

Training the 21st Century Library Leader

A Review of Library Leadership Training, 1998-2013

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Errata: Training the 21st Century Library Leader

The errata list is a list of errors found and corrections made after the report was launched publicly on 04-02-2014. The following errata were submitted by our readers and approved as valid errors by the authors.

Location	Description	Submitted By	Date Submitted	Date Corrected
Page 19	The Archives Leadership Institute has a seven-day in-person program, not a two-day program.	Sasha Griffin	April 8, 2014	April 8, 2014
Page 19	The Archives Leadership Institute has had 156 attendees, not 128. The Editorial team will make this change to future versions of the dataset that Educopia will maintain for the community.	Sasha Griffin	April 8, 2014	

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1 Introduction

Leadership training opportunities for librarians abound in the U.S., as evidenced by nearly 40 leadership programs that were offered in 2013 either as one time (four programs) or ongoing annual/biannual events (35 programs). U.S.-based consortia, individual libraries, academic institutions, and non-profits serving the core library sectors (academic, public, special, and archival) provide dozens of institutes, workshops, on-line and blended programs, and other training experiences each year.¹ These leadership-training programs have varied widely, as have their results.

Many questions regarding these offerings remain unanswered. Are there identifiable theoretical models and implementation designs of “library leadership programs,” and if so, what does each style offer participants? Are models and designs consistent within and/or across sector boundaries? How many “library leaders” have been trained under these programs, and to what effects? How are evaluations performed, and which evaluation methodologies most effectively demonstrate the impact of leadership training?

This report provides a brief history of library leadership training in the U.S. context.² The report is based on data gathered and analyzed in a cross-sector review conducted from November 2013-February 2014 under the Institute for Museum and Library Services (IMLS) funded planning project: “The Nexus Project: Spanning Boundaries to Transform Library Leadership” (<http://www.educopia.org/research/nexus>). This review included literature (publications and white papers), web-based resources, a targeted survey with library leadership training programs, and interviews with key thought leaders in library leadership training. The dataset documents the spectrum of offerings that have served four major library communities—academic, public, special, and archival—between 1998 and 2013.

Due to time and budget constraints, the dataset upon which these findings are based is currently a beta version. We sought to be exhaustive in capturing U.S. activities and details via available documentation; however, programs that lack accessible, comprehensive written descriptions may not be reflected in this dataset. In our next phase of research, we will further refine the dataset, and we will issue it at the end of the project as an updated version.

¹ No single source documents all of these opportunities, but ALA’s website provides links to the most prominent offerings: <http://www.ala.org/offices/hrdr/abouthrdr/hrdrliasoncomm/otld/leadershiptraining> (last accessed 8-5-2013). Among the most cited programs are the Frye Institute (now the Leading Change Institute), ACRL/Harvard’s Leadership Institute; ARL’s Fellows programs; Illinois’s new I LEAD U program; and California State Library/InfoPeople’s institutes, but there are dozens of opportunities held across the country every year.

² The decision to constrain this research to the U.S. has been made consciously, due to the limits of time and resources available for this project. We acknowledge that more research needs to be conducted into library leadership offerings, both those hosted in other national contexts, and those that are deliberately international programs. We point to prospective research directions later in this report.

This report presents our research aims, methods, and findings. It is structured in four main sections, as follows:

- The *Introduction* provides an overview of the research project and explains the methodology governing our data collection and analysis.
- The *Background* section briefly contextualizes the findings through defining leadership training and library leadership training.
- The *Findings* present the research team's data and analysis regarding library leadership training between 1998-2013.
- The *Recommendations* provide a summary of next steps this research team recommends and will be involved in during 2014.
- The *Appendix* contains the codebook describing the dataset captured as part of the research phase.

1.1 Methodology

1.1.1 Data Inclusion

The pilot dataset spans a fifteen-year period from 1998 through 2013. Every program in the dataset meets the following criteria.

- *U.S.-based*: Programs had to be based in the U.S. and geared toward U.S. librarians.
- *Leadership focused*: Program curriculums demonstrably trained attendees in leadership skills, not management skills. As described below, these are separate skillsets. Some of the programs included in the dataset do contain a management-training component; all of the programs included contain leadership-training components.
- *Library focused*: Programs were included only if they focused primarily on librarians.
- *Run between 1998-2013*: Programs included actively hosted cohorts during some portion of this designated time span.

The dataset was used to record both ongoing and concluded activities.

1.1.2 Information Sources

The dataset was compiled through manual data mining of published reports, articles, websites, and promotional materials. For historical data, the team made extensive use of the Internet Archive's WayBack Machine to locate preserved copies of defunct, updated, and relocated websites. Please see the codebook for data coding guidelines utilized to ensure consistent data handling (*Appendix A*). Please see the *Bibliography* for a full listing of the published reports and articles mined.

In January 2014, after a preliminary dataset had been gathered, the research team submitted an email survey to the contact people associated with each program. The email contained a brief summary of the project and a full listing of their program's data entry, and it invited their feedback, corrections, and validation regarding the data we had recorded. Entries that were verified and/or adjusted through this review (26%) are marked as such in the dataset's "completion" field.

1.1.3 Dataset Characteristics

While each program is unique, conducting a broad analysis required classifying programs according to shared features. Because overly broad or overly specific categorizations can frustrate analysis, an effort was made to strike the correct balance. This investigation applied the following categories:

1. *Program Type*: The programs represent a wide range of designs and models. Some programs included features from multiple categories; such programs were assigned only to the descriptive category with which they shared the most characteristics.
 - a. Residential – Focus on a week-long, on-site experience; may include longer project.
 - b. Fellowship – Meetings spread over longer period, nine months to three years.
 - c. Workshop – one-day event.
 - d. Virtual – Webinar only program.
2. *Sector*: Many programs targeted specific types of libraries. These have been grouped as:
 - a. Academic – University libraries.
 - b. Archives – Special collection libraries and archives.
 - c. Public – Municipally funded libraries, including K-12 libraries.
 - d. Special – Industry or professional linked libraries.
 - e. General – All libraries.
3. *Audience*: Many programs targeted audiences based on their career stage or job title. The classifications varied from program to program (i.e., what one program might call “mid-career” another might call “early career” depending upon the way each defined its years of experience. The project team normalized these groups as:
 - a. Early career – not managers, first five years.
 - b. Mid-career – may or may not be manager, more than five years.
 - c. Senior management – e.g. directors.
 - d. All – all librarians.

Every effort was made to gather granular, year-to-year data to better understand the changes in leadership programs. However, this data was not always available for programs. For ease of data manipulation and analysis, locations were divided into cities and states, and dates were divided into years, months, and days. Where information on a specific program could not be located, such as a city or a day, the corresponding field was marked “null”. Programs that lacked both a clear presentation date and location were excluded from the “year-to-year” analysis table.

As of the publication of this white paper, the dataset is being released as version 1.0. However, the project expects to find more leadership programs and will release updated versions of the dataset as required. At the time of publication, the team discovered a style of leadership program that had not appeared in other literature, programs developed for and run by single university campuses. Programs that bear such a defined internal focus are more difficult to discover and account for; however, these will be added to the dataset as they are known.

As a final note, the constraints of the data do necessarily impact how it can be analyzed. Specifically, quantitative data analysis in this case was used to point to important gaps and trends and open up questions. This quantitative analysis was then substantiated by our team’s use of additional qualitative analysis to refine our understanding and ability to document what is happening in the broadly defined field of interest to this project.

2 Background

2.1 Understanding Leadership

Rapid change is perhaps the defining characteristic of the last half-century. The seismic impact of the print-to-digital paradigm shift has left few fields unaltered, world-wide. Age-old business practices throughout industries from banking to entertainment have given way to quick cycles of innovations, booms, and busts—and today, “standard operating procedures” are still missing for most fields, as is any sense of a “cradle to grave” career roadmap. In such a change-oriented environment, there has been a heightened need for strong, skilled leadership. There has also been a strong demand for continuing education opportunities that enable career-oriented individuals to build skillsets that can help advance their careers.

The study of *leadership* has a long legacy, of course, as evidenced by numerous early philosophical inquiries into this topic (e.g., Plato’s *Republic*). However, the rise of leadership development theories and programs over the last 50 years depended upon the development of a relatively new concept of *leadership*, defined not as a set of innate traits, but instead, as a set of competencies that can be learned.

As research transformed our understandings of leadership in the second half of the 20th century, a variety of professional development programs—many of which centered on commercial business markets—emerged, including programs embedded in business schools, continuing education programs, government-based training (especially military), and dedicated nonprofit and for-profit training centers (e.g., Center for Creative Leadership).

There are many definitions of *leadership*, and the most prevalent over the last thirty years have carefully distinguished between *management* and *leadership* as two different sets of skills, both of which can be learned. As noted by leadership author Warren Bennis (1989), *leaders* “master the context,” and pay attention to motivation, trust, and long-range perspective, where *managers* attend to administration, control, and short-range views.

Leadership training opportunities currently abound in many environments—from business schools to leadership institutes. Research centers have studied and documented specific leadership competencies required by particular fields and positions, and have designed programs that help attendees build those skills. Among the findings of the early 21st century is the key realization that when leadership development programs are “implemented in isolation of the business environment,” as noted by leaders at the Center for Creative Leadership, they “rarely bring about profound or long-lasting changes; therefore, organizations must develop leaders and leadership competencies that correspond with and are specific to their distinct business challenges and goals.”³

³ Hernez-Broome, Gina and Richard L. Hughes (2005) “Leadership Development: Past, Present, and Future.” *Human Resource Planning*. p. 28.

Rigorous evaluation methodologies have been devised and implemented in academic and research environments, and distinct schools and models of leadership training have evolved over the last few decades. As training has matured, classroom experiences have been complemented—and sometimes even largely replaced by—developmental experiences (e.g., coaching, mentoring, team-based work, practicums, 360-degree feedback). Classroom learning is now only one component of leadership skills acquisition; indeed, “increasingly, leadership and leadership development are seen as inherently collaborative, social, and relational processes.”⁴

Notably, the expansion of leadership training opportunities for librarians follows a trend of proliferation of leadership development (and leadership development methods) across many other fields as well.

2.2 Library Leadership Training Programs: Overview

By the late 1960s, management needs were beginning to be articulated specifically within the library field. At this time, the Association of Research Libraries (ARL), the Council on Library Resources (CLR), and the American Council on Education (ACE) together created a Joint Committee on University Library Management. Funding provided by CLR enabled this Committee to engage a consulting firm, Booz, Allen & Hamilton, in a study of university library management. The study yielded a report: *Problems in University Library Management* in 1970, and the findings inspired ARL to launch the Office of University Library Management Studies headed by Duane E. Webster. By 1976, this office began developing workshops, institutes, and tools to refine management skills for administrators in university libraries, especially around such issues as strategic planning.⁵ Although the early focus of the Office of Management Studies, or OMS (as it was called during the early years) was on management, this group was highly influential in designing and implementing training opportunities that laid a strong foundation upon which ARL built its leadership training offerings during the next decade.

In the early 1980s, Donald Riggs numbered among the first to mark leadership as a critical issue for libraries, questioning in the 1982 edited volume, *Library Leadership: Visualizing the Future*, why there were so few articles and books on this topic within the library field.⁶ Over the next three decades, a swell of research and activities regarding library leadership was documented in books, special issues, reports, and articles. Over these same decades, opportunities for librarians at many different levels (early, mid-career, management, senior administration) and from every sector (academic, public, archival, special) grew exponentially. Before 1982, there were no (known) “library leadership training”

⁴ Ibid, p. 31.

⁵ See “Strategic Planning Models in Academic Libraries” in Allen Kent, Ed. *Encyclopedia of Library and Information Science* Volume 59, Supplement 22: (pp 292-294). See also Lee Anne George and Julia Blixrud, “Celebrating Seventy Years of the Association of Research Libraries, 1932-2002”: (Washington D.C.: ARL, 2008). Accessed <http://www.arl.org/storage/documents/publications/celebrating-seventy-years-arl.pdf>

⁶ Riggs’s research demonstrated this scarcity, e.g., *Library Literature* only listed five entries for “librarianship” and “leaders” from 1975-1980.

experiences.⁷ By stark contrast, between 1998 and 2013, more than 200 distinct leadership-training events were offered to more than 8,000 participants in the U.S.

The first known U.S.-based leadership-training opportunities created explicitly for the library field began to appear in the 1980s, with the founding of the University of California at Los Angeles (UCLA) Senior Fellows Program (1982) and the founding of the Snowbird Institute (1989), each offering residential experiences to small groups of participants selected through an application process. Notably, these early programs aimed at two distinct populations. The UCLA Senior Fellows Program was designed explicitly for academic library directors and associate directors, while the Snowbird Institute was created to develop leadership skills in librarians during the first five years of their careers.

Library leadership training gained traction during the early 1990s, as rapid technical and organizational change became a new “normal” in the workplace, one that demanded different types of leadership and management. From 1990-94, at least five new library leadership programs began, including the Michigan Library Association Leadership Academy (1990), the Library Leadership Ohio program (1993), the Texas Library Association TALL Texans program (1994),⁸ and the Tribal College Librarians Professional Development program (1994). Each of these programs was designed around a *residential model*, usually lasting around five days. They differed in most other ways, including what participants they focused on (state v. national; academic v. public; minority status; years and level of career).

By the late 1990s, at least nine new programs had been established. Many of these also centered around a five-day residential model, including the University of Michigan Public Library Leadership program (1995), the North Carolina Library Association Leadership program (1996), the American Library Association (ALA) Spectrum program (1997), the Maryland Library Leadership Institute (1998), the EDUCAUSE Leadership Institute (1998),⁹ the University of Minnesota Institute for Early Career Librarians from Underrepresented Groups (1998), New Mexico Library Leadership Institute (1999), and the Association of College and Research Libraries (ACRL)/Harvard Leadership Institute (1999). As we will discuss later in this report, these programs varied greatly in the features they offered (some included practicums, field trips, mentorship, etc.) and the target audiences they served (minority librarians, academic librarians, public librarians, early career, mid-career, senior management, etc.).

In the 1990s, two of the first library leadership *fellowship* programs emerged, distinguished from the *residential* opportunities by their longer-term commitment (a year or more) and the use of multiple in-person meetings, coupled with other activities such as mentorship and practicums. The Association of Research Libraries (ARL) Leadership and Career Development program (1997) and the Southeast Florida

⁷ The ARL Office of Management Studies offerings were based in management theory, not leadership theory.

⁸ TALL Texans started its planning work in 1991, but hosted its first class in 1994. Throughout this report, we have tracked the dates when training events occurred, not the dates of the planning process.

⁹ Although EDUCAUSE primarily serves higher education’s information technology specialists, many of whom work in an IT division, there is significant cross-over, and many librarians have been trained through this program.

Library Information Network (SEFLIN) Sun Seeker Leadership Institute (1999) were geared toward different target audiences, with ARL focusing on midcareer academic librarians from underrepresented racial and ethnic groups, and SEFLIN focusing on Florida-based librarians from any library type and any stage of career.¹⁰

Library leadership training opportunities expanded dramatically around 2000, with nearly 50 separate programs and more than 150 events offered between 2000-2009.¹¹ These new programs included a richly diverse range of models, including residential, fellowship, and workshop opportunities. Notable newcomers included the Council of Library and Information Resources (CLIR), EDUCAUSE, and Emory University-sponsored Frye Leadership Institute¹² (2000); the National Library of Medicine and American Association of Health Sciences Libraries (NLM/AAHSL) Leadership Fellows Program (2002); the Urban Library Council's Executive Leadership Institute (2002); the Illinois State Library Synergy program (2002); the ARL Leadership Fellows Program (2004); the Eureka! Leadership Program (2008); and a broad range of IMLS-Library Services and Technology Act (LSTA)-funded state-based initiatives in Nebraska, Nevada, New Jersey, Massachusetts, Florida, Iowa, New York, and Georgia. Many of these LSTA-funded initiatives were spiritual successors of the Snowbird Institute, which had ended in 1999.

More than a dozen short, (0.5-1.5-day) workshops were developed between 2000-2009 as well, including the Library Administration and Management Association (LAMA)/ALA Leadership Survival Kit (2000); ACRL's Service, Management, and Leadership: Essential Tools for 21st Century Librarians (2001); PALINET's Everyday Leadership: Bringing Out the Best in You! (2002); American Association of School Libraries' (AASL) Collaborative Leadership Institute (2003); and the LAMA¹³ Leadership Development Seminar (2006). Unlike the residential and fellowship programs, these lower-investment events tended to be open to all members of a membership organization (e.g., Medical Library Association, PALINET) or to be open to anyone who wanted to attend. They were most often held in conjunction with major events, including ALA meetings.

Growth of new programs has slowed considerably over the last five years, with an additional three fellowship programs (ILEAD U, INELI, ILEAD USA), five residential programs (Virginia Library Leadership

¹⁰ See Neely, Teresa Y. (2009) "Assessing Diversity Initiatives: The ARL Leadership and Career Development Program." *Journal of Library Administration*, Volume 49, Issue 8, pp 811-835; Curry, Elizabeth A. and Jeanette Smithee. (2009) "Developing Leadership in a Multitype Library Consortium: Ten Years of SEFLIN Sun Seekers." *Resource Sharing and Information Networks*, Volume 20, pp 18-34.

¹¹ Of the 47 programs identified by our research team, 13 were offered once. Another 15 were offered between two and 10 years, and fully 19 are still ongoing at the time of writing in 2014. Several of the programs from the previous decade were also offered during this decade, bringing the total number of known events between 2000-2009 to approximately 200 events.

¹² The Frye Institute blended features from both the residential and fellowship models, and provided a deep-dive, two-week immersion experience at Emory University to kick off the year-long program.

¹³ Notably, the Library Administration and Management Association (LAMA) became the Library Leadership and Management Association (LLAMA) on September 1, 2008, with 90% approval from its membership (<http://www.llama.ala.org/llamaleads/?m=200806>). This is another marker of the maturation of the *library leadership* concept in the library field.

Academy, American Library Association Leading to the Future, Public Library Association Leadership Academy, New Jersey Leadership Academy, and Leading Change Institute¹⁴), one workshop (Association for Rural and Small Libraries), and four virtual training experiences (most hosted by LLAMA). As growth has slowed, diversity has continued to increase, in part because newer programs are building on, responding to, and intentionally distinguishing themselves from existing efforts. These diversity increases are evident in the forms, frameworks, and focuses of the newer programs, as we will describe in more detail in our *Findings* below.

Studies have not yet demonstrated the impact of these far-ranging programs, nor have they documented which library leadership areas remain underserved by existing offerings. Most evaluations have taken place at the program level, and these have been conducted using a wide variety of evaluation methodologies and practices—some rigorous, and others far less so.¹⁵ To date, although a few of these projects and programs have produced brief environmental scans of these leadership-training opportunities, none has produced a comprehensive assessment of this activity, either within a specific library sector (e.g., academic libraries or public libraries) or across these communities.¹⁶

Even so, U.S. investments in leadership training endeavors continue to increase, with foundations, grant agencies, and consortia all focusing significant effort and resources toward improving the leadership capacity of the field. The Institute of Museum and Library Services and the Bill & Melinda Gates Foundation, along with other agencies and foundations, provide millions each year to existing programs and new program designs around library leadership topics. This continues to be defined as a high funding priority for IMLS and the Gates Foundation in particular. For example, in 2013, the Bill & Melinda Gates Foundation/WebJunction issued a *Global Libraries Report* based on research conducted with 3,000 public library respondents. These respondents named “visionary, effective leadership” as one of the top two key attributes of future libraries. The top two funding priorities recommended to the Global Libraries Initiative in support of this attribute were collaborative efforts between/among libraries and training and skills development.¹⁷ Likewise, IMLS’s Strategic Plan 2012-2016 focuses an objective of Strategic Goal #1 explicitly around supporting training and development of museum and library leadership so that they can meet the needs of diverse users in a time of fast-paced change.¹⁸

To ensure that our national investment in leadership has the greatest possible impact, the Educopia Institute, in collaboration with diverse meta-organizations that offer leadership-training opportunities, is conducting a research study in 2013-2014 to gather and analyze data demonstrating the state of

¹⁴ The Leading Change Institute is a recasting of the Frye program.

¹⁵ ARL’s work in this area is particularly notable: <https://connections.ideals.illinois.edu/works/25990> and <http://www.tandfonline.com/doi/abs/10.1080/01930820903396830?journalCode=wjla20#preview> (Accessed 08-08-2013).

¹⁶ See for example InfoPeople’s 2002 report (ibid).

¹⁷ WebJunction (2013). “Stakeholder Engagement Survey Results”. http://www.webjunction.org/news/webjunction/Stakeholder_Engagement_Survey_Results.html (Accessed 08-07-2013).

¹⁸ IMLS, Strategic Plan 2012-2016, p 10.

leadership training in the library field today. In so doing, we hope to lay the groundwork for a needs assessment the project team will perform in conjunction with the Center for Creative Leadership (CCL) to identify crucial competencies that library leaders (defined broadly) need to develop in order to continue transforming the field for the 21st century and beyond.

In the next section, we provide detailed findings from our initial data gathering and analysis. The dataset is openly available, as are a range of visualizations. We provide links to these resources in the bibliography.

3 Findings

3.1 Library Leadership Training, 1998-2013: Trends and Highlights

Between 1998-2013, there were at least 13 fellowship programs, 39 residential programs, 16 workshops, and seven virtual programs hosted in the U.S. on library leadership topics. Many of these programs have been run for multiple years, for a total of more than 300 distinct events. This substantial number of programs has produced numerous graduates: at least 1,697 from fellowships, 5,990 from residential, 140 from workshops, and 192 from virtual programs confirmed during data collection.¹⁹ By any measure, this is a significant training output, one that warrants close study to understand who has been trained, to what end(s), by what models, and what effects these programs have had.

Several notable findings stand out from this research, as we discuss further at the report's conclusion. First, the diversity of library leadership training opportunities offered today, and indeed, over the last 15 years, is so wide that meaningful categorization and comparison of programs by "type" or "purpose" is difficult at best. Via the data available, we found only limited consistency in methodology, structure, topics covered, and evaluation of outcomes across programs.²⁰

Second, there is a notable lack of shared objectives or "leadership competencies" driving these diverse offerings and evaluations of their successes/failures. There are no structural relationships between these continuing education offerings, and as a result, there is also no common set of credentials gained from attending programs. Anecdotal evidence, as well as information gathered by specific programs, suggests that a significant subset of library leadership trainees have attended multiple programs in order to gain access to the skills training and networks they sought.²¹ This evidence likewise suggests that

¹⁹ There are also an unknown number of local events hosted by individual libraries that are missing from our dataset and analysis due to the lack of readily available documentation on these typically one-off or internal training opportunities.

²⁰ Notably, our project team did not have access to curricula for most events. However, we were able to compare program features, program missions, evaluations, and other components from both the journal articles and open websites that we mined for such details.

²¹ E.g., 38% of the 2008 Synergy participants noted that they had engaged in other leadership training activities prior to attending Synergy. (See "Evaluation of Synergy: The Illinois Library Leadership Initiative" June 2009.)

geography plays a large role in attendee’s program selection—and in the availability of leadership programs for prospective attendees.²²

These findings suggest a field-wide need for substantive needs assessments regarding where unmet demand for training is highest, and what competencies are most needed—by individuals, organizations, sectors, and the field as a whole. Using targeted information regarding a variety of factors—geography, library sector, career level, skill types—library leadership programs could begin to define more effectively the specific skills and career transitions they are designed to address, and these offerings could be provided across a continuum that matches more deliberately the existing need base in the U.S. This shared framework could also enable the creation of common evaluation frameworks and clear expectations regarding the success metrics a program should be able to produce.

In the following sections, we elaborate on the findings produced within this bounded study. We then discuss recommendations for next steps.

3.2 Models and Features

In our analysis, we discovered that multiple labels were self-applied to programs by their hosts and founders, including *Institute*, *Fellowship*, *Program*, *Seminar*, *Network*, *Academy*, *Symposium*, and *Summit*. These labels lacked consistent meaning in terms of style, format, length, features, and other characteristics. In order to provide

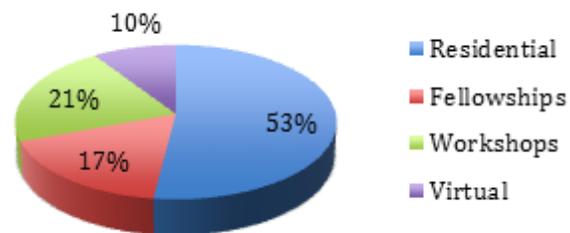


Figure 1. Library Leadership Program by Type

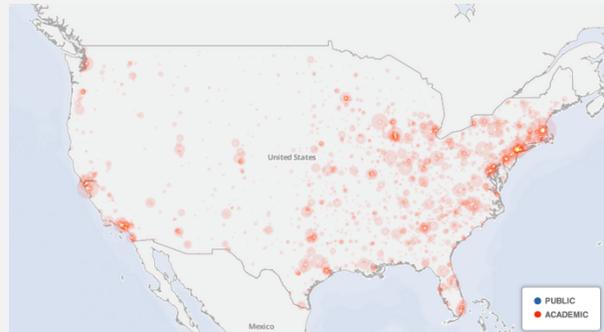
comparisons between the different types and models of leadership training, the research team identified four main categories of training: *Residential*, *Fellowship*, *Workshop*, and *Virtual*, as demonstrated in Figure 1. Notably, these categories are not models, but instead each includes a relatively broad range of programmatic implementations, as described below.

All statistics reported here are minimum bounds.

3.2.1 Residential

Residential denotes an intensive event (usually four to five days) in which attendees reside on site and remain with their peers for the event’s duration. Residential programs are time-bound events, usually featuring little pre- or post-work for attendees (although some do include a post-program project). They are characterized by one concentrated period of training.

²² This last point is worthy of deeper analysis, especially because geographical disparities in leadership training are evident. The vast majority of library leadership education takes place roughly east of the Mississippi River. Due to data constraints, the project did not track the home state of attendees represented in the dataset. The difference in distribution needs further analysis.

Case Study**Leadership Institute for Academic Librarians***Total Attendance:* 1291*Years Run:* Annually since 1999*Program Duration:* 6 days*Cost:* \$2900*Target Audience:* Academic librarians with managing responsibilities, library deans, and campus administrators*Map:* Distribution of academic libraries

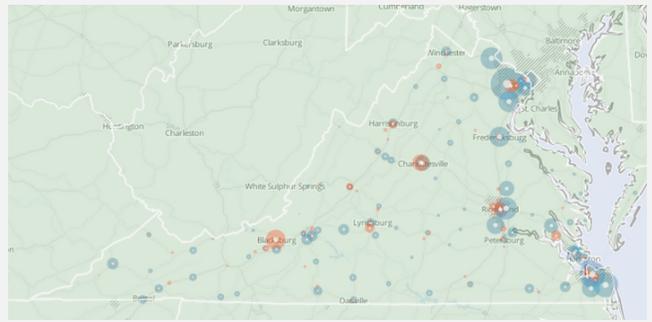
The Leadership Institute for Academic Librarians is one of the longest-running leadership programs in the library field. The annual collaboration between the Harvard Institute for higher education and the ACRL began in 1999 under the ACRL presidency of Maureen Sullivan. Classes are large, ranging from 75 to 105 participants. Attendees learn from both presentations to the entire group and frequent daily meetings in small, assigned discussion groups. The curriculum mixes library and general perspectives in the daily reading assignments, case studies, and experience sharing, teaching attendees a conceptual framework of leadership and encouraging them to apply it to their role at their library.

Residential programs accounted for 39/75, or 52% of the programs represented in our dataset. They also trained 5,990/8,019, or 75%, of the attendees identified through our research. Residential programs consistently include lectures (39/39) and discussions (39/39). Residential programs often include additional features, including case studies (30/39), networking opportunities (26/39), and guest speakers (23/39). Residential programs less frequently include features such as projects (17/39), mentors (16/39), webinars (5/39), and field trips (5/39).

Residential programs concentrate heavily on the academic (9/39) and general library (26/39) markets, with a few aimed directly towards public (3/39) and archival (1/39) markets. These programs are geared towards the broadest range of audience types, including mid-career (11/39), early career (11/39), general library (10/39), and senior (6/39) audiences, making this by far the most diverse in terms of target audiences served.²³ More than half (24/39) of these events are ongoing annually or biannually, and their founding dates range from 1982 to 2013, with a median of 2002.

Residential program host organizations tend to be state library associations, national library associations, and universities. Funding sources most often include grant funding (IMLS LSTA: 9/39; IMLS: 6/39; NHPRC 1/39, ILAF 1/39), foundations (6/39), state library associations (4/39), national library associations/consortia (3/39), state libraries (2/39), corporate sponsors (2/39), donations (1/39), and institution/attendee investments (27/39). The average known cost of these programs to attendees is \$1,300, and they range from \$0 to \$5,000. Three of these 39 programs operate at no program charge to attendees.

²³ Note that one program's audience is unknown at this time.

Case Study**Virginia Library Leadership Academy (VALLA)****Total Attendance:** 46**Years Run:** Biannually since 2010**Program Duration:** 2 days**Cost:** \$350**Target Audience:** Current and prospective leaders in Virginia Libraries**Map:** Academic and public libraries in Virginia

Led by Dr. Robert Burgin, a library consultant from North Carolina, and administered by the Virginia Library Association, VALLA is a two-day leadership program. The Academy planning committee chose this length as a balance between requiring the leave-of-absence necessary for a five-day institute and allowing for deeper immersion than a one day workshop. However, the Academy extends beyond the two days of lessons and activities in Charlottesville. Attendees communicate through a Google Group prior to the Academy and complete a year-long project when they return to their libraries. The planning committee deliberately chose a site in central Virginia to make the program accessible to all regions of the state. It runs the program every two years to ensure a full candidate pool, and seeks to keep costs associated with participation at a price point acceptable to a majority of librarians.

3.2.1.1 Fellowships

Fellowship denotes a longer-term investment, usually nine months or longer, in which attendees come together for several short (usually one to two day) in-person meetings and complete other training components off-site. These programs are more likely to include mentorship and other enrichment opportunities alongside classroom-based training. They are primarily characterized by meeting repeatedly over a long period, with partial programmatic focus on building fellowship and networking between participants.

Fellowships accounted for 13/75, or 17% of the programs represented in our dataset. They also trained 1,697/8,019, or 21%, of the attendees identified through our research. Fellowships are quite variable in terms of their features. Most offer lectures (12/13), networking (12/13), mentors (10/13), discussions (10/13), projects (8/13), and webinars (7/13). Many also include field trips (6/13) and case studies (6/13).

Fellowships aim primarily towards a general library market (9/13), although a few programs specialize in public (2/13), academic (1/13), and special (1/13) libraries. Fellowships also aim disproportionately toward early career audiences (6/13), with only three programs addressing general career audiences, two programs geared towards mid-career audiences, and two programs aimed toward senior administrators. More than half (8/13) of all fellowships are ongoing annually or biannually and their founding dates range from 1997 to 2013, with a median of 2005.

Host organizations tend to be state-based associations (7/13) or national library associations/consortia (5/13). Funding sources most often include grant funding (IMLS-LSTA: 4/13; foundations: 3/13), association investment (3/13), corporate sponsors (3/13), and institution/attendee investments (4/13).

In a few cases, there are dual investors (e.g., ALA/LAMA/World Book sponsorship of the “Leaders of the Pack” program, 2004-2006). The average known cost of these programs to attendees is \$1,400, and they range from \$0 to \$12,000. Five of these thirteen programs operate at no program charge to attendees.

3.2.2 Workshops

Workshop denotes a short-term investment, usually one to two days. Workshops are often hosted adjacent to national conferences. These programs are less likely to include enrichment opportunities alongside the workshop.

Case Study

MLA Continuing Education Workshops

Total Attendance: Unknown

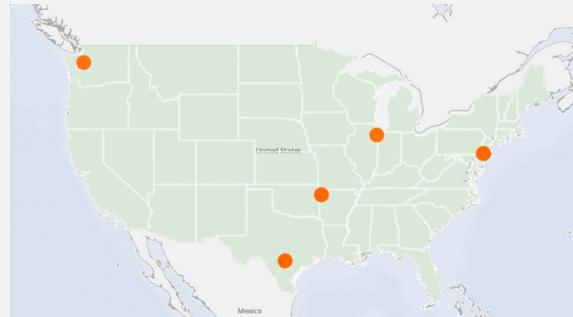
Years Run: At least one per year since 2005

Program Duration: .5-1 day

Cost: \$210-530

Target Audience: Medical librarians

Map: Locations of MLA Conferences since 2005.



In 2002, the Medical Library Association held a symposium to discuss the need for leadership development in its sector. One of the outcomes of this conference has been an active development of leadership workshops offered as part of the continuing education courses during every annual MLA conference. These workshops have been led both by trainers with cross-sector experience such as Maureen Sullivan and by leaders from the medical library field such as Natalie Reed. With few having external funding, they must rely on attendance fees for sustainability. At the same time, the workshop format requires less support. As a result, leadership workshop topics have incorporated prevailing trends in leadership training from other sectors and found varying degrees of long-term traction as new programs are created.

Workshops accounted for 16/75, or 21% of the programs represented in our dataset. They trained 140/8,019, or 2%, of the attendees identified through our research.²⁴ Workshops contain fairly standard features. All offer lectures (16/16), and most offer discussions (13/16). Fewer include other features: case studies (5/16), guest speakers (5/16), networking (2/16), and projects (1/16). None included field trips, mentors, or webinars.

Workshops aim primarily towards special library markets (8/16), or a general library audience (4/16), although a few programs specialize in academic (2/16) and public (2/16) libraries. Workshops also aim mainly toward general career audiences (9/16), with three geared towards mid-career, two geared toward early career, and two unspecified. Almost all workshops are held only one year (10/16), with two programs running for two and three years, respectively, and two additional programs running in an ongoing manner. Their founding dates range from 2000 to 2012, with a median of 2005.

²⁴ Note that only two of these sixteen workshops had attendance numbers available.

Host organizations tend to be national associations (15/16) with one state-based library association (1/16). Funding sources include participant fees (10/16), grant funding (IMLS 1/16), and corporate sponsors (1/16). The average known cost of these programs to attendees is \$180, and they range from \$20 to \$520.

3.2.3 Virtual

Virtual denotes an off-site investment, with no in-person interactions. Virtual programs are less likely to include enrichment opportunities.

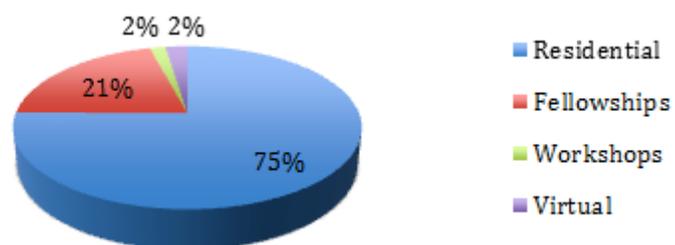
Virtual programs accounted for 7/75, or 9% of the programs represented in our dataset. They trained 192/8,019, or 2%, of the attendees identified through our research.²⁵ Virtual programs contain fairly standard features. All offer lectures (7/7) and webinars (7/7). A few include other features, such as case studies (4/7), discussions (2/7), and guest speakers (2/7). None included networking, projects, field trips, or mentors.

Virtual programs aim primarily towards a general library market (6/7), with one program specializing in academic libraries. Virtual programs also aim mainly toward general career audiences (6/7), with one geared towards mid-career attendees. Almost all virtual programs have been held for only one year (5/7), with one program running in an ongoing manner since 2003. Their founding dates range from 2003 to 2014, with a median of 2010.

Host organizations are mostly national associations (4/7) with one academic institution (University of North Texas) and one non-profit library group (OCLC). More than half of these virtual offerings (4/7) have been hosted by the Library Leadership and Management Association (LLAMA). Funding sources are unknown, as is the average cost of these programs to attendees. Only two programs in our dataset listed pricing (minimum \$25; maximum \$200).

3.2.4 Additional Observations

The four program types identified by our research team provide an important lens through which we can analyze library leadership training structures and features over the last 15 years.



As shown in [Figure 2](#), in our dataset, the vast majority (75%) of attendees [Figure 2. Library Leadership Attendees by Program Type](#) have participated in *residential programs*. However, the workshop (1%) and virtual (2%) attendees are much harder to track due to limited information in published and web-based forms. Still, the dominance of the *residential* model stands out, particularly in programs launched between 1998 and 2001 [which include 13 residential programs (72%), three workshops (17%), and two fellowships (11%)]. A closer look at the data shows the growth in diversity of programs from 2001 forward, with the founding of 25

²⁵ Note that only one of the seven virtual programs had attendance numbers available.

residential programs (46%), 12 fellowships (22%), 11 workshops (21%), and six virtual opportunities (11%).

These shifts in programmatic models are addressed explicitly through reports and articles written by some of the newer programs. These programs—including ILEAD U (itself a follow-on to Synergy) and the Virginia Library Leadership Academy (VALLA)—deliberately evaluated existing options and made considered choices based on the strengths and weaknesses they perceived in each approach. For example, VALLA’s founders determined that stumbling blocks for residential-heavy programs (4-5 days) included the difficulty prospective attendees had in affording the travel/lodging/programmatic costs associated with these intensive events, and the similar challenges prospective attendees faced in scheduling a week-long absence from their jobs and/or families.²⁶ VALLA determined that 1-2 day residential experiences, paired with self-directed, year-long projects, would enable greater participation in the leadership training experience.

As we will discuss in more detail below, programs are offered to a range of attendees, including general library (28), early career (19), mid-career (17), and senior administration (8). Of particular interest here are the “early career” programs, which are geared toward new librarians in the first five years of their careers. A disproportionate amount of fellowship programs (6/13) and residential programs (11/39) are aimed at these early-career participants relative to mid-career fellowship programs (2/13) and residential programs (11/39), as well as senior administration fellowship programs (2/13) and residential programs (6/39). This may be due to the increased difficulty many prospective attendees face in carving out a full week from their job (and often family) responsibilities to attend more time intensive programs. Also notable, the “early career” programs have a lower average cost-to-participants than most, which suggests that these programs are subsidized by other groups, including funding agencies and library associations.

Numerous articles and reports have suggested there is a need, currently unmet, for schools of library and information science and iSchools to add “leadership development” to their curriculum offerings. If library school programs provided leadership (as distinct from management) training to their students prior to graduation, this might allow a portion of the funds currently directed towards “early career” librarians to be redistributed toward other high-need categories, including mid-career and senior administration audiences.²⁷ It also might lay the groundwork to better coordinate and align training opportunities as a vertical curriculum that begins in graduate school, and then continues through a series of “early-career,” “mid-career,” and “senior administration” leadership training offerings. We will discuss this further in the “Recommendations” section of this report.

²⁶ See http://scholar.lib.vt.edu/ejournals/VALib/v57_n4/pdf/hensley.pdf.

3.3 Geographic Locations

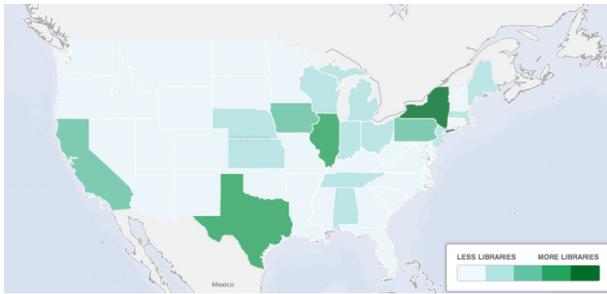
Analysis of the geographical views and maps generated from the dataset requires several points of clarification. First, every data point used in the mappings represents a program, and those programs varied greatly in length, attendance, type, and many other variables. To address this issue, each of the following maps visualizes only one of these variables at a time. Second, the dataset has captured as many individual instances of each leadership program as possible, such that if a program was taught annually from 2008-2010, each program instance would be represented (three instances total). The instance dataset represents 61/75 (81%) of all programs in the dataset, of which 238 of 321 instances (75%) had enough information to map a specific city (as opposed to a region or state).

In order to provide context regarding the number and density of libraries nationally, we have mapped two library sector surveys, the Public Libraries in the United States Survey collected by IMLS annually and the Academic Library Dataset collected by National Center for Education Statistics biennially. Unfortunately, no comprehensive directories of special libraries or archives were available, but we believe the surveys used provide sufficient background for a preliminary analysis. This sector-based information can help funders and hosts identify the ideal geographic distribution of potential audiences, the most convenient areas to hold in-person meetings for particular audiences, and the types of leadership training required by different geographic zones.

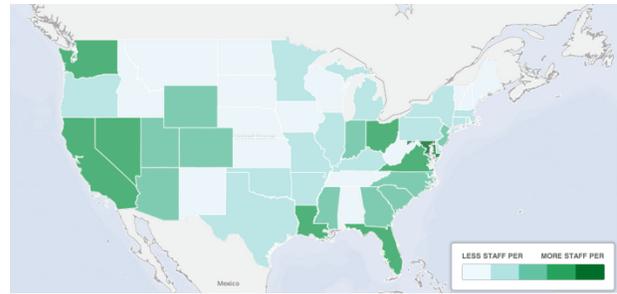
We analyzed the national distribution of public and academic libraries on three levels: libraries per state, library staff per state, and staff per library per state. Two trends emerged:

1. The states south of the Ohio River and west of the Mississippi River have fewer libraries and higher rates of staffing per library. This suggests that services are concentrated within fewer but larger libraries. It also may suggest that *internal* management and leadership training may take on greater importance in these larger institutional environments (see [Map 1](#)).
2. The states with the highest number of libraries (Illinois, New York, and Texas) have relatively lower staffing rates. This suggests those areas may have greater opportunity and need to collaborate with other organizations. This may suggest a concordant need for *external*, cross-institutional leadership training (see [Map 2](#)).

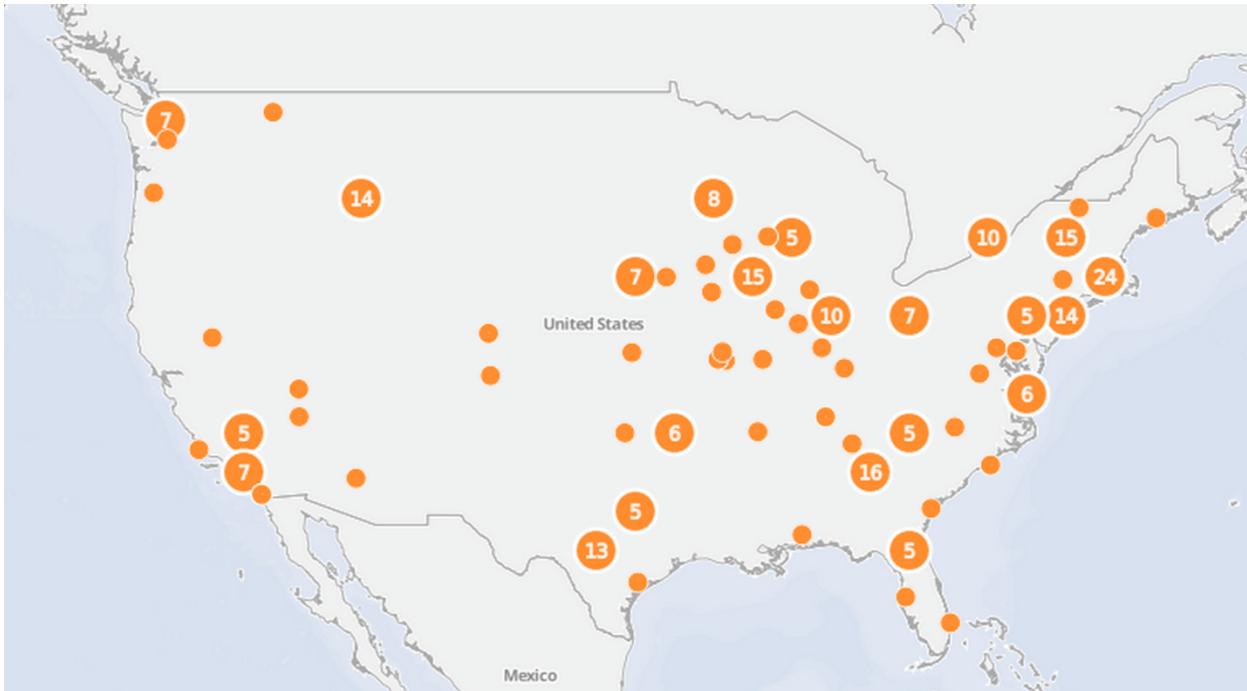
Leadership program data (see [Map 3](#)) mirrors the general trend of library distribution, with a high density of programs in the corridor from Minnesota and Iowa through the Northeast, fewer programs in the Southeast, and activity in the West concentrated in Washington, California, and Texas. Taking a deeper analysis of the types of programs, most operate on one of two geographic scopes: regional or national. The strong system of professional organizations within the library communities contributes heavily to this dichotomy. State and regional library associations organize or sponsor most of the regional events; national library associations likewise organize or sponsor most of the national events.



Map 1. Libraries per state



Map 2. Staff per library by state



Map 3. Clustered view of library leadership programs.

There are nine programs with state-based application requirements. Of these, all nine accept applications from every library sector. Eight of these nine state-based programs also target multiple or all career stages. This suggests a strong correlation between the state programs and the “general library” audience. Many state leadership programs are sponsored by state library associations (e.g., Michigan Library Association, Texas Library Association) and membership in those organizations is based on geographic proximity instead of such factors as library sector or career stage.²⁸ These programs are in many cases the only local source of training available in the area. As such, they likely attempt to appeal to as many of their constituent members as possible.

Regional programs (as distinct from state programs) occur when geographical characteristics encourage cross-state collaborations. Like the state-based programs, regional leadership programs sponsored by regional associations tend to reach out to their memberships, which often span library sectors and career stages.

²⁸ The full extent of this correlation is unclear, since application restrictions were not available for more than half of the programs in the dataset.

Programs serving a national audience, by contrast, typically align with very specific populations. Examples of these targeted populations include:

- *Underrepresented Demographics* – Leadership and Career Development Program (LCDP), Minnesota Institute for Early Career Librarians from Underrepresented Groups, Women's Leadership Institute, and Tribal College Librarians Professional Development Institute.
- *Senior Management* – ACRL/Harvard Leadership Institute for Academic Libraries, Leadership Fellows Program, Frye Leadership Institute, Leading Change Institute, UCLA Senior Fellows Program, Snezek Library Leadership Institute.
- *Sectors* – SLA Leadership Summit, Archives Leadership Institute, NLM/AAHSL Leadership Fellows Program, MLA continuing education workshops, and PLA Leadership Academy.

Many of these programs that are geared towards a national audience have developed five strategies in response to the increased administrative and travel costs of their geographic scope.

1. *Conference attachment*: Programs often are held in conjunction with existing conferences for three reasons:
 - a. Attendees may have already budgeted to attend the conference, negating additional travel costs.
 - b. Programs can expand the networking opportunities for attendees by introducing them to recognized leaders attending the conference.
 - c. Attendees are not continuously discriminated against based on their location since conferences typically take a circuit between major U.S. cities.

The relationship with a conference may take several forms. For instance, the continuing education programs held in conjunction with annual ALA conferences have included at least one leadership program every year since 2005. Fellowships, like the ARL Leadership Fellows Program, often host meetings at conferences the attendees regularly attend. Finally, some specialized groups have dedicated leadership conferences such as the SLA Leadership Summit for special libraries and the Snezek Library Leadership Institute for Christian academic libraries.

2. *Transit hub*: Programs are often based near a large city such as Washington DC, Chicago, Boston, and Los Angeles. Many of these are proximate to the headquarters of the organizing institution: CLIR, ARL, and NLM in Washington DC; PLA and ALA in Chicago; Harvard in Boston; and UCLA in Los Angeles. These cities are also host to a number of other nationally recognized libraries, increasing options and reducing the cost of site visits and guest speakers.
3. *Retreat*: Contrastingly, some programs will reinforce the intensity of the curriculum by isolating participants in a more remote environment. The Archives Leadership Institute takes place at Luther College in Decorah, Iowa, approximately two hours away from most major airports. It creates an atmosphere that concentrates on building networks of support between the attendees and their mentors, who come from the program's previous cohort.
4. *Virtual*: Programs can nullify all travel costs by hosting part or all of the curriculum virtually. The Library Leadership and Management Association of the ALA began hosting and developing virtual workshops in 2010. The Gates Foundation-funded INELI program pairs mentors and attendees internationally. The primary learning environment in these and other examples is virtual.
5. *Subsidized Funding*: Participants are funded by the program, either entirely or in part, to enable their attendance.

Case Study

Archives Leadership Institute (ALI)

Total Attendance: 128
 Years Run: Annually since 2008
 Program Duration: 7 days
 Cost: \$500
 Target Audience: Mid-career archivist with leadership potential

The ALI was originally hosted at the University of Wisconsin Madison campus, before moving to Luther College in Decorah, Iowa in 2013. As one of the few programs to target archives in particular, the ALI has made networking a core component of its program. After a week of training on-site, attendees are not only encouraged to complete year-long practicums, but to attend a workshop held in conjunction with the annual Society of American Archivists conference, join alumni from other years to complete thematic group projects, and to keep in touch via the ALI Salon hosted on the program web site. Alumni play an increasingly large role in planning future institutes as members of the program steering committee.

Geography can provide an important lens that can inform funding and program planning activities. However, the maps produced from our dataset are intended largely to raise questions, not answer them. When properly contextualized, these maps can provide meaningful information, e.g., how program density lines up with library density nationwide, or how geographic mappings of both program density and overall librarian density match up within each sector.

3.4 Sectors and Audiences

Evaluation of programs by sector provides a lens into what types of programs serve which sector-based audiences, and it allows us to look for commonalities and distinctions across the spectrum of sectors. For the purposes of analysis, the research team developed a taxonomy of five categories: *Academic, Special, Public, Archive, and General*.

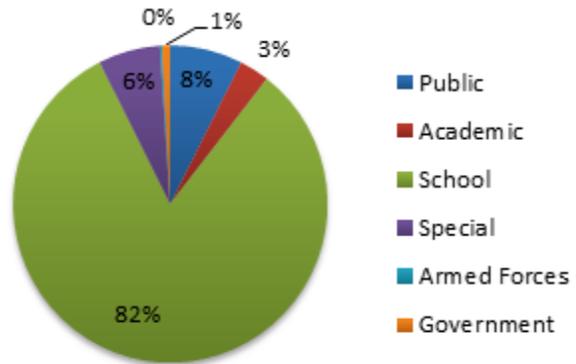
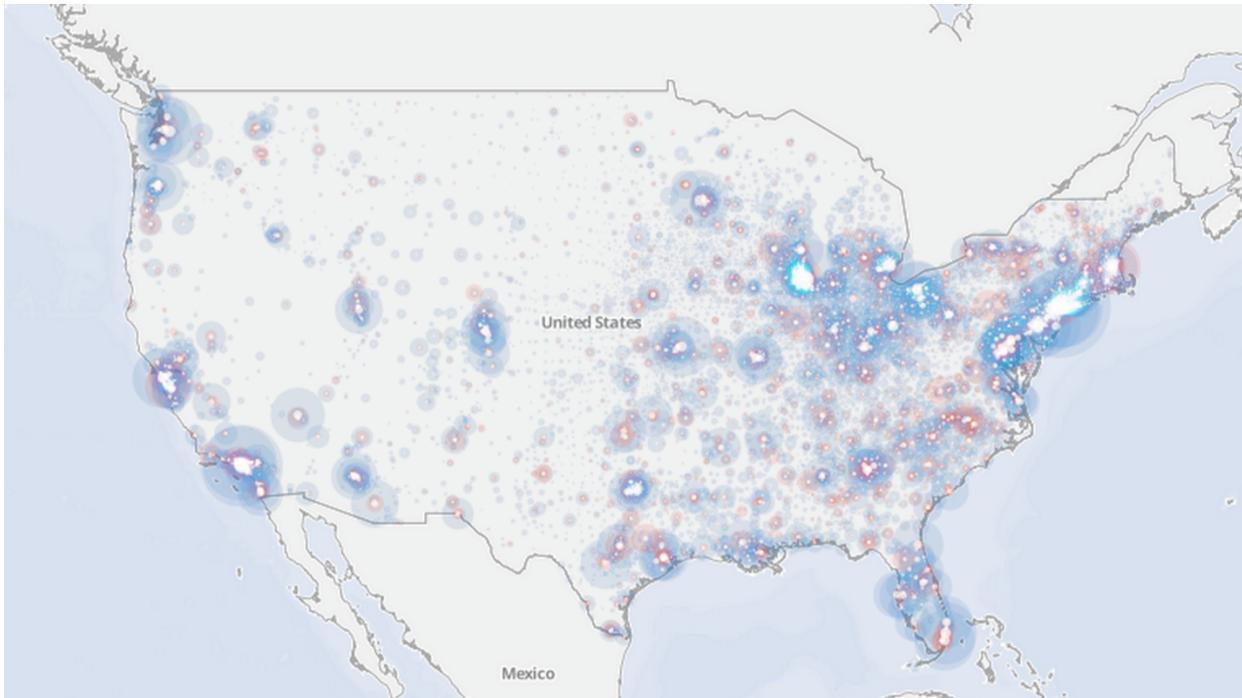


Figure 3. U.S. Libraries by Sector

As of 2013, there are approximately 119,987 U.S. libraries. American Library Association breaks these into six standard sector categories—public, academic, school, special, armed forces, and government—as represented by Figure 3.

The largest category of libraries in the country is school libraries, with more than 98,000, or 82%. These are smaller libraries on the whole, staffed lightly and responsible to K-12 public, private, and BIA (Bureau of Indian Affairs) schools.

Public libraries comprise 8,951 libraries (8%) in the U.S., and include a broad range of rural and urban, small and large, lightly and heavily staffed libraries. Special libraries, which include private, medical, law, and other topically specialized entities, account for another 7,616, or 6%. Academic libraries account for



Map 4. Distribution of academic (red) and public (blue) libraries weighted by FTE

3,689 college, university, and research libraries, or 3% of all U.S. libraries. Finally, government libraries comprise 1,006 of all U.S. libraries, or 1%. Employment density is heaviest in the public and academic libraries, which tend to be larger infrastructures with larger staffing numbers.

It is perhaps not surprising to see that *school library* as a sector only appeared once in our dataset, as the staffing levels and administrative levels of school libraries are much lower than those in other sectors, which impacts the needs and demands for leadership training in this field. Likewise, it is not surprising to see that *general library* training opportunities, or those that are open to any librarian from any library sector, are by far the most popular program type across three of the four program types: residential, fellowship, and virtual. These open, usually non-competitive, leadership programs are inclusive by design.

Of more interest is our finding that the majority of specialized (non-generalized) programs addressed academic libraries (14 programs), while fewer focused on public libraries (7 programs) and specialized libraries (7 programs). There is discord between those findings and the number of each type of library in the U.S.—namely, that public (8%) and special libraries (6%) far outnumber academic libraries (3%) (see [Map 4](#) for the distribution of academic versus public libraries). On the surface, the findings suggest that a much larger number of programs are offered to a smaller audience—academic libraries—and a smaller number of programs are offered to a larger audience: public libraries and special libraries.²⁹ However,

²⁹ Notably, ARL’s early and strong involvement in leadership training through the Office of Management Studies (later the Office of Leadership and Management Services) may help to explain the disproportionate attention to and investment in leadership training in the academic sector. Alternately,

the density of employees between public and academic libraries is strikingly similar, as evidenced by *Map 4*. This suggests that the current number of specialized programs offered to each audience may be less unbalanced than first suspected, though it does still concentrate more heavily on academic librarianship.

This finding is compounded when we analyze the program *type* by sector, as demonstrated in *Figure 4*. A larger number of the longer, in-person experiences—residential and fellowships—are geared toward the academic library audience. By contrast, nearly all of the special library offerings are workshop based.

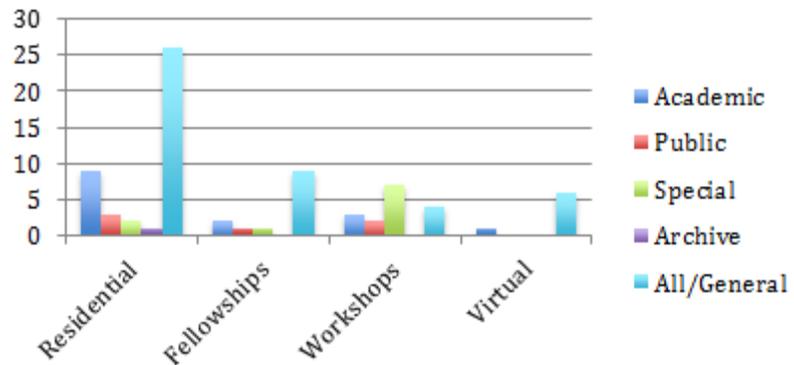


Figure 4. Library Programs by Sector and Type

The quantitative analysis does not demonstrate statistically significant findings, and it certainly does not tell a full story regarding what forces are at play here. However, it does suggest the need for deeper qualitative analysis in this area in order to understand the differences across sectors—are they due to the demands of the different sector-based library positions? Are they tied more closely to the number of employees, rather than the number of libraries, in each sector? Are they closely related to the funding agencies and host organizations that can support these initiatives? As we will see in the next section, this last question resonates with other findings from our initial analysis of library leadership training.

3.5 Funding and Costs

Host organizations, funding streams, and costs to attendees for library leadership training vary greatly across the data set, but analysis makes visible a number of meaningful trends.

3.5.1 Host Organizations

State library associations, often in conjunction with a state library or archive, are the most prolific sponsors of residential (often four- to five-day) programs. They also tend to target these programs at the widest range of sectors and career stages possible. This residential style of leadership training often follows roughly the Snowbird Institute model (which was itself based on leadership training models used in other fields). These state-based programs have framed their work in terms of their states' needs, and as previously discussed, they have focused on member-based or general audiences.

Newer experiments in state-based programs modify or break away from this model, with several following a fellowship model (characterized by longer-term programs with multiple short in-person sessions). For instance, Georgia's PINNACLE program features monthly meetings over a nine-month period, the ILEAD U program includes nine-month *team* projects designed to encourage sustained

non-academic communities may have access to internal leadership development programs (e.g., at the county level for public libraries) that are not visibly documented.

interactions, and the Virginia Library Leadership Academy uses intensive two-day retreats coupled with a long-term project for each participant.

National library associations are also responsible for a large number of residential (8) and fellowship (5) programs. These include some of the longest-lived programs, such as the Association of Research Libraries’ Leadership and Career Development Program (LCDP), the ARL Leadership Fellows Program (RLLF), the National Library of Medicine and Association of Academic Health Sciences Libraries (NLM/AAHSL) Leadership Fellows Program, and the Council on Library and Information Resources/Woodruff Foundation/EDUCAUSE-hosted Frye Institute (and the new Leading Change Institute).

While most leadership programs to date have been hosted by state or national professional organizations, those targeted at specific demographics or subsets of the population often take very different shapes. For instance, the Minnesota Institute for Early Career Librarians from Underrepresented Groups, Tribal College Librarians Professional Development Institute, and the UCLA Senior Fellows Program are all based on university campuses. The medical library and special library communities supplement general programs with continuing education classes and an annual symposium respectively.

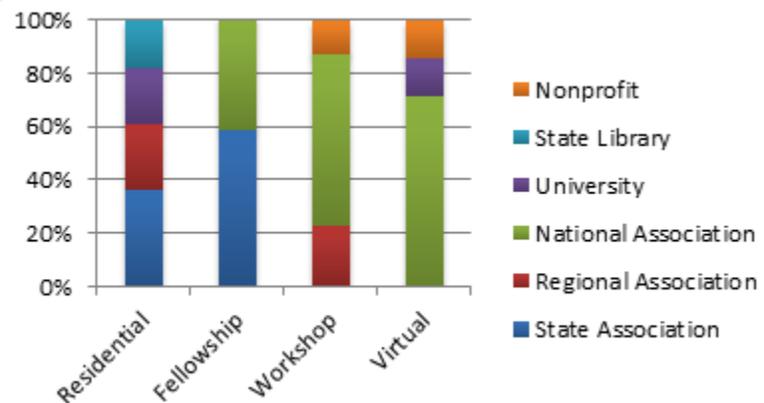


Figure 5. Library Leadership Hosts and Program Types

Additional trends can be seen through closer analysis of hosts and program types. Note there are dual hosts for a number of programs, thus the totals below are the total hosts, not the total programs (see Figure 5):

- Residential program host organizations cover the broadest range, including state library associations (12/43, or 28%), regional library associations (8/43, or 19%), national library associations (10/43, or 23%), universities (7/43, or 16%), and state libraries (6/43, or 14%).
- Fellowship host organizations tend to be state-based associations (7/13, or 54%) or national library associations/consortia (5/13, or 46%).
- Workshop host organizations are largely national associations (4/6, or 67%) with one university (1/6, or 17%) and one non-profit library group (1/6, or 17%).
- Virtual host organizations are largely national associations (5/7, or 72%) with one non-profit library group (1/7, or 14%) and one university (1/7, or 14%).

3.5.2 Funding Sources

Because not all programs list their funders in public websites or articles and reports, we have incomplete data regarding funding sources. We expect that additional programs in the dataset have been subsidized by funders. Even with this caveat noted, though, we see that a large number of programs are funded by one or more funding sources. Some programs listed dual funders; the totals below represent total funders, not total programs.³⁰

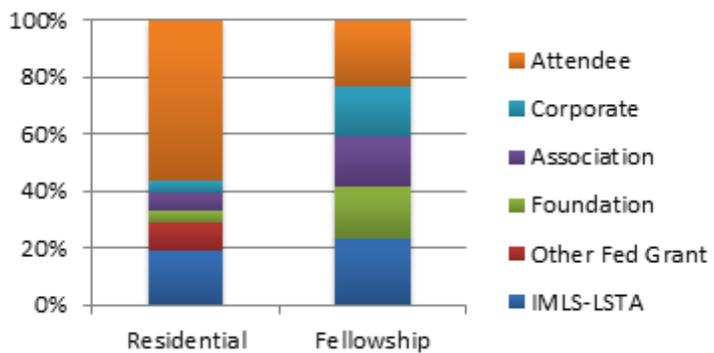


Figure 6. Funders by Program Type

For those programs that reported this information, we noted the following (see [Figure 6](#)):

- *Residential programs* most often are funded by institution/attendee investments (27/39), grant funding (IMLS LSTA: 9/39; IMLS: 6/39; foundations: (6/39); NHPRC: 1/39, ILAF: 1/39), state library associations (4/39), national library associations/consortia (3/39), state libraries (2/39), corporate sponsors (2/39), and donations (1/39).
- *Fellowship funding* sources most often include grant funding (IMLS-LSTA: 4/13; foundations: 3/13), association investment (3/13), corporate sponsors (3/13), and institution/attendee investments (4/13). In a few cases, there are dual investors (e.g., ALA/LAMA/World Book sponsorship of the “Leaders of the Pack” program, 2004-2006).
- Funding sources are unknown for workshops and virtual programs. Presumably, these may be run by their organizational hosts on a cost-recovery basis.

3.5.3 Costs

Costs to participants fluctuate significantly across the available options, perhaps largely due to grants, corporate sponsorships, and other resources that have supported some of these programs over time. The costs represented here are the program tuition costs; they do not typically account for travel and incidentals associated with participation. The general known breakdown of tuition costs is as follows:

- The average cost of residential programs to attendees is \$1,300, and they range from \$0 to \$5,000. Three of these 39 programs operate at no charge to attendees.
- The average cost of fellowship programs to attendees is \$1,400, and they range from \$0 to \$12,000. Five of these thirteen programs operate at no charge to attendees.
- The average cost to workshop attendees is unknown, as only one program in our dataset listed pricing (\$200).

³⁰The large percentage of programs that are subsidized by grants and external funding raises questions about the impact that such funding may have on the development of leadership training itself. Subsidies can weaken the perception of value within the community, e.g., ultimately making programs that are not grant-funded seem overpriced, when in reality, they reflect the actual cost of hosting the program.

- The average cost of virtual programs is unknown, though two programs in our dataset listed pricing (minimum \$25; maximum \$200).

3.6 Founders and Facilitators

There are common themes uniting many of the leadership programs, and one powerful source of this continuity is the overlapping participation of founders, consultants, and instructors/facilitators across the programs.

Several figures and groups appear repeatedly across programs, perhaps most notably Schreiber Shannon Associates, Maureen Sullivan, Kathryn Deiss, and DeEtta Jones. Their long-term association with leadership programs gives them unparalleled influence in the space. It also creates a legacy effect, whereby the experiences and insights these designers and faculty members have gained over time impacts the designs of the programs in which they are involved. Notably, three of these core designer-facilitators (Sullivan, Deiss, and Jones) engaged in the development and design of programs at ARL under Duane Webster, who ran the Office of Management Studies (later the Office of Leadership and Management Services).

Schreiber Shannon Associates have been involved in at least eight leadership programs. This group helped found the Snowbird Leadership Institute, an annual five-day program that ran from 1990 until 1998. After the conclusion of Snowbird, Schreiber Shannon Associates established similar programs in a number of states including: Eureka! Leadership Program, Library Leadership Ohio, New Mexico Library Leadership Institute, and Nebraska Library Institute.

Maureen Sullivan has also been involved in a variety of leadership programs (at least thirteen identified in this dataset). As ACRL President in 1998 she helped found the ACRL/Harvard Leadership Institute for Academic Libraries. As ALA's President (2012-2013), she developed the ALA Leading to the Future Institute. She has also been involved with Michigan Library Association Leadership Academy, Mountain Plains Library Association Leadership Institute, New Jersey Academy of Library Leadership, Iowa Library Association Leadership Institute, TALL Texans, YSLead Massachusetts, Leadership and Emotional Intelligence at MLA, Southeastern Institute for Collaborative Library Leadership, and Library Leadership Massachusetts Institute.

Two additional voices—Kathryn Deiss and DeEtta Jones—have served as designers, faculty, and consultants on numerous initiatives. Deiss has been involved in the ALA Leading to the Future Institute, the ARL Leadership and Career Development Program (LCDP), and the NLM/AASL Leadership Fellows Program; Jones has been involved in programs including the Sunshine State Leadership Institute and the Minnesota Institute for Early Career Librarians for Early Career Librarians. Jones has licensed all of the ARL OLMS Institutes (three- to four-day immersive experiences) from ARL and is now working with other

designers to provide these on demand to libraries around the country through DeEtta Jones & Associates.³¹

These groups and individuals have collaborated on some occasions, overlapping directly on such programs as Library Leadership Massachusetts Institute (Schreiber and Shannon, Sullivan); the ALA Leading to the Future Institute (Deiss, Sullivan); Minnesota Institute for Early Career Librarians from Underrepresented Groups (Deiss, Jones), and the ALA Emerging Leaders program (Deiss, Sullivan).

The impact of these and other legacy voices on the features, format, curriculum, and overall aims of library leadership development are still relatively unknown; in the third phase of our project research, we will be talking to these and other leaders-of-leadership-development to better analyze this component.

3.7 Evaluation Methodologies

Although the vast majority of library leadership programs cite some level of (usually positive) reviews, both anecdotal and intentionally gathered, few have produced concrete assessments of how well they met their goals or what long-term impact they may have had. Even published reports and reviews of these programs focus primarily on the curriculum, personal attendee experiences, and the philosophies undergirding these efforts.

The lack of consistent methodologies and frameworks for assessing impact—on attendees, on their career pathways, on the libraries within which they work, and on the field-at-large—has been highlighted for more than a decade. As aptly noted by Florence Mason and Louella Wetherbee in 2004,

Unfortunately, participant overviews are of limited value in evaluating the efficacy of leadership training. These reviews do little to address the questions of whether the participants actually learned anything new, whether that learning is retained and applied in the workplace, and whether that knowledge or those skills improved the individual or improved workplace performance. (p 207-208)

Most programs that have deployed evaluation have done so using self-assessments of attendees (sometimes extending also to self-assessments of mentors and attendee assessments by supervisors). These focus primarily on whether training met their expectations and whether they considered their experience successful. While such evaluations may provide effective measures of participant satisfaction, they largely fail to produce evidence of the return on investment in terms of both the participants' own career pathways *and* the impact these participants have on their local environments after their leadership training.

Common features across the more rigorous program evaluations accessed by the research team included the following:

³¹ These consulting arrangements were not tracked in our dataset because concrete information is not available through web-based or published materials.

1. *Mixed methods approaches*: Engaging in surveys and focus groups and interviews, for example, provides triangulation between different forms of communication and helps to surface important details that might be missed if only one method was deployed.
2. *Measures of both satisfaction and actual change*: These are two very different assessments of programmatic success, and both need to be collected in order to judge program impact on the individual and the profession. The first can be ascertained through questions regarding what the participants liked (and did not like) about the program and what value they ultimately gained on a personal level. The second can be measured through questions regarding behavioral changes.³²
3. *Quantitative data on leadership accomplishments*: For example, programs have asked participants about their involvement in library association committees and boards, the research projects they have undertaken, and the career advances they have experienced. They have also asked attendees what effect the training had upon these activities.

Currently lacking in most studies is a comparison between the attendee/mentor/trainer/supervisor groups and a control group. Such control groups have been difficult to establish, and in the few instances where they have been deployed, the findings demonstrated that the control group outperformed the leadership training attendees, perhaps due to research design. As more evaluations are performed, perhaps this component can be refined to demonstrate changes in behavior between those who participated in training and those who did not.

Also currently lacking is any comparison across the offerings within the field. Such comparisons are common in most educational environments, where accreditation and rank metrics help to determine which programs excel on which specialties. Cross-comparison in leadership training is currently difficult because the programs differ significantly, to the degree that such comparison could become an “apples to oranges” exercise. However, as leadership training continues to mature, the field needs mechanisms through which hosts and funders can better establish the methods and approaches that best suit different audiences.

Case Study *Synergy Evaluation (2007)*

Some programs have documented ways to surface more powerful evidence of the impact a program has had both *on and beyond* the librarians who attend. The Synergy program of the Illinois Library Leadership Initiative, for example, employed external evaluators to design and implement surveys and focus groups with attendees from seven years of trainings, along with designers/facilitators, mentors involved in the program (where applicable), and the attendees’ local supervisors. What set this study apart from others is not just the communities canvassed, but the rigor with which it was conducted and reported, and its focus on behavioral changes, not just attitude or belief-based changes. With a large pool of respondents, this study was able to demonstrate statistically significant results and cross-compare among different variables and factors to better interpret findings. The Synergy assessment was a pivotal component in the launch of additional program offerings (e.g., ILead U).

³² For example, the Synergy study (Illinois Library Leadership Initiative) included in its survey for participants a series of confidence ratings around a variety of leadership tasks in which they had been trained at Synergy and questions regarding their use of specific leadership techniques.

*Case Study**AAHSL Leadership Fellows Program (2005)*

Published Report: Carolyn E. Lipscomb, Elaine R. Martin, and Wayne J. Peay, “Building the Next Generation of Leaders: The NLM/AAHSL Leadership Fellows Program” (2009)

A 2005 review of the program was conducted by consultants from University of Massachusetts Medical School and was later published in 2009. It was intended to assess the program’s effectiveness through qualitative data capture and analysis and to provide recommendations for the program’s future development. The consultants engaged in a mixed methods study that included focus groups, online surveys, and interviews (each with fellows, mentors, and home supervisors). The intent was to conduct a “process evaluation” rather than outcomes-based evaluation: in essence, measuring how individuals felt about their leadership training experience as an intervention. The evaluation findings included mostly qualitative data regarding intangible results, e.g., “the development of the individual (individualization) occurred for both mentors and fellows.” (p. 864). The report also identified a few tangible findings beyond the study regarding career development of graduates, reporting in the conclusion that of 35 graduates between 2002-2009, 13 have become directors, eight more have been promoted to higher responsibility, and 14 (presumably) have not yet changed positions.

*Case Study**Eureka! Evaluation*

In 2013, InfoPeople released a report regarding an assessment of the Eureka! Program that was conducted by external consultants from Social Data Insights, Inc. The evaluation was intended to identify the program’s impact on Fellows, their libraries, and their communities. It also sought to identify program strengths and weaknesses to aid its refinement process. SDI used a mixed methods approach consisting of surveys, interviews, and one focus group, and they involved as participants the attendees, mentors, facilitators, and home supervisors. They found an increase in attendees’ confidence and leadership skills; they also found that approximately half of the “observers” report seeing the attendees’ participation leads to a positive impact on other library staff and on the library and patrons.

4 Recommendations

As documented herein, there have been many efforts over the last two decades to train library leaders. The models for these programs have varied significantly, and the outcomes of these training efforts are still relatively unknown.

To date, any consistency that exists in curriculum development and evaluation practices across these leadership-training programs has evolved not through strategic design, but rather through the personal influence of key players who have designed and facilitated multiple programs across more than a decade. Such influence is valuable, but it depends upon loose connections rather than stable networks or publications or other communication channels. Although some individual training programs have documented their work through white papers and articles, there is a relative lack of comparison-based documentation regarding the breadth and depth of this existing spectrum of leadership training activities.

Given the increasing maturity of library leadership offerings after several decades of experimentation, establishing better communication and information exchange between programs might help to refine our overall understandings of what types of programs work best for what career moments, sectors, and geographic regions.

Specific recommendations that have emerged from this research project to date include the following:

- *Encourage consistent naming practices.* Currently, leadership program naming is not standardized around any known conventions. Each name can mean a variety of things (e.g., Institute, Fellowship, Program, Seminar, Network, Academy, Symposium, Summit, etc.). As these offerings continue to mature, the field would benefit from meaningful and shared vocabularies that ensure prospective participant and funder understanding of these programs.
- *Define competencies.* To date, there has been a lack of field-wide, agreed upon leadership competencies by which success of programs can be reliably measured. Core competencies serve as the conceptual framing for leadership program development in many other (non-library) environments (see e.g., the Center for Creative Leadership). Once identified, competencies can be used to clarify the particular skills and outcomes a training experience will deliver. They can be used to promote consistency between programs around shared competencies; they can also be used to differentiate programs around distinct competencies.³³
- *Evaluation methods.* Once core competencies have been defined and integrated into library leadership training programmatic designs, they can provide a set of focal points for evaluations, both short-term and longitudinal. To the degree that the competencies are shared across a field, the evaluation methodologies also can be shared, while being refined appropriately for specific programmatic measures.
- *Funding studies.* Understanding the degree of federal and foundation funding that currently enables library leadership training opportunities is crucial if we are to create sustainable programs. Such studies could also demonstrate how funding differences between sectors might impact the growth and development of library leadership training for particular groups. Understanding the role that sponsored and external funding plays today can help us plan for sustainable business models to support these programs in the future.
- *Loosely define a vertical curriculum pathway.* This curriculum could begin in graduate school and then continue through early-career, mid-career, and senior administrative offerings. Graduate school offerings and early career offerings could be more focused on inward growth and the development of the crucial networks and leadership strategies that will encourage and support budding leaders. Mid-career and senior-level training might focus on other elements, e.g. deployment of tools (SWOT, strategic planning) and exposure to organizational contexts, political issues, and other relevant topics.
- *Differentiate between general and specialized experiences.* Further research could establish how general library v. sector-based experiences function and what needs each best meets. For example, it may make sense to explicitly concentrate “general” experiences towards early

³³ One notable work by WebJunction (newest edition, released March 2014) that begins to meet this need is the “Competency Index for the Library Field.” This comprehensive compilation built upon many competency indices within the library field. It includes a section on Organizational Leadership (p. 30-31).

career audiences, and focus more sector-specific experiences among the mid-career and senior administrator audiences. It might also be helpful to have some “bridge” offerings that help to expose mid- and senior-administrators across sectors as a part of their training experiences.

- *Determine how many leaders we need to invest in training.* Some have critiqued leadership training by saying “how many is enough?”, a fair question given that some programs have trained more leaders than their field has positions for them to fill. Establishing concrete end goals for bounded time periods would help to ensure that our needs and training offerings are clearly documented and understood.

4.1 Leadership Network Building

The current lack of coordination across programs and across sectors may represent a significant opportunity to enrich our leadership training environment, field-wide, by providing a nexus between these groups to improve our capacity to create shared direction, alignment, and commitment in service of a higher vision for the field of libraries—one that will help us sustain our work in this critical moment. After all, in a networked world, the leadership advantage often goes to people and groups who can work across sectors and locations with ease. Integrating disparate pieces of information and groups of people is an imperative 21st-century leadership skill.

Research on leadership has demonstrated the critical need for spanning boundaries—organizational and sector-based—to encourage strong, visionary leadership to emerge. As one example, a decade of research conducted across 12 countries and six world regions by the Center for Creative Leadership showed that most of the important challenges business leaders face today are interdependent in nature. These challenges can be solved only by collaborating across boundaries.³⁴

This emphasis on spanning boundaries closely mirrors IMLS’s finding that collaboration and facilitated partnerships across memory institutions “can dramatically enhance outcomes and organizational change for services provided to the public.”³⁵ It also concurs with the library field’s decades-long cyberinfrastructure conversations, including numerous publications calling for increased collaboration across the library community.³⁶ It is widely understood that digital infrastructures cannot work effectively if they are built as silos; collaborative efforts are required to build lasting technical channels. However, most of the work in libraries—digital and non-digital—continues to take place in bounded space, defined by the institution and its affiliated “type,” academic or public, archival or special.

This is not to suggest that leadership training should not have sector-specific capacities. Indeed, such programs as the Peabody Institute (Vanderbilt), the NLM/AAHSL Leadership Fellows Program, and other “in depth” opportunities provide attendees with valuable exposure to the organizational cultures and characteristics of particular institutional forms (e.g., academic libraries or health sciences libraries),

³⁴ Chris Ernst and Donna Chrobot-Mason (2011). *Boundary Spanning Leadership*.

³⁵ IMLS, Strategic Plan 2012-2016. p 9.

³⁶ See for example the Cyberinfrastructure reports for the sciences and the humanities and social sciences, the Blue Ribbon Task Force reports, and the *New Roles for New Times* ARL report series as just a few among many examples.

including the perspectives and expectations the parent institution brings regarding the role and performance of the library dean or director.

There may be ways to enhance leadership training offerings by marking specific use cases and needs that are met by different designs. For example, one could imagine a strategic vertical alignment of offerings that more deliberately seeks to begin leadership training in graduate schools (SLIS, SILS, iSchools, etc.) with a focus on personal growth and understanding of different leadership styles. It might continue with programs geared at cross-sector audiences of librarians in the early part of their career trajectories, and train them in competencies that are needed in common across the sectors. Mid-career and Senior Administrators might have more sector-specific offerings, but also might have access to some cross-sector networks to cross-fertilize between these communities.

4.2 Fostering Nexus Points

As leadership experts Chris Ernst and Donna Chrobot-Mason wrote in 2011: “Where disparate groups collide, intersect, and link there is significant potential for a nexus to be created that unleashes limitless possibilities and inspiring results.”³⁷ These nexus points are crucial for providing unified vision across sectors to accomplish high-reaching goals.

These nexus points can also be difficult to engineer, in part because boundaries are meaningful mechanisms. They provide us with a coherent sense of identity and purpose. For much of our day-to-day work, boundaries are useful definitional constructs. However, when we bring multiple sectors together with effective facilitation to identify and work on specific, shared challenges, each group has the advantage of seeing its own familiar issues through unfamiliar lenses. Cross-germination across the related communities of a field can quickly free us from bounded thinking, helping us creatively meet our challenges. It can also equip us with a broadly shared vision and implementation strategy that can help to advance the field as a whole.

What new opportunities might we create if we begin to develop our field’s leadership training programs with deliberate cross-sector collaborations? How might we improve the library’s future outlook by uniting leaders from across library sectors to study and document their common challenges and determine how best to overcome those challenges field-wide? What will incentivize these leaders—who are busy with their own projects and communities—to work together to forge a lightweight-but-significant national approach to library leadership training and evaluation? And finally, could we improve this work further by involving top researchers in leadership training topics to facilitate and frame our own leadership training processes? Our next phase of project research is designed to answer these questions and lay the groundwork for better information exchange and coordination across leadership programs nationwide.

³⁷ As one example, a decade of research conducted across 12 countries and six world regions by the Center for Creative Leadership showed that most of the important challenges business leaders face today are interdependent in nature. These challenges can be solved only by collaborating across boundaries. Chris Ernst and Donna Chrobot-Mason (2011). *Boundary Spanning Leadership*.

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Appendix A: Codebook

Summary: This data was collected as part of an effort to survey the state of library leadership training in the United States between 1998 and 2013. Data was collected from websites, reports, articles, listservs, and surveys of leadership program hosts. Variables included program features, cost, facilitators, locations, and attendees.

Details

Extent: Two tables

Format: TSV

Date: 2014/03/31

Version: 1.0

Dataset components

Name	Purpose	Extent
codebook	Documenting the dataset	
programs	General descriptions of each program recorded	42 columns, 79 rows
year_to_year_locations	Location, dates, and attendance numbers for each program where possible.	10 columns, 318 rows

Fields

Field Name	Variable	Values or Explanation
programs		
completion	Tracking research state of a given program	Web - all web info available harvested emailed - survey emailed to program director survey results - survey response added
key_field	Program key for linking tables	4 digit integer
program_title	Most commonly used program title	Program name (abbreviation)
program_type	Classification of program type	Workshop - 1 day event Residential - Focus on 2-5 day-long school, can include optional longer project Fellowship - Meetings spread over longer period, 9 months to 3 years Virtual - Webinar only program Symposium - A conference style event with a focus on networking
description	Description of program harvested from promotional materials	

website	URL of program web site	Includes outdated/dead links; must use Internet Archive's Wayback Machine for these
organizational_lead	Organization(s) that ran the program	organization 1, subunit (abbreviation of smallest unit); organization 2
organizational_partners	Organization(s) that supported the program with resources or logistics	organization 1, subunit (abbreviation of smallest unit); organization 2
state_offered	Primary U.S. states where the program was hosted	state 1, state 2
lectures	Are lectures part of the program?	Binary
guest_speakers	Are guest speakers beyond the instructors part of the program?	Binary
case_studies	Are case studies of leadership scenarios part of the program?	Binary
field_trips	Does the class visit other institutions?	Binary
discussion	Must participants discuss leadership material?	Binary
projects	Must participants complete projects at their institutions?	Binary
mentors	Do participants have mentors during the program?	Binary
webinars	Are any lessons offered only online?	Binary
networking	Are participants explicitly encouraged to network?	Binary
sector	Type of memory institution	Academic - University libraries Public - Municipally funded libraries, including K-12 libraries Archives - Special collection libraries and archives Special - Industry or professional linked libraries Other - Category not listed above All - All
audience	Career stage of intended audience	Senior management - e.g. directors Mid-career - may or may not be manager, more than 5 years Early career - not managers, first 5 years All - any librarian at any career stage
restrictions	Further requirements for intended audience	Member Based - Attendee must be member of host organization State Based - Attendee must live in defined geographic area Minority Based - Attendee must be a member of targeted demographic
attendance	Total attendance	integer, total since 1998
attendance_complete	Is the attendance figure a lower	binary

	bound	
year_began	First year program was offered	yyyy, year of the first class
year_ended	Last year program was offered	yyyy, Ongoing - program has not ended
length_in_person	Number of days of in-person classes, mentoring, visits, etc	in days
length_total	Total number of days from start to completion	in days
funding_sources	Organizations that support the program financially	organization 1, subunit (abbreviation of smallest unit); organization 2
cost	Highest participant cost	in dollars
discount_cost	Most discounted participant cost	in dollars
discount_reason	Reasons for discount_cost if it exists	free text
student_evaluation	Method of incorporating program evaluations by students	free text
external_evaluation	Method of having a third party evaluate program	free text
contact_name	Current program director	name 1, name 2
founders_facilitators	People or groups that were influential in founding the program	name 1, name 2
key_players	Noting prolific library leadership program contributors	name 1, name 2
analysis_ignore	Whether program falls within project scope	Binary
year_to_year_locations		
key_field	Program key for linking tables	4 digit integer
location_city	City of specific instance of program	string
location_state	State of specific instance of program	string
start_year	Start year of specific instance of program	yyyy
start_month	Start month of specific instance of program	mm
start_day	Start day of specific instance of program	dd
end_year	End year of specific instance of program	yyyy
end_month	End month of specific instance of program	mm
end_day	End day of specific instance of program	dd
attendee_amount	Number of participants of specific instance of program	integer