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### **The INCOLSA Management Institute: A Continuing Education Initiative for Indiana Librarians**

by Stephen H. Martin and Barbara Topp

INCOLSA (Indiana Cooperative Library Services Authority) is a multitype, library network with 760+ members. It is the primary provider of continuing education in the state of Indiana and receives state funding as well as grant monies to support this program. In response to needs expressed by Indiana librarians, INCOLSA developed The INCOLSA Management Institute, an intensive, high quality program designed to improve the management skills of participants. Hallmarks of The Institute include: a needs assessment to select the topics, focused three-day workshops on four core topics, professional presenters, grant support to keep The Institute affordable to a wide range of libraries, and the intention of repeating the cycle of classes every two years. While only in its first year, The Institute has already proved to be a highly successful endeavor.

#### **The Questions**

Who is preparing the next generation of Indiana library leaders? How well are they being prepared? As we visited member libraries, we found ourselves asking these questions.

In the past, several Indiana organizations have offered various types of management-oriented workshops. Some of these programs were high-quality and well-attended, but they were not tied together into any comprehensive, long-term repetitive scheme with the goal of producing competent library leaders.

We addressed the above questions and proposed that INCOLSA initiate a comprehensive, high quality, educational program called The INCOLSA Management Institute. The Institute's curriculum would be designed to build on an individual's formal education and to offer participants an opportunity to increase their management skills without having to return to a formal educational institution. The Institute would be attractive to participants from public, school, academic, or special libraries of all sizes. Some participants might be well-established and experienced librarians wishing to update their existing skills. Others might want to move into administrative positions but lack the requisite skills. Non-library-degreed personnel could also benefit.

#### **The Survey**

As member liaisons for INCOLSA, we both have an opportunity to keep in close touch with our members and are aware of their general continuing education needs. However, in

order to determine the best topics for The Institute, we sent a survey to the 760+ INCOLSA member institutions. The survey was distributed in both paper and electronic formats in order to reach the widest audience possible. We received 224 responses.

The first question, "What are your top three management needs?" resulted in responses that fell into three major categories: personnel management, leadership, and communication. Personnel-related topics included team management, hiring and firing, evaluation, motivation, problem employees, empowerment, and supervision. Leadership problems involved working within the community, with the library board, and with other librarians. Finally, a small but significant number of needs fell into the general category of communication. These responses proved valuable to the workshop presenters as they planned the program content of their respective sessions.

The second survey question asked respondents to rank six identified topics by order of importance. Ranked in order of the number of votes they received were personnel, planning, marketing, community relations, collection management, and grantsmanship.

The remaining survey questions dealt with logistics. In regard to the proposed three-day schedule format, about half preferred three consecutive days and half three separate days. Geography did play a role, however. People mentioned that if the programs were held far away from their library, it would be easier to attend on consecutive days. As for time of year, spring, summer, and fall got nearly the same number of votes.

## The Plan

We then mapped out a plan for The INCOLSA Management Institute using all the survey information we had gathered. The plan included the following list of parameters:

### **Class Schedule.**

Three one-day sessions would be spread over a three-month period to allow for individual homework assignments and independent study. It would be easy for both the instructor and the participants to fit three separate days into their schedules.

### **Classroom Setting.**

One of the hallmarks of the program is that it would be taught in a traditional classroom setting. Class size would be limited to allow for individual attention from the presenter and to give participants an opportunity to interact with each other.

### **Professional Instructors.**

The classes would be taught by qualified, paid professionals who have extensive training and experience in the subject area and also have a library background.

### **Homework.**

Homework assignments would be used to reinforce the classroom training. The instructor would determine the extent and appropriateness of assignments. It was expected that participants would learn skills that they could use immediately in their libraries, and

assignments would offer them a chance to see how well the classroom training could be applied to real life situations.

## **Repetition.**

An important characteristic of The Institute would be the repetitive or cyclical nature of the segments. In order to build a competent leadership and management base in our profession, we need to assure current administrators that these programs will still be there in two or four years. This would give them the ability to plan for their staff to attend the programs and receive the same training on a regular basis. We decided to present two classes a year over a two-year period and then repeat this cycle. The four subjects would be our members' top four survey choices: personnel, planning, marketing, and community relations.

## **Benefits.**

What would be the advantages of attending The Institute? First and foremost, participants would learn practical skills that could be applied in their libraries immediately after completion of the class. Another benefit would be the networking opportunity. Once back at their respective libraries, participants would retain the friendships and connections they formed during the class, and these relationships would form the basis of a long-term support group.

## **The Web Site**

The advent of The INCOLSA Management Institute resulted in some positive changes in the INCOLSA Web site and workshop registration procedures. First, we designed a special Web page for The Institute; it was the first time an INCOLSA workshop had its own page. To see it, go to [the INCOLSA web site](#) and use the pull-down menu to find the site. The Web page gave special status to the program and had information such as a speaker biography and picture and a map to the site. An extra feature was the ability to affix a "full" sign to the page when the maximum number of registrations was reached in order to prevent over-registration and the resultant need for calling members and returning checks.

Second, we developed a new online registration form that was linked to The Institute Web page. This form tracks data such as membership status of registrants, paid status, special needs, vegetarian meal count, etc. It also allows us to list registrants by last name, institution, and registration order, and to produce sign-in sheets and name tags.

The Web page was the primary marketing tool for The Institute. We mailed out a postcard that announced the program and directed people to the Web page for full information and the registration form. The INCOLSA member database has many search criteria that enabled us to send postcards to numerous personnel at our member libraries. An announcement was also put on the INCOLSA listserv several times with a link to the Web page.

## **The Outcome**

We are happy to report that The INCOLSA Management Institute is meeting with great

success. The first segment, "Practical Personnel Management," was scheduled for spring 2001 with Ellen Miller of The Ellen Miller Group as the presenter. It was announced on January 5, 2001, and in two weeks the class was full. The response was so positive we plan to repeat this class in 2002 for the overflow crowd. The second segment, "Planning with Purpose," was scheduled for fall 2001. It too was overwhelmingly well-received by the membership. Consultant Sharon Wiseman was the presenter. The third segment on marketing, scheduled for spring 2002 is entitled, "The Finely Crafted Library: Using Marketing to Design, Build, and Sell Library Services." The presenter will be Sara Laughlin of Sara Laughlin and Associates.

## So, How Do You Manage To Manage?

Today, if we should ask Indiana librarians this final question, we hope the answer would be, "With help from The INCOLSA Management Institute."

**Steve Martin** has been a member liaison for INCOLSA for the past four years. Prior to that he was the Director for the North Madison County Public Library System and of the Atlanta-Jackson Township Public Library, Atlanta. He began his library career as a bookmobile paraprofessional librarian at the Kokomo-Howard County Public Library, Kokomo. He can be reached at (800) 320-4469, or by [e-mail](#).

**Barbara Topp** has been the Continuing Education Coordinator and member liaison for INCOLSA for the past six years. Prior to that she was the Administrator of a regional Indiana network and the Assistant Director of the Public Library of Steubenville and Jefferson County, Steubenville, Ohio. She can be reached at (219) 985-0023 or by [email](#).

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50 E Huron St., Chicago IL 60611 | 1.800.545.2433