

A large flock of birds flying in a V-shape against a sunset sky. The birds are dark silhouettes, and the sky transitions from a pale blue at the top to a warm orange and yellow at the bottom. The flock is positioned on the left side of the frame, with its tail pointing towards the bottom right.

Collaboration and Convergence

Boundary-spanning
leadership in libraries,
archives, and museums

Katherine Skinner, PhD
IMLS, February 23, 2017



Presentation Roadmap

- Educopia's mission and methods
- LAM-learning projects 2013-2017
 - Five projects and their intersection points
 - General application of methods
- Deeper dives
 - Coalition to Advance Learning
 - Mapping the Landscapes
 - Nexus and Nexus LAB
- Next steps

Presentation Roadmap

- **Educopia's mission and methods**



Educopia's mission

The Educopia Institute advances cultural, scientific, and scholarly institutions by catalyzing networks and collaborative communities to leverage and advance expertise, infrastructure, and information.



EDUOOPIA INSTITUTE



MPH



Systems tend toward stasis

Critical transitions are rare and recognizable

Human networks move innovations from fringe to center

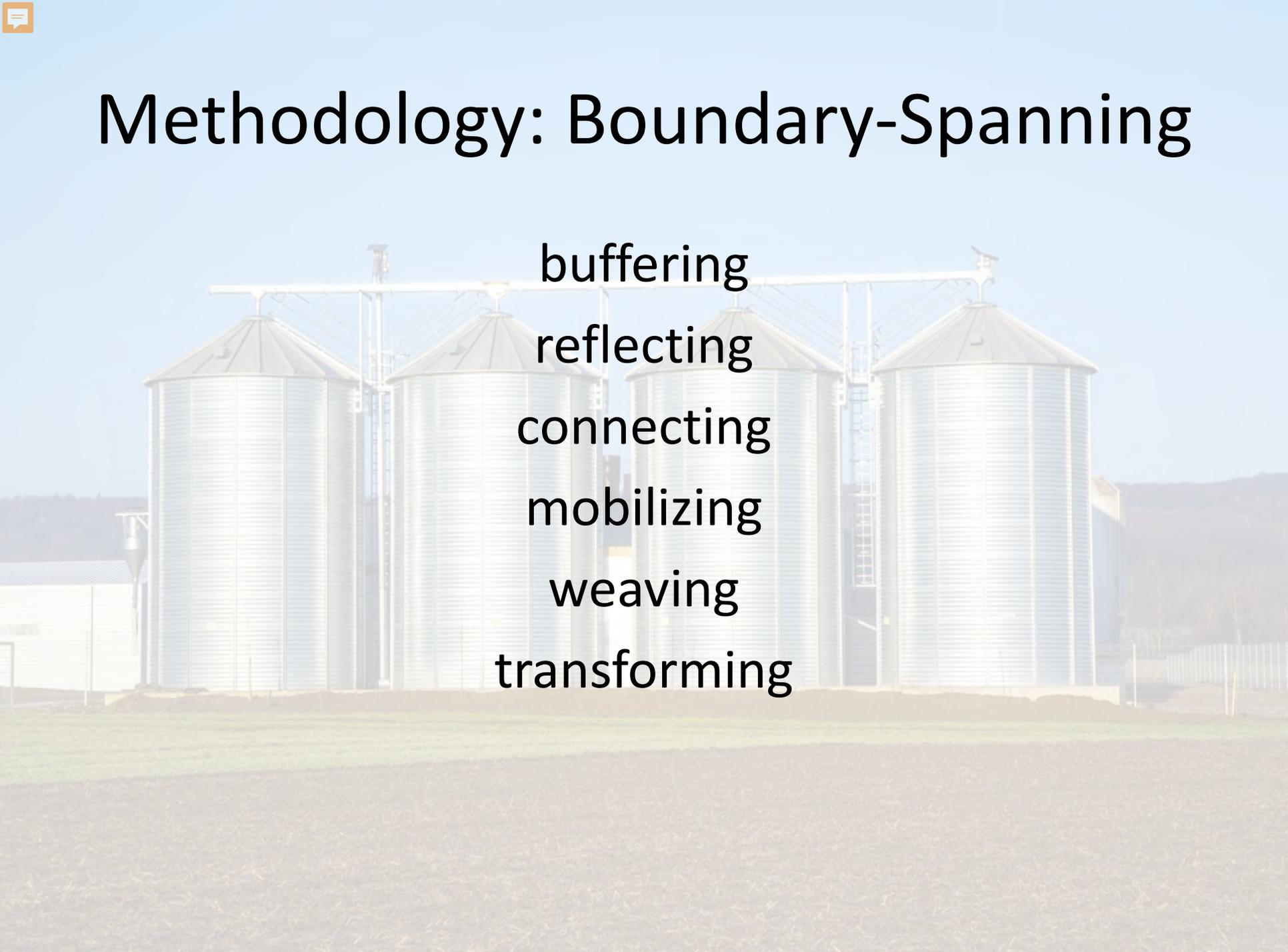
Change depends on the support of networks of people



alignment is a
transformative
tactic

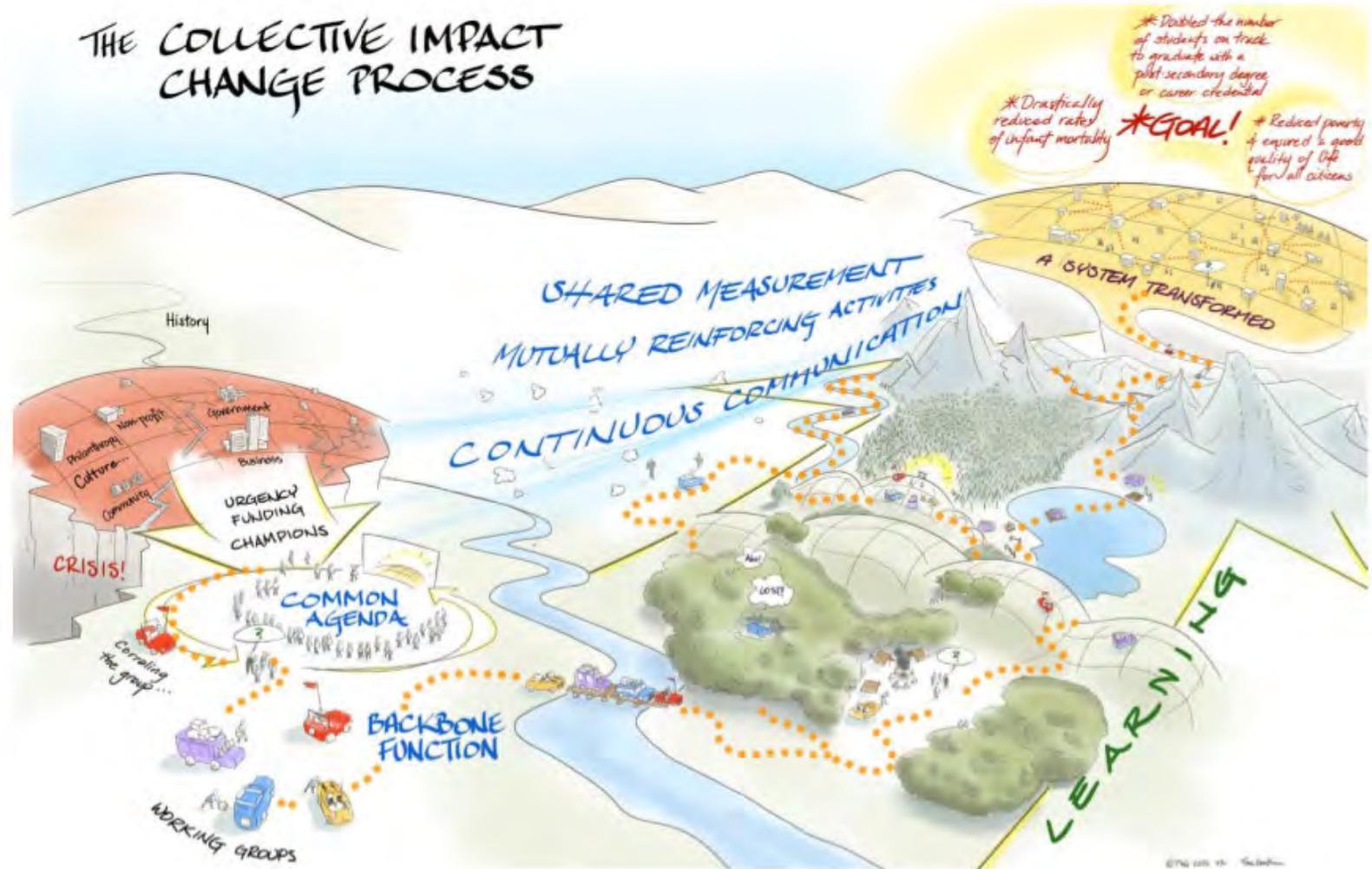


Methodology: Boundary-Spanning

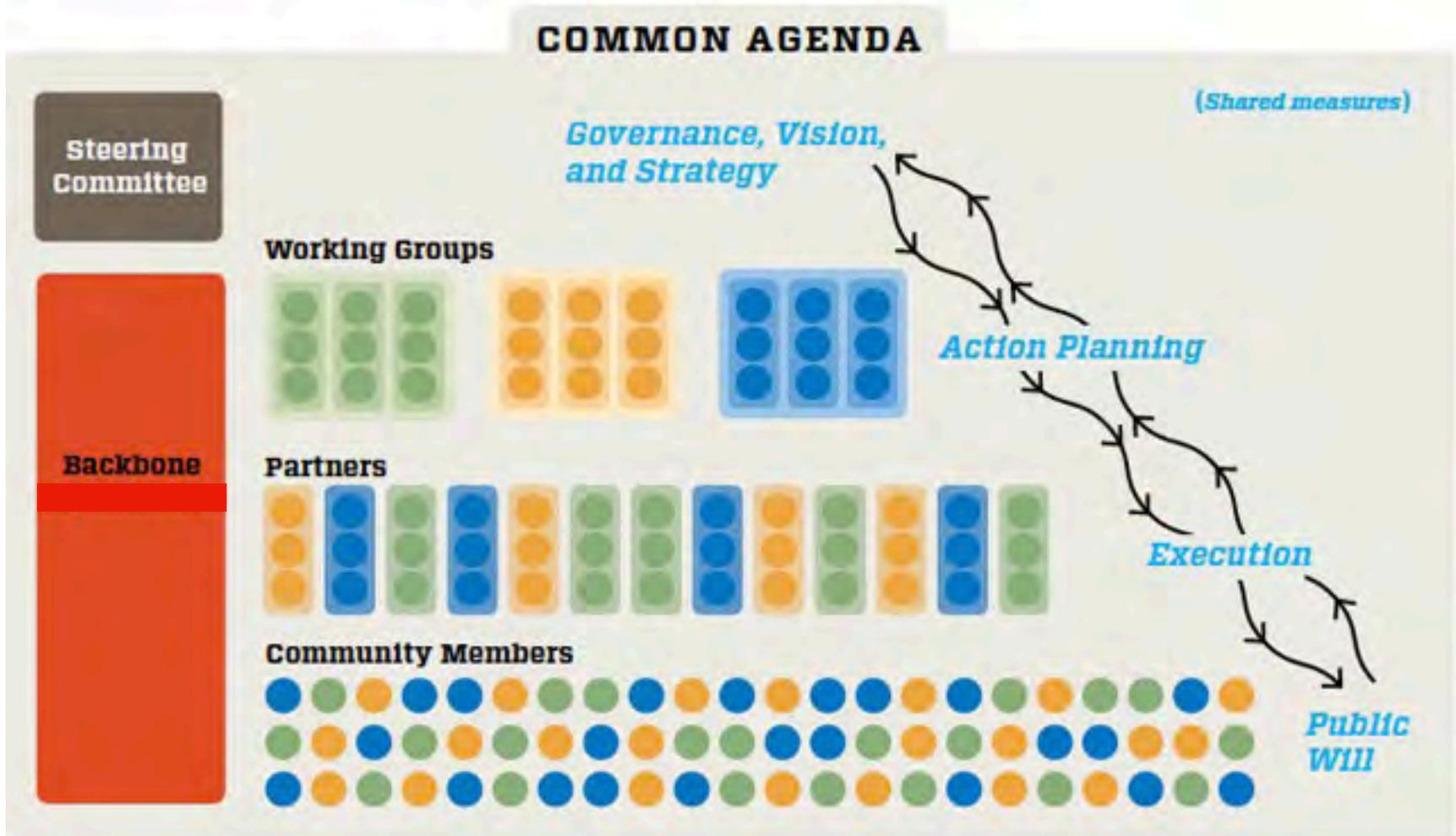


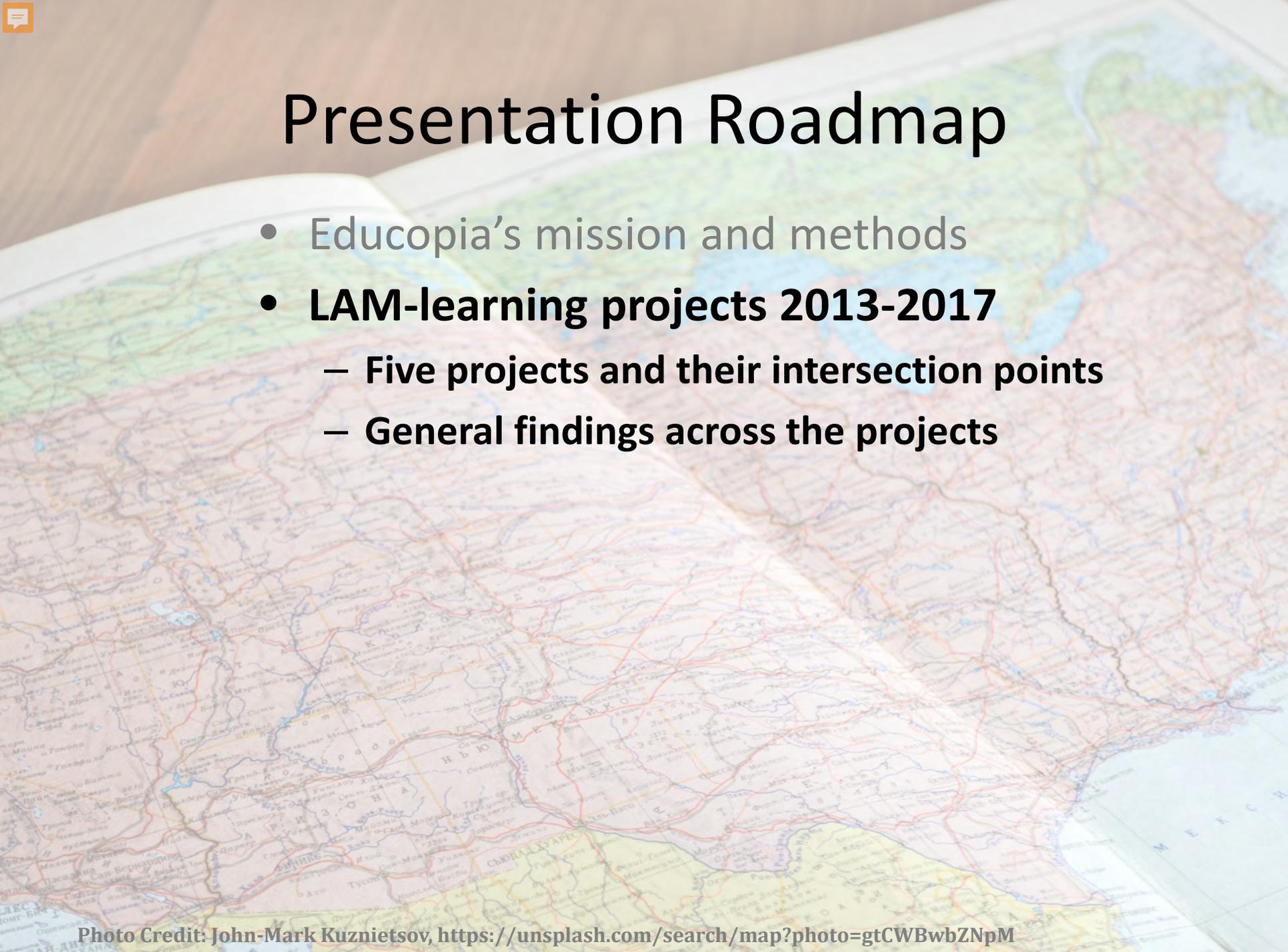
buffering
reflecting
connecting
mobilizing
weaving
transforming

Methodology: Collective Impact



Cascading Levels of Collaboration





Presentation Roadmap

- Educopia's mission and methods
- **LAM-learning projects 2013-2017**
 - Five projects and their intersection points
 - General findings across the projects



Four projects, intersecting goals

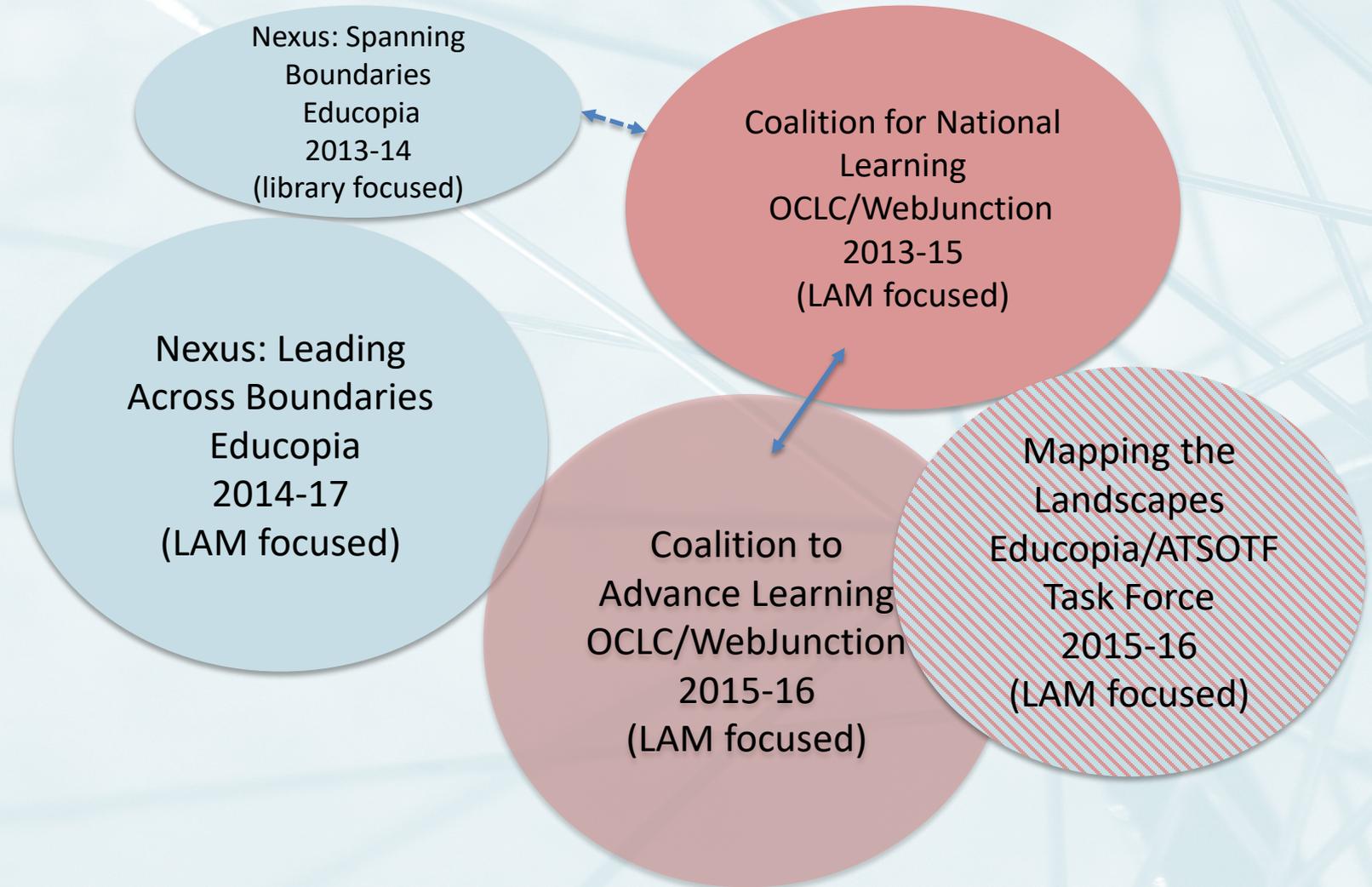
- “Nexus: Spanning Boundaries”
Educopia, 2013-14
- “Coalition for National Learning”
OCLC/WebJunction, 2013-15; 2015-16
- “Mapping the Landscapes”
Educopia, 2015-16
- “Nexus Leading Across Boundaries (LAB)”
Educopia, 2014-2017

First there were 2...

Nexus: Spanning Boundaries
Educopia
2013-14
(Library focused)

Coalition for National Learning
OCLC/WebJunction
2013-15
(LAM focused)

Then we grew...



Four projects, intersecting goals

Accelerate the spread of
good ideas

Access diverse perspectives across stakeholders

Increase impact and reduce duplication of effort

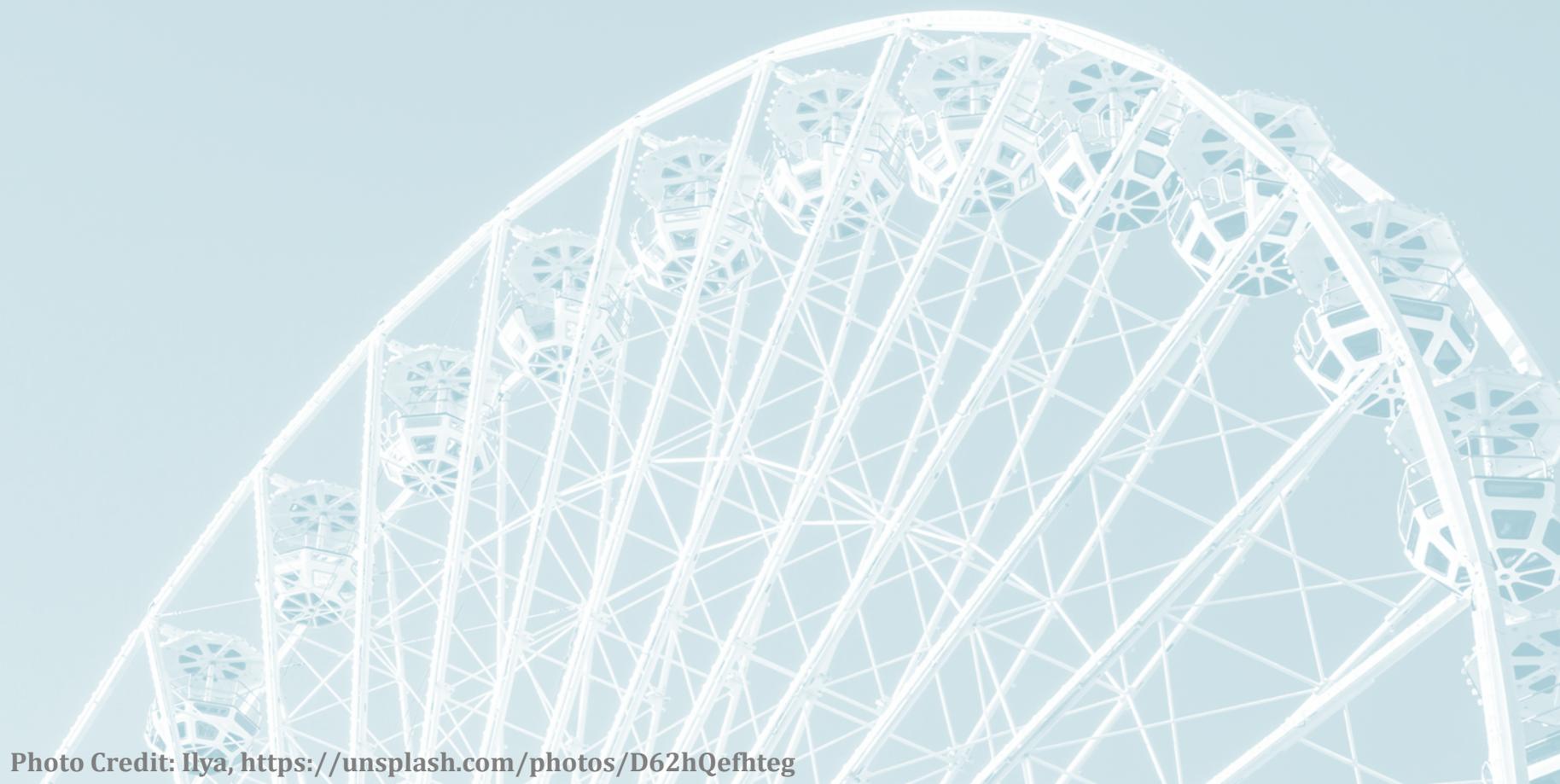
Develop and strengthen community

Scale and extend LAM learning



Theory behind the projects

Mission alignment positions libraries, archives, and museums to collaborate.





Finding #1

While LAM *missions* may be aligned, wide variance across them must be addressed

staffing models

funding models

organizational sizes

governance structures

user communities served

disciplinary specializations

acronyms and vocabularies

Finding #2

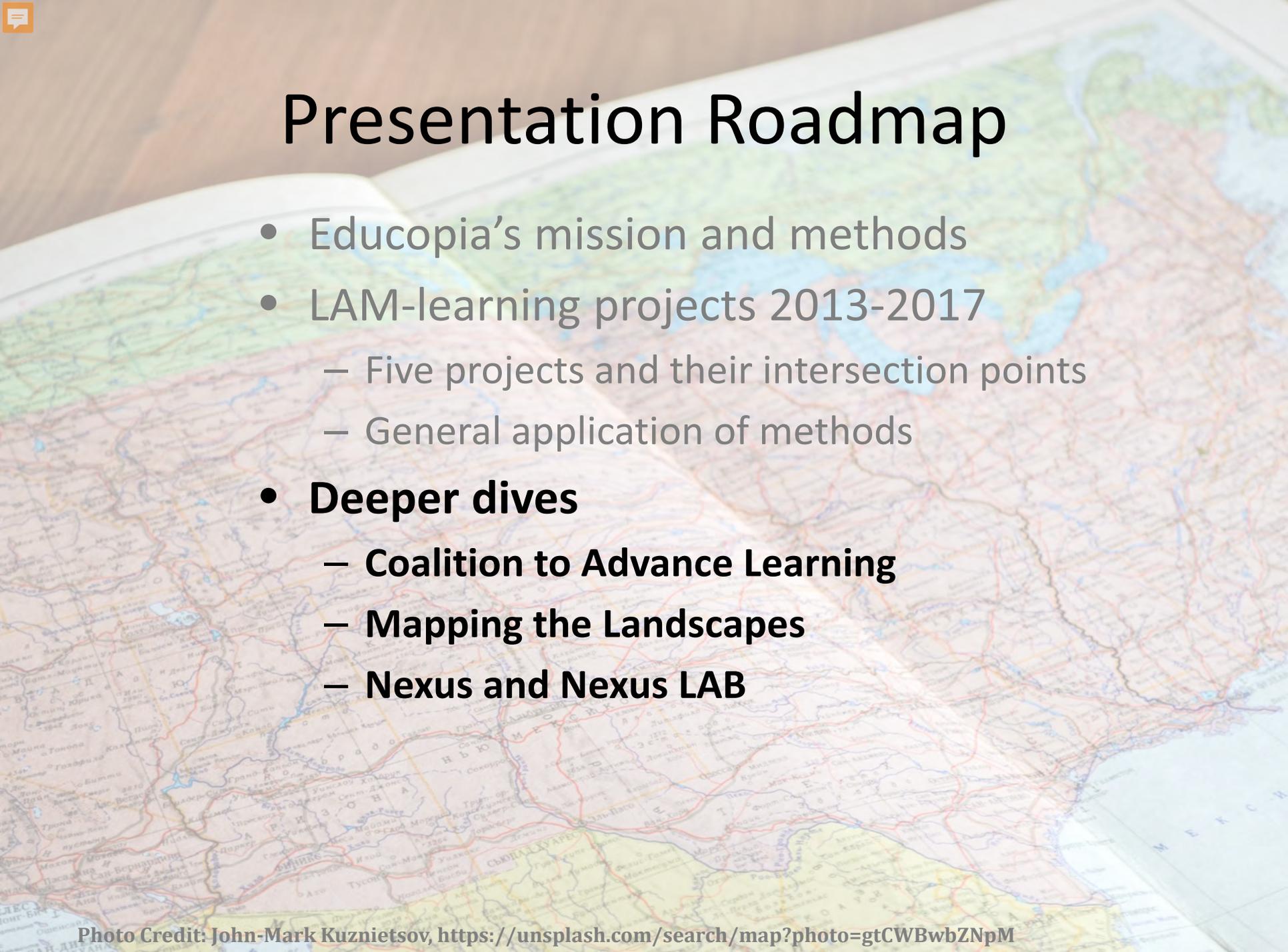
For multi-stakeholder initiatives, structure is key!

- Identifying an institution that can serve as “lead”
- Identifying the right stakeholders
- Mindfully addressing invitations (From whom? To whom?)
- Establishing a neutral meeting point and trusted “backbone”
- Reinforcing boundaries before attempting to span them
- Working towards concrete shared goals & *shared measurement*
- Cultivate “networked leadership”
- Design work so as to privilege all member voices and input
 - This last one is so much more difficult than it appears!

Finding #3

Areas particularly ripe for networked leadership:

- Education and professional development
 - Needs assessments, supply analyses, targeted offerings
- Technology transitions
 - Digital curation, digital forensics, digital preservation
- Funding, policy, and visibility challenges
- Leadership challenges
 - Succession planning

A detailed topographic map of North America, showing terrain, rivers, and cities. The map is slightly blurred and serves as the background for the slide. The title 'Presentation Roadmap' is overlaid on the top half of the map.

Presentation Roadmap

- Educopia's mission and methods
- LAM-learning projects 2013-2017
 - Five projects and their intersection points
 - General application of methods
- **Deeper dives**
 - **Coalition to Advance Learning**
 - **Mapping the Landscapes**
 - **Nexus and Nexus LAB**



Coalition to Advance Learning

3-Part Webcast Series

Stories of Inclusion: Inclusive Practices at Cultural Institutions

October 7, 14 and 28, 2015
2–3:30 p.m. (ET)



PROJECT MANAGEMENT 101: KEY ELEMENTS OF A PROJECT PLAN



COALITION TO ADVANCE LEARNING IN ARCHIVES, LIBRARIES AND MUSEUMS
6 FEBRUARY 2015

#LAMCOALITION

NATIONAL AGENDA FOR CONTINUING EDUCATION AND PROFESSIONAL DEVELOPMENT ACROSS LIBRARIES, ARCHIVES, AND MUSEUMS



THE COALITION TO ADVANCE LEARNING IN ARCHIVES, LIBRARIES AND MUSEUMS

LEARNING BETTER TOGETHER

The Coalition to Advance Learning aligns around a common purpose—to work in deliberate coordination across boundaries to advance sustainable continuing education and professional development (CE/PD) programs that will transform our profession and strengthen a nation of learners.



About Why Collaborate? Join Us News Calendar Resources Contact



Visiting students at the FDR Presidential Library & Museum. Image courtesy of the FDR Presidential Library and Museum

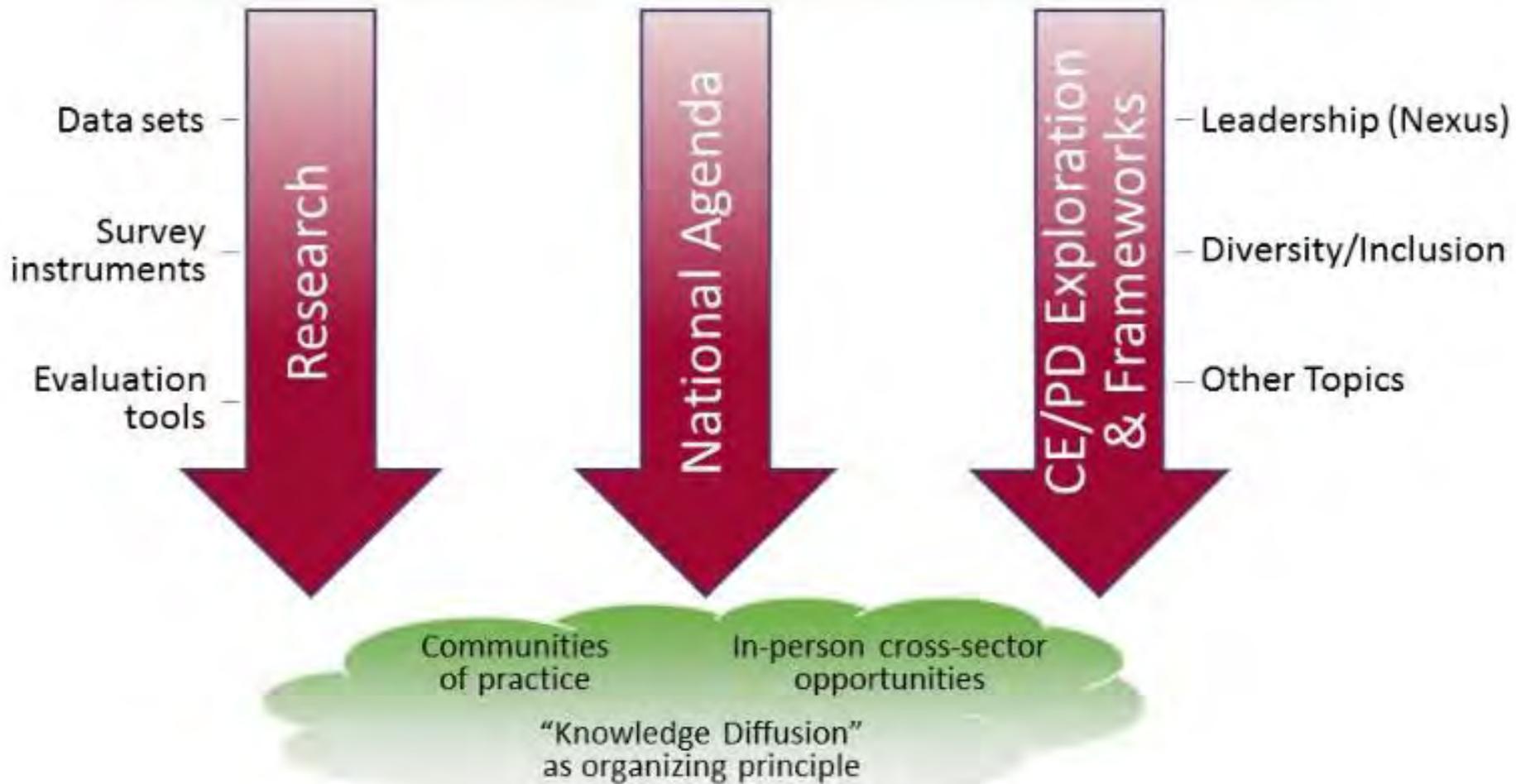


Welcome to The Coalition to Advance Learning in Archives, Libraries and Museums website!

Collective Wisdom: Libraries, Archives, and Museums (LAM) Conference Exchange



Coalition to Advance Learning





Mapping the Landscapes

Leverage community partnerships in order to document the continuing education/professional development needs of staff in and across libraries, archives, and museums

Mapping the Landscapes Team

- Academy of Certified Archivists
- ALA/SAA/AAM Committee on Archives, Libraries, and Museums (CALM)
- American Institute for Conservation of Historic and Artistic Works
- Association for Information Science and Technology
- Association for Library Collections and Technical Services
- Association of Academic Museums and Galleries
- Association of Children's Museums
- Association of College and Research Libraries
- Association of Midwest Museums
- Association of Research Libraries
- Association of Science-Technology Centers
- Association of Southeastern Research Libraries
- Califa
- Chief Officers of State Library Agencies
- Council of State Archivists
- Digital Preservation Management Workshop
- Educopia Institute
- Heritage Preservation
- InfoPeople
- Internet Archive
- Library Information Technology Association
- Lyrisis
- Midwest Archives Conference
- Mid-Atlantic Regional Archives Conference
- National Association for Interpretation
- National Association of Government Archives and Records Administrators
- New England Museum Association
- New Media Consortium
- North American Serials Interest Group (NASIG)
- Northeast Document Conservation Center
- OCLC
- Public Knowledge Project (PKP) School
- Public Library Association
- Regional Archival Associations Consortium
- Society of American Archivists
- Southeastern Museums Conference
- Urban Libraries Council
- Virginia Association of Museums

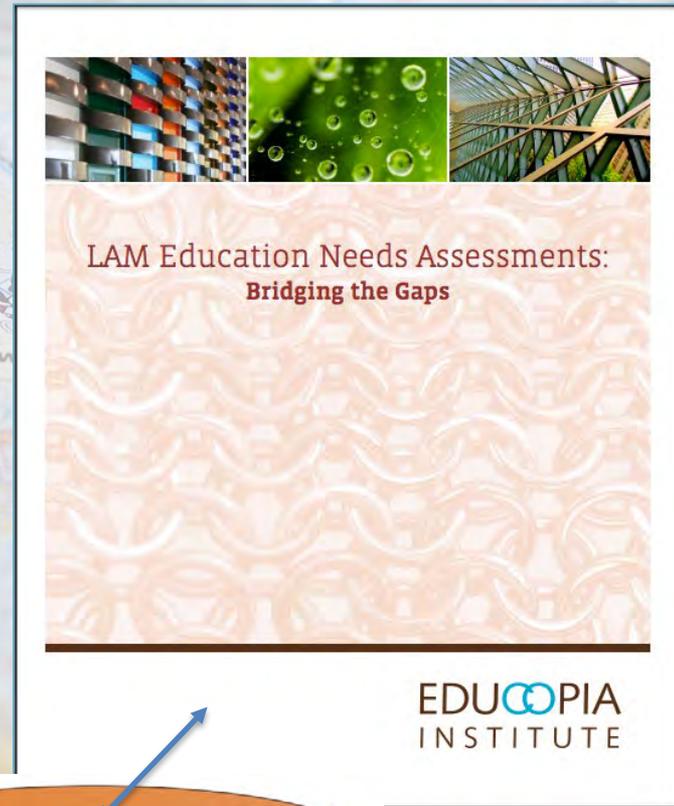
Mapping the Landscapes Team



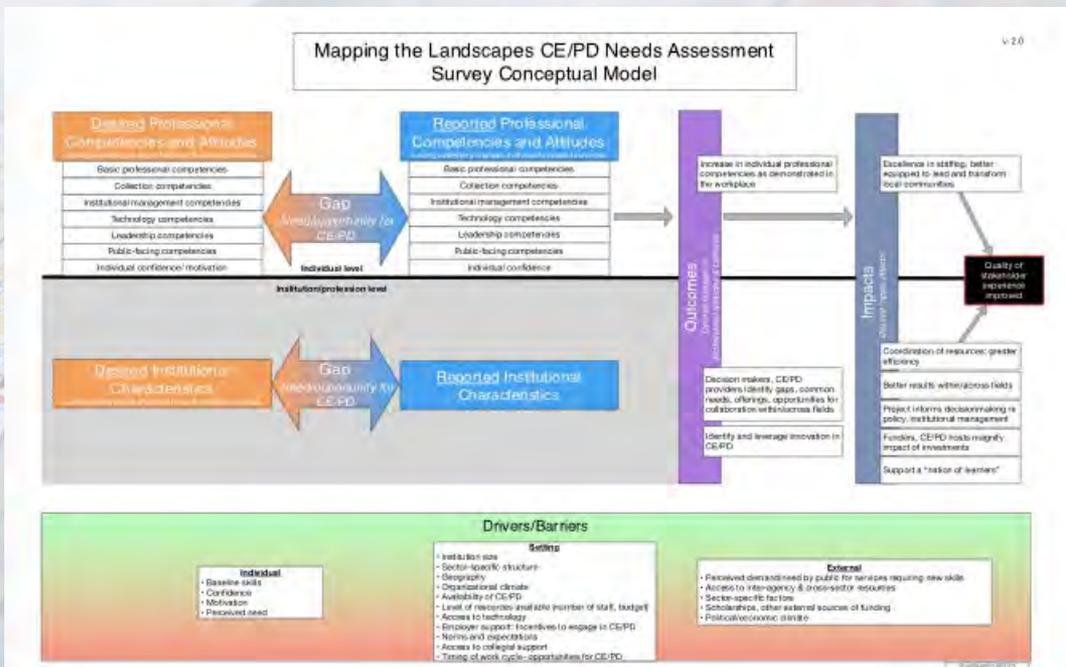
What we've produced

- Field Research
 - Spanning Boundaries report
 - Needs Assessment “how to” guide
- Focus Group methodology and questions
- Survey instrument and competencies map
- Data from surveys and focus groups
- Analysis
 - Self-Identified LAM Professional Development Needs
 - Tableau dashboards

Mapping the Landscapes



Mapping the Landscapes



Self-Identified Library, Archives, and Museum Professional Development Needs 2016 Edition

Compendium of 2015-2016 Mapping the Landscapes Project Findings and Data

Focus Groups hosted 2015-16:

- SAA
- AASLH
- ALA
- AAM
- Virtual

Mapping the Landscapes Common LAM Competency Taxonomy

98 shared competencies organized into:

- 6 areas: basic operations, collections, institutional management, leadership, technology, and public-facing
- 25 sub-areas (in total)

Table 2: Source lists of professional competencies

	Organizational Source	Competency Document
Archives	National Archives and Records Administration (NARA)	Competency Models – Core, General and Technical
	Society of American Archivists (SAA)	Guidelines for Archival Continuing Education (ACE)
Libraries	OCLC Online Computer Library Center, Inc. WebJunction	Competency Index for the Library Field
	Special Libraries Association (SLA)	Competencies for Information Professionals of the 21 st Century
Museums	International Council of Museums (ICOM)	Curricula Guidelines for Museum Professional Development
	Committee on Museum Professional Training, American Association of Museums	Training for Entry-Level Museum Professionals
	American Institute for Conservation of Historic and Artistic Works (AIC)	Defining the Conservator: Essential Competencies, and Requisite Competencies for Conservation Technicians and Collections Care Specialists

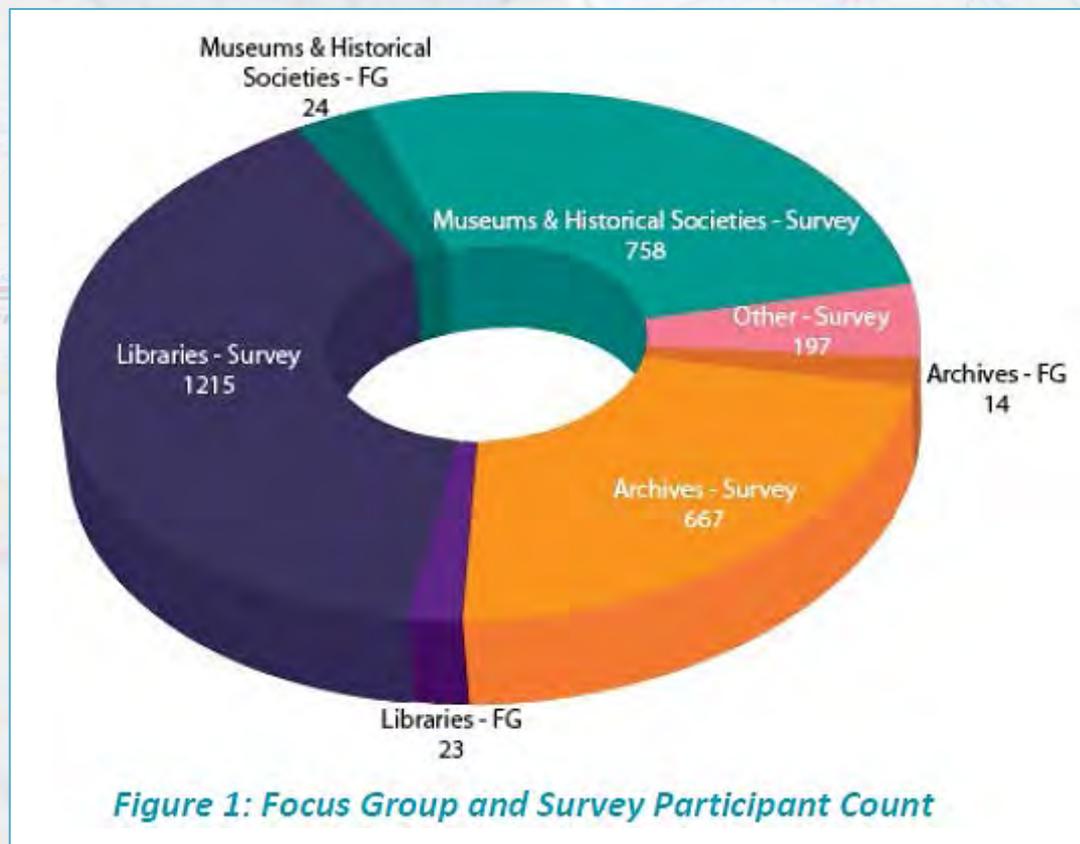
Competency Area	Competency Sub-Area	Competency
I. Basic	A. Research	1. Methodologies for research
		2. Technological platforms for research
	B. Project Management	1. Project management principles
		2. Lead work teams
		3. Monitor/Adapt project progress
	C. Awareness of Professional Context	1. Theoretical/historical professional underpinnings
		2. Basic professional models of practice
		3. Relationships with allied professions
		4. Record-keeping
		5. Professional standards and best practices
	D. Professional Ethics	1. Draw on basic values and ethics of sector
		2. Laws, regulations, institutional policies, ethical standards
		3. Culture of ethics/accountability
	E. Communication	1. Variety of communication methods
		2. Communicate effectively with diverse audiences
		3. Situation-specific communication
	F. Collaboration	1. Develop relationships to achieve common goals
		2. Work effectively in teams
		3. Manage org. politics, conflict, difficult coworkers

Institutional Management	A. Facility Design and Management	1. Encourage patron use
		2. Safe environment
		3. Well-run environment
	B. Organizational Planning, Policies, and Procedures	1. Understand laws
		2. Policies/procedures
		3. Strategic planning
	C. Supervision and Human Resources	1. Recruitment and selection of workforce
		2. Lead and empower employees
		3. Performance management strategies
		4. Performance management standards, requirements
		5. Work with consultants, volunteers
		6. Support staff career development
	D. Institutional Affiliations	1. Institutional credibility
		2. Information, feedback from advisory bodies
	E. Financial Management	1. Basic budget/ finance understanding
2. Financial processes		
3. Identify, pursue multiple funding sources		

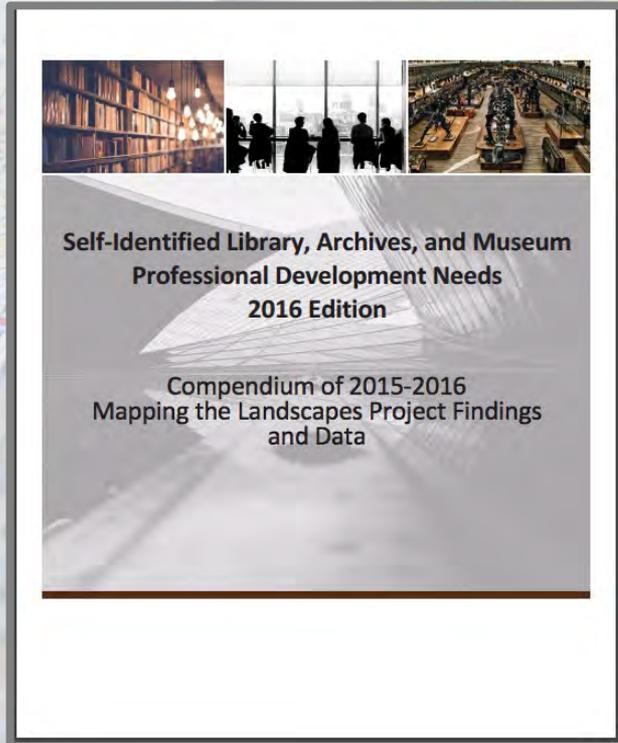
Mapping the Landscapes

Data sources

- 61 focus group participants
- 2,788 survey respondents



Mapping the Landscapes



- 1 Executive Summary
- 2 Data Reports and Analysis
 - Summary Survey Report
 - Preface
 - Background
 - Project strategy and survey conceptual model
 - Survey development process
 - Survey results
 - Archives/hybrid professional results
 - Basic competencies—Archives

Use PDF Bookmarks to navigate quickly to a competency area of interest.

63 / 296

Self-Identified Library, Archives, and Museum Professional Development Needs 60

Basic competencies—Archives

Survey Report Figure 51: Archives respondents' planning and decision-making level of need

Planning and Making Effective Decisions

Category	Have knowledge/skills for success	Need minor improvement	Need significant improvement	Not relevant to role
Short-term/long-term planning	42%	49%	8%	1%
Identify clear outcomes	51%	40%	8%	1%
Evidence-based decision making	28%	53%	18%	1%
Responsibility for decisions	60%	29%	7%	4%
Decisional transparency	51%	34%	5%	2%

Bookmarks

- Collections competenc...
- Institutional managem...
- Technology competenc...
- Leadership competenci...
- Public-facing compete...
- > Libraries/hybrid professio...
- > Museums/historical socie...
- > Additional explorative anal...
- Summary and next steps
- > Summary Focus Group Report
- > Individual Focus Group Sessi...



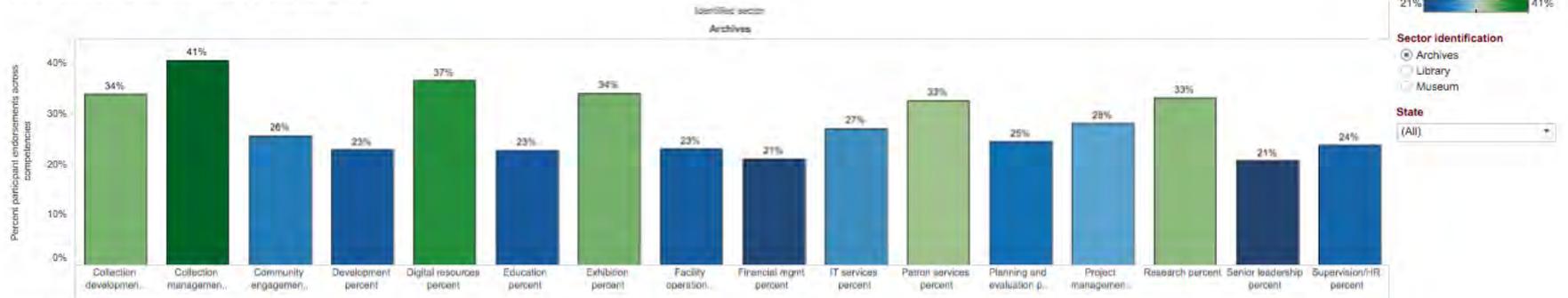
Tableau

Mapping the Landscapes Competencies and Confidence

See truebearingconsulting.com/mapping for supplementary resources

Identified critical competencies

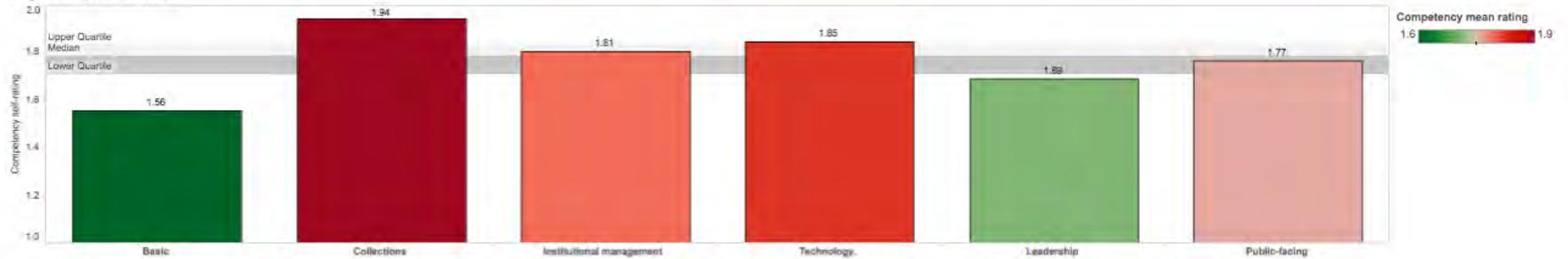
Competencies identified as critical to role
Multiple endorsements per respondent-- percentages do not sum to 100%



Competency composite

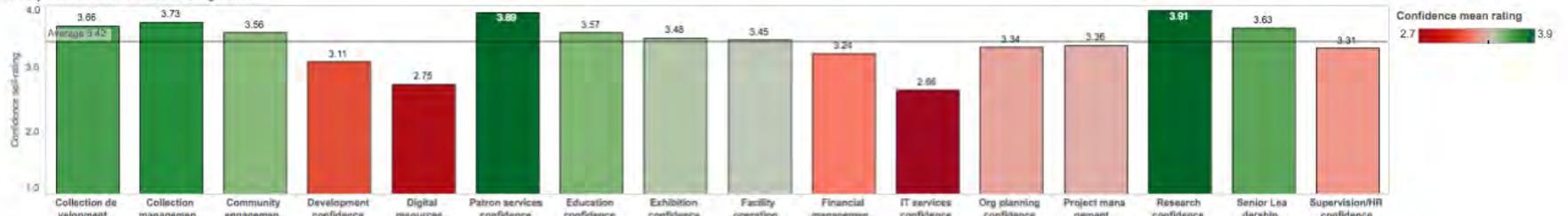
Lower scores are better

- 1: Have the skills
- 2: Minor improvement needed
- 3: Significant improvement needed



Confidence across competencies

- 1: Minimally confident within my role
- 5: Fully confident within and across settings/sectors





Nexus: Leading Across Boundaries (LAB)

Build a community for the experts providing museums, archives, and libraries leadership training to:

1. increase trainer capacity through cross-sector knowledge sharing and curriculum and evaluation resource development
2. develop a network of leadership trainers for cultural memory institutions



Nexus LAB Team

Archives

- Academy of Certified Archivists
- Archives Leadership Institute
- Council of State Archivists
- Regional Archival Associations Consortium
- Society of American Archivists

Museums

- American Association for State and Local History
- Association of Zoos and Aquariums
- Getty Leadership Institute
- Institute for Cultural Entrepreneurship
- Johns Hopkins Museum Studies Program
- Mid-Atlantic Association of Museums
- Mountain-Plains Museums Association
- Southeastern Museum Conference

Core Consultants

- Center for Creative Leadership
- TrueBearing Consulting
- Toolkit Consulting

Libraries

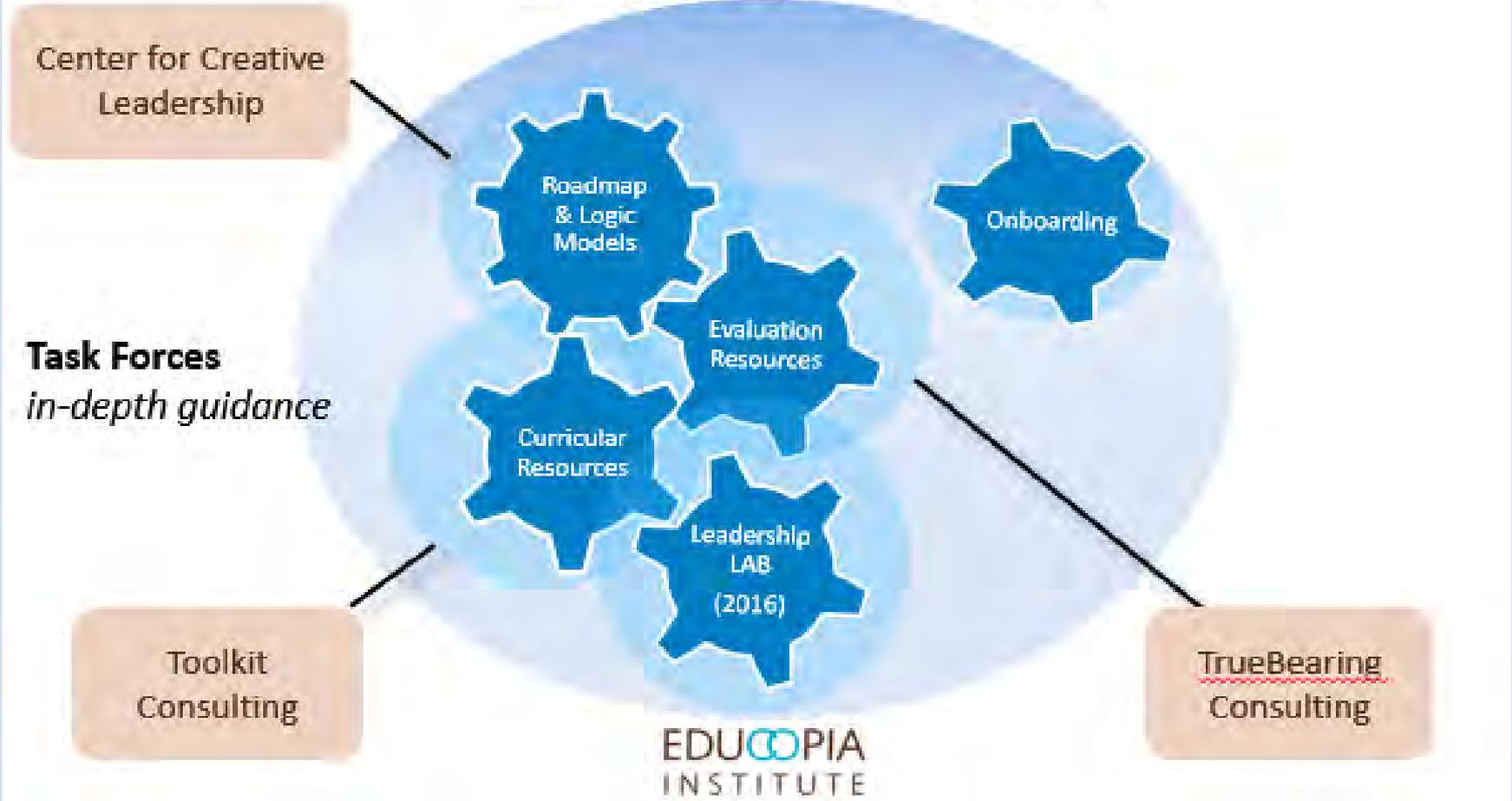
- ALA, Public Program Office
- Association of College and Research Libraries
- Association of Research Libraries
- Chief Officers of State Library Agencies
- Illinois State Library ILEAD U
- Medical Library Association
- National Library of Medicine / Association of Academic Health Science Libraries
- Online Computer Library Center
- Public Library Association
- Virginia Tech Libraries

Multi-Perspective

- Council on Library and Information Resources
- Dartmouth College
- Ithaka S&R
- Maureen Sullivan Associates
- University of North Carolina - Chapel Hill SILS
- University of North Texas

Nexus LAB Team

Advisory Board | *all project partners*



Nexus LAB: What we've produced

- **Common Leadership Competency Framework**
Layers of Leadership across Archives, Libraries, and Museums
- **Evaluation Suite (in pilot phase, open invitation)**
Pre/Post event and 3-6 month impact assessment tools connected to common competencies
- **Curricular Resources (in pilot phase , open invitation)**
Open, adaptable instructor guides, slide decks and learning aides for seven “leading the field/profession” level topics

Nexus LAB: Layers of Leadership

- Series of 6 frameworks
- Leadership competencies and related outcomes for each
- Co-produced and built upon CCL 360 by Design competency library

Draft Version – September 2016

Nexus LAB: Layers of Leadership across Libraries, Archives and Museums

Layers of Leadership: Key Roles and Challenges

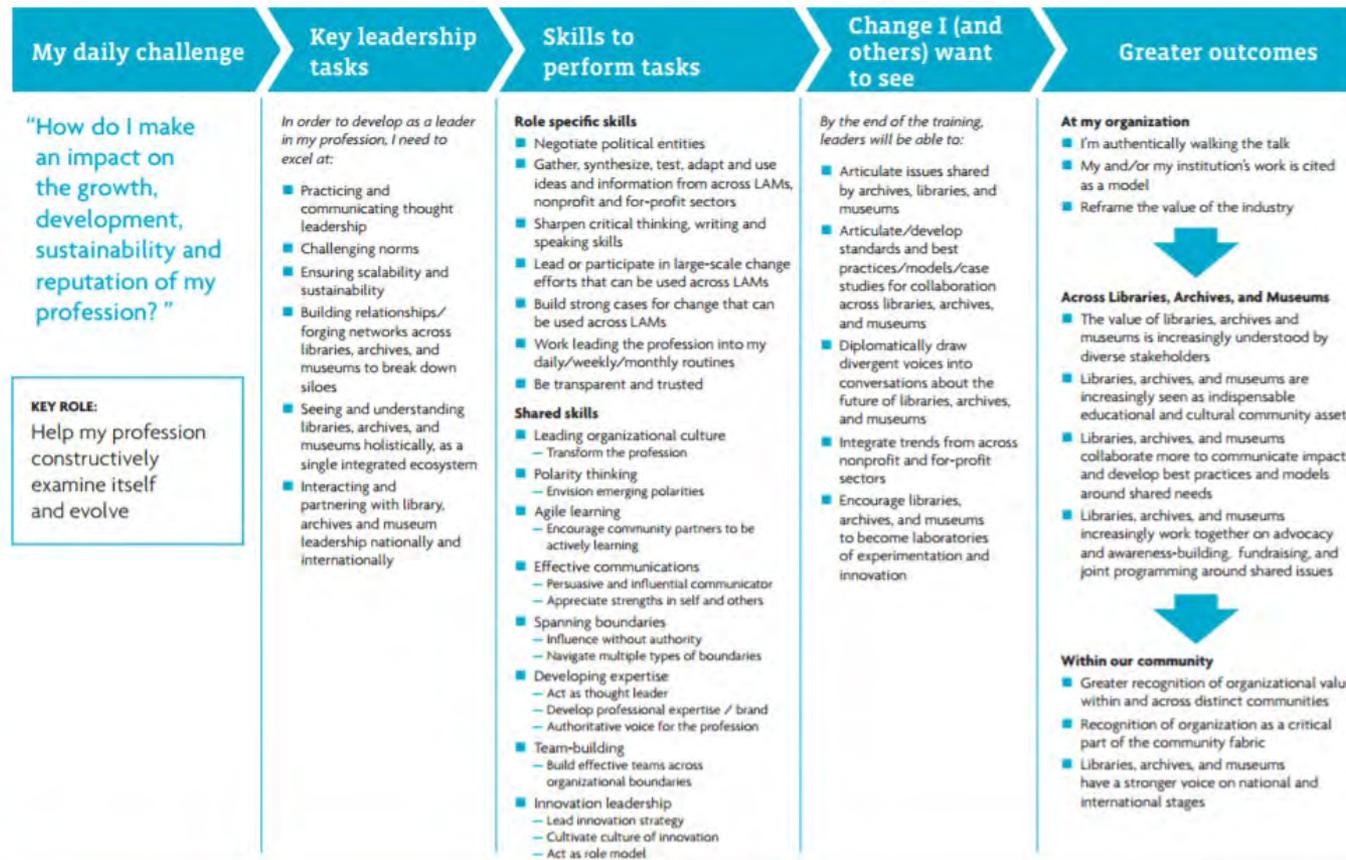
Role specific skills are developed at each stage. Common skills are also developed across all levels.

LAYER 1: Leading Self	LAYER 2: Leading Others	LAYER 3: Leading the Department	LAYER 4: Leading Multiple Departments	LAYER 5: Leading the Organization	LAYER 6: Leading the Profession
KEY ROLE: Pursue knowledge, assignments and responsibilities that expand leadership capabilities	KEY ROLE: Add value to position and organization with creative and transformative teamwork	KEY ROLE: Manage complex strategies and projects through cross-functional teams	KEY ROLE: Connect with broader internal and external systems	KEY ROLE: Envision and shape broader culture, organization and strategy	KEY ROLE: Help my profession constructively examine itself and evolve
CHALLENGE: "How do I navigate my organization in order to have impact, learn, and grow both technically and as a leader?"	CHALLENGE: "I'm good at doing my own work, but how do I get the work done through others?"	CHALLENGE: "How do I translate organizational culture and associated strategy into practical plans and objectives that my people can relate to and be measured on?"	CHALLENGE: "How might the collective performance of my departments be enhanced for the long term success of the overall organization?"	CHALLENGE: "How do I strengthen or transform my organization so it continues to be relevant and adds value to the communities we serve?"	CHALLENGE: "How do I make an impact on the growth, development, sustainability and reputation of my profession?"

Nexus LAB: Layer 6

Draft Version – September 2016

Nexus LAB: Layers of Leadership across Libraries, Archives and Museums Layer 6 – Leading the Profession: Design Framework



Online Evaluation Suite pilot using Layers of Leadership Frameworks

- Testing competency-based impact-oriented evaluation tools
- Online survey engine (Survey Gizmo) allows instructors to select relevant leadership competencies for learner survey generation.

Three assessments

1. Pre-event
2. Immediate post-event
3. Follow-up 3-6 month out

	My knowledge and/or skills need significant improvement to do this competently	My knowledge and/or skills need minor improvement to do this competently	I have the knowledge and/or skills to do this competently	I have the knowledge and/or skills to excel in this area	Not relevant
Moving from seeing things as problems to seeing, listening, and understanding different points of view	()	()	()	()	()
Establishing priorities based on context and being flexible in executing my duties	()	()	()	()	()
Team-building (e.g., working effectively with others)	()	()	()	()	()
Stepping back to gain a comprehensive view and assess situations	()	()	()	()	()



Nexus LAB: 7 Curriculum Modules

inspired by Layer 6 - *Leading the Profession/Field Layer*

- Plug and play design
- Designed to work within multiple types of offerings: conference sessions, pre-conference workshops, existing programs
- Unbranded – meant to be customized/branded by instructors and programs
- Piloting through summer 2017



Seven Nexus LAB Curriculum Module Topics

inspired by *Leading the Profession/Field Layer*

Articulating the Case for Change	2 hours 20 minutes
Engaging Diverse Stakeholders to Lead Change	2 hours 10 minutes
Are you Moving the Needle? Assessing the Impact of Advocacy Efforts	1 hour 50 minutes
Fostering Innovation and Creativity	2 hours 30 minutes
Positioning your Organization in Community, Economic and Social Issues	2 hours
Building a Networked Approach to Leadership	2 hours
An Advocacy Primer for Libraries, Archives, & Museums	2 hours 20 minutes

Curriculum Module Components

Trainer's Guide (.doc / .pdf)

session walk-through with exercises, talking points, examples, resources

Lightly formatted slides (.ppt)

for customization/branding

Learning Aids .doc / .pdf

Supporting in-class activities and providing take-aways

Building a Networked Approach to Leadership

Learning Objectives:

At the end of the session, participants will be able to...

- Describe why, when, and how a networked approach to leadership can be effective
- List challenges and advantages associated with sharing leadership in a cross-boundary network
- Recognize and mitigate reticence for participating in cross-boundary networks
- Consider whether it is appropriate to take a networked leadership approach in a given situation.

Target Audience & Delivery Mode

- **Audience:** LAM leaders interested in building or leading networks of community leaders and partners, and/or to develop their own networked leadership practice/approach.
- **Ideal class size:** Between 6-40 attendees
- **Ideal module length:** 2 hours
- **Ideal delivery mode:** In-person, instructor-led training to make the most of peer-sharing, discussion, and small group practice activity, but could be adapted for use online use given the introductory nature of the module.

Supplies/Materials/Set-up Needs:

- Slides to present key concepts
- Projector
- Flip chart paper and a way to post charts around the room (e.g. tape / easels / post-it chart paper)
- Markers for participants to write on chart paper

Set-up Notes:

- Participants at rounds of up to 8, or rectangular tables of 4 to support pairing up for discussions and small group activities
- Prior to start, put a piece of chart paper around room with the label "What is something you have worked within a network (formal or informal) to accomplish?" at the top. Have a piece of chart paper for every 8 participants (i.e. 12 people = 2 charts)
- Provide markers for each participant on the tables.

By the end of this session, you will be able to...

- Describe why, when, and how a networked approach to leadership can be effective
- List challenges and advantages of sharing leadership in a cross-boundary network
- Recognize and mitigate reticence for participating in cross-boundary networks
- Consider whether it's appropriate to take a networked leadership approach in a given situation

2) Define intermediate results and indicators. Use the table below to help you define intermediate results and how you can track progress toward them. NOTE: It is ideal to use this table from "Left-to-Right" so you can plan your campaign with the end in mind, but it can also be used "Right-to-Left" if you are already doing advocacy activities, but unsure what impact they are having.

ADVOCACY GOAL/PURPOSE (What is your ultimate desired change?)		
INTERMEDIATE RESULTS What will success look like along the way? What incremental changes may result from your efforts?	PROGRESS INDICATORS/MEASURES What are concrete, measurable ways to track progress toward the results? What evidence can you look for?	ACTIVITIES What will you DO to achieve this end/these results? What steps will be taken? By whom?
These should represent changes in attitudes, actions, knowledge, or environment that you want to result from your efforts. They are normally <u>quantifiable</u> and can include words like <u>increased</u> , <u>decreased</u> , or <u>eliminated</u> . These help you answer the question, "If our advocacy efforts are working, what changes can we expect to see?"	What indicators, evidence, or metrics could help you understand if you are successful in achieving the results? Indicate the <u>source</u> of the data and the <u>frequency</u> of how many? How often? Over what duration?	Activities are the tactics or tasks that <u>staff</u> , volunteers, and others will take on to help achieve the results and goal. Consider steps 3 and 4 below before working on your activities.
Short-term:		
Mid-term:		
Long-term:		

Pilot counts by target audience

	Libraries	Archives	Museums
Curriculum pilots <i>scheduled</i>	9	3	6
Curriculum pilots <i>tentative</i>	2		1
Evaluation pilots <i>scheduled</i>	11	2	5
Evaluation pilots <i>tentative</i>	8	2	

- Session reflected multiple times if serving multiple audiences
- 15 pilot sessions in total: 3 evaluation only, 4 curriculum only

Next steps

- Needs Analysis, next steps (organization and field-level analyses to triangulate with individual)
- Supply Analysis (initial research completed by LYRASIS)
- Test efficacy of Nexus model in another topical area of importance (technology? diversity and inclusion?)
 - interested in how we might benchmark and access and analyze evaluation data that is generated at the point of classroom evaluation



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