or hurt someone's feelings. This is dangerous because the person may write off what I am saying because I am not saying it strongly enough. The institute was a chance for me to practice giving honest feedback to others without watering down my message.

Looking back on my week at the PNLA Leadership Institute, I am still surprised by how much I learned about myself. The break away from the "same-old, same-old" with a group of library-loving people has revived my passion. My passion for libraries has always been there, but I think it has been hibernating! For me, the PNLA Leadership was a journey of self-discovery sprinkled liberally with positive thoughts, practical advice, and words of wisdom. Thank you to the PNLA Board who had a vision and saw it through, to my library system and my state library for funding my attendance, and to all of the institute attendees for helping make it a fantastic week. ■



Strengths, weaknesses, opportunities and threats exercise.

The Stories We Share

Make plans to share your stories with your colleagues at the 2005 PNLA Conference, "The Stories We Share," August 3-6 in lovely Sitka, Alaska. The program planning is well underway, with a focus on archives, collection development, storytelling, and Alaskan authors. Key-note speaker Rick Bragg, formerly of the New York Times, and author of the bestselling books "All Over But the Shoutin'" and "Ava's Man" is a Pulitzer Prize winner and one of the finest feature writers and storytellers in the country.

Featured authors Dana Stabenow and Nick Jans know Alaska from the inside out and will share their insights with you. If you like mysteries, check out Dana's debut "A Cold Day for Murder" which won the Edgar Award or the several dozen she has written since. Nick is famous for his writing from Bush Alaska, his essays for USA TODAY, and his several regional bestsellers. Look for a new book from him out in May of 2005 from Dutton about Timothy Treadwell and the lure of bears. Both writers travel frequently and contribute regularly to "Alaska Magazine."

With spruce forests and historic buildings reaching down to an ocean of small islands, Sitka is considered Alaska's most beautiful waterfront town. Here in Southeast Alaska it is affectionately called "The Paris of the North" and it is a favorite destination for weekend trips or conferences. The PNLA conference will be held at Harrigan Centennial Hall and the Westmark Shee Atika. There will be a range of lodging options available as well. Local hotels, bed and breakfasts, and inexpensive dorm rooms at Sheldon Jackson College will meet any budget.

Getting to Sitka is easy. Alaska Airlines offers daily jet service from Seattle. For flight reservations call 1-800-426-0333 and be sure to give them our conference code CMR7486 to get a 10% discount in addition to the lowest published fare. The Alaska Marine Highway System is another possibility if you have more time. The ferry travels from Bellingham, WA to Sitka in just over two days or there are fast ferry options from Juneau. Check out schedules at www.state.ak.us/ferry.

With its unique combination of Tlingit, Russian, and Alaskan cultures makes Sitka a diverse and fascinating community. We hope you will say the same about the 2005 PNLA conference when you see the program in your mailbox this winter. In the meantime, if you have a program proposal, question, or comment, please e-mail conference coordinator Charlotte Glover at charg@firstcitylibraries.org or call her at 907-225-0370. ■

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- () \$30,000 to \$39,999 \$60.00
- () \$40,000 to \$49,999 \$70.00
- () \$50,000 to \$59,999 \$80.00
- () \$60,000 and over ... \$90.00

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(in the currency of country of residence)

I would be willing to serve on:
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