

**Study of 21<sup>st</sup> Century Librarianship Initiatives**  
**Advisory Council**  
*Meeting Notes*  
September 26, 2002

**Present:** Tom Andersen, California State Library; Gregg Atkins, Sacramento City College; Nancy Crabbe, Santa Clara City Library; Linda Crowe, Peninsula Library System; Holly Hinman, Consultant; Les Kong, CSU San Bernardino; Carole Leita, Consultant (assisting Holly Hinman); Jane Light, San Jose Public Library; Mark Parker, Sacramento Public Library; Cecilia Riddle, Los Angeles Public Library; Heidi Sandstrom, UCLA Biomedical Library; Barbara Will, California State Library; Blanche Woolls, SLIS, San Jose State University

**Absent:** Deborah Barrow, Watsonville Public Library; Andrew Herkovic, Stanford University Library; Luis Herrera, Pasadena Public Library; Susan Kent, Los Angeles Public Library; Vicky Reed, San Diego County Office of Education; Joan Frye Williams, Consultant

***Results of Control Group Survey:***

Copies of the report from the control group survey had been distributed to Advisory Council members prior to the meeting. Holly Hinman reviewed the Executive Summary of the survey report and opened the meeting to discussion. Discussion points included the following:

- The term “leadership” was used a number of times in the survey (as in “leadership development,” “leadership training”), but was not defined. It would have been helpful to those taking the survey if the term had been defined.
- The survey focused on tangible evidence of change rather than on behavioral or perceptual changes. That is, the survey asked about job change or promotion, participation in professional and community associations, publication and speaking activities, etc. The survey did not ask if participants were happier with their jobs, felt that they were more effective as employees, or had a broader perspective. (Ed. note: the ETI pre- and post-Institute surveys did ask such questions, which is why they were not included in this survey.)
- People who attended the Institute in 2001 were surveyed only one year after the Institute, which might not have been sufficient time to see concrete behavioral change.

***Focus Groups:***

Holly Hinman distributed notes from and reviewed the discussion at the two focus groups with directors of the largest (Group 1, California Library Statistics Directory) public library systems. She noted that there were similarities but also considerable difference between the two groups. Both groups thought that continuing education is very important for their libraries. Both expressed

concerns about the nature of staffing in large library systems, where there is a long-term workforce, little turnover, and few opportunities to bring in new people. It is difficult to motivate “lifers” to invest themselves in continuing education. Restrictive civil service rules hamper efforts to energize and retool staff. Professionals in large libraries are less likely to get a broad range of different experiences; they tend to be specialized and isolated from management. In a large system, if just one person participates in training, the benefit of that training tends to get lost. Large systems need to train paraprofessionals in both practical skills and library philosophy and values.

In discussing leadership training, the groups identified characteristics of “leadership” as follows:

- Vision
- Charisma
- Awareness of and sensitivity to the broader community
- Seeing the forest instead of leaves
- Ability to communicate vision and values to others
- Setting the tone for an organization and its services
- Desire to make a difference
- Coaching and encouraging staff at the next level down

Qualifications for leadership include:

- Political sense, interest
- Strong work ethic
- High energy level
- Critical thinking skills
- Self confidence, comfort with oneself
- Ability to make decisions
- Ability to take risks
- Ability to stay the course, not cave in to pressure to abandon one’s professional judgment
- Ability to have ownership and responsibility for an issue or project without being ego involved – ability to step back and redirect without feeling a personal failure
- Willingness to be mobile, to plan one’s career strategically

There was a general recognition that leadership training is difficult and expensive, but also that “if you’re going to do it, do it right – invest the necessary money.” The northern California focus group identified the following essentials for leadership training:

- Quality experience, atmosphere, environment
- Big picture perspective
- On-site for at least 3 days
- Bring people from different organizations together to form peer groups
- Allow unstructured networking time
- Provide support for risk taking
- Invite highest quality, outside speakers

- Concrete follow-up plan to translate training into action

Both groups were also very interested in the role of mentoring in producing leaders.

Both groups thought that the Stanford-California State Library Institute on 21<sup>st</sup> Century Librarianship had some excellent qualities but needs modifications if it is to continue. Suggested modifications include:

- Make it an event, not an institution
- Reduce the number of attendees
- Could be less frequent than annual
- Reduce time to 3-5 days
- Do not hold over a weekend
- Use a conference center rather than a college, because experienced support staff would be available
- Do not include out of state participants

The northern group expressed willingness to pay more of the actual cost of participation. There was support within the southern group for leadership training that would consist of a series of events held over time and in multiple locations throughout the state.

In terms of the State Library role, the northern group definitely thought that leadership training is a statewide issue/responsibility – individual libraries cannot provide it. They also thought that an Institute-style event is the most promising approach. The southern group was more supportive of the distribution of funding on a per capita basis.

Ensuing Advisory Council discussion included the following points:

- The issue of identifying training opportunities continues to come up, as it has for decades. Opinion is divided on the usefulness of this activity, how it should be done, or who should do it.
- The State Library needs to continue to look at ways to target and deliver leadership training.
- There is support for a leadership track, with sponsored speakers, as part of the CLA conference.
- ALA is looking into the possibility of offering a training program for “certification” of library managers. At this point, they are just doing market research.
- The whole issue of CEUs was discussed at some length. CEUs are not an issue for public librarians. School librarians are interested until they reach the maximum in pay benefits. Some academic librarians find them useful for tenure. Stanford Institute participants had the option of paying extra for CEUs, and approximately 20% did so.

### ***Telephone Interviews:***

Holly Hinman next reviewed a report summarizing the results of telephone interviews conducted with thirty public library directors (Group 2, California

Library Statistics Directory). All thirty directors were asked the same questions and were given an opportunity to make additional comments.

The directors were given a list of five areas identified by various needs assessments as Continuing Education priorities statewide, and were asked to tell the consultants whether their library would be likely to invest in training, might invest in training, or unlikely to invest in training.

The areas are:

- Leadership development
  - 19 libraries said they would be likely to invest in training in this area
  - 1 said they would be likely if the training were tailored to libraries
  - 6 said they might invest in training in this area
  - 4 said they would be unlikely to invest

Almost all directors mentioned that their local jurisdictions (city, county) sponsor initiatives in this area – lots of “leadership academy” programs.

- Management/supervisory skills
  - 23 would be likely to invest
  - 2 might invest
  - 5 would be unlikely to invest

All of the jurisdictions surveyed offer or contract for some kind of management/supervisory training for city/county staff. The libraries are, however, interested in training in this area that is tailored to library needs.

- Technology
  - 24 would be likely to invest
  - 4 might invest
  - 2 would be unlikely to invest

Most directors cited their local city/county as the primary source for basic technology training, and Infopeople as their primary source for keeping up with new technology and trends.

- Library skills (e.g., reference interview, cataloging fundamentals, children’s services)
  - 1 library said they would be “very likely” to invest
  - 16 would be likely
  - 10 might invest
  - 3 would be unlikely

Many directors mentioned that for this area they rely heavily on training provided by their local cooperative systems. Two areas are important – basic skills for non-MLS staff and refresher/update skills for professionals.

- Customer service/professional development (e.g., time management, presentation skills, conflict resolution)
  - 18 would be likely to invest
  - 2 would be likely to invest if the training is tailored to libraries
  - 8 might invest
  - 2 would be unlikely to invest

Directors were asked to indicate whether they think it is a high, medium, or low priority for the State Library to invest in training in each of the same five areas:

- Leadership development
  - 20 thought this was a high priority
  - 6 gave it medium priority
  - 4 gave it low priority

Many directors linked the need for leadership training to the issue of succession planning, and the need for future library directors.

- Management/supervisory skills
  - 7 considered this a high priority
  - 10 thought it was medium priority
  - 12 gave it a low priority rating

A number of directors mentioned that this is handled quite well locally.

- Technology
  - 24 ranked this as a high priority for State Library investment
  - 4 assigned it medium priority
  - 2 gave it low priority

Many directors suggested that the state's investment should be in new technology, cutting edge training, not in basics.

- Library skills (e.g., reference interview, cataloging fundamentals, children's services)
  - 17 gave this a high priority
  - 6 thought it medium priority
  - 7 thought it low priority

Directors specified paraprofessionals as the most important target group for this training.

- Customer service/professional development (e.g., time management, presentation skills, conflict resolution)
  - 14 thought this a high priority
  - 10 assigned it medium priority
  - 6 thought it low priority

The next question asked if the directors were familiar with the Stanford Institute, and all but one answered in the affirmative. The one director who was not familiar with the Institute had moved to California within the last year. Of the thirty libraries surveyed, thirteen had sent at least one person to the Institute and seventeen had not. The most frequently cited reasons for non-attendance were lack of interest (on the part of staff) and time constraints, either professional or personal. Other comments included: lacked time to complete the application; the library had too many other commitments; the local jurisdiction has a restrictive travel policy; the travel distance was too great; the curriculum was too academic.

Libraries that did have staff who participated in the Institute reported a range of outcomes, from “no real change” (4 libraries) to one that reported the two people who attended both have since won performance awards from the city. Outcomes mentioned by more than one library included: greater confidence, increased enthusiasm, broader perspective, greater initiative on projects. Two libraries complained that while Institute participants are doing very good work in the library, they still don’t want to become administrators, and one reported that the participant left almost immediately to take another job.

The directors were asked some questions about their own careers. Twelve said that they knew from the beginning of their library careers that they would become leaders in the profession. Nine said that they became leaders incrementally, as they worked to “keep improving things.” Ten said that they “never planned to become a leader, but just ended up here.” When asked about pivotal experiences or events that influenced their careers, the range of responses was equal to the number of respondents, and included everything from economic pressures to censorship issues. Twenty-two of the directors surveyed have participated in formal leadership development training. Many directors indicated that they had pursued leadership training opportunities on their own, after they were in the director’s job. Eighteen of the thirty directors reported that they had a mentor, although almost all of the mentoring described by the directors was informal – supervisors who took an interest and “encouraged me to talk things over with them.”

The directors were asked to rank a list of alternatives for leadership development as being of high interest, some interest, or little or no interest. The alternatives described were:

- Continue the Institute in a modified form.
  - 12 said this would be of high interest
  - 10 said this would be of some interest
  - 8 had little interest in this
  
- Provide scholarships for California librarians to attend other leadership programs.
  - 17 expressed high interest in this
  - 7 had some interest
  - 6 had little interest
  
- Provide an incentive for one of the library schools – or some other California educational institution – to develop a library leadership program.
  - 3 expressed high interest
  - 12 had some interest
  - 15 had little interest

Many directors expressed concern that quality would be an issue; they aren't confident that library schools would do a great job or provide the right skills/perspective.
  
- Contract with some agency, such as the CSU, that provides leadership training as a business.
  - 11 had high interest
  - 11 had some interest
  - 8 had little interest

Many directors cited benefit of participating in programs that include trainees from other disciplines – it's good to get more than just the library perspective.
  
- Provide leadership training as a series of shorter events that would be offered multiple times in multiple locations.
  - 1 library expressed “very high” interest
  - 19 expressed high interest in this approach
  - 7 had some interest
  - 3 had little interest

Several directors noted that this is how local jurisdictions handle leadership training – shorter segments spread over a year or so; students attend all of them and work on projects between times. Directors thought this option would be most attractive to staff, also. Many of the staff members who are potential leaders have family and other personal commitments that prevent them from getting away for a multi-day intensive event.

There was consensus among the directors that the target group for leadership training should be librarians with three to ten years of experience in the profession.

The number and range of additional comments were of great interest to the Advisory Council. The transcribed comments are included at the end of these minutes.

The telephone survey also revealed several local programs of note:

- Oakland PL is doing groundbreaking work developing training in the areas of racial and ethnic diversity/sensitivity.
- Santa Clara County is running its own in-house library leadership program, based on Snowbird. Julie Farnsworth is coordinating.
- The County of Monterey provides tuition reimbursement for all full time employees up to the limit of the IRS code.

The ensuing discussion included the following points:

- Library directors identified recruitment as the most critical public library need, yet San Jose is maxed out with 1200 students (it is now the largest MLS-granting program in the country), and UCLA is limited by UC governance to 60 in the Master's program. MCLS has an LSTA grant that is testing a program to provide stipends for public library internships. The State Library scholarship program is very popular and successful, and this year attracted more applications than ever before.
- In the future, the proportion of support staff to librarians will increase. The role of librarians will change to focus on project management, training, management of systems, etc. Librarians will spend less time "on the floor."
- The term "leadership" is applied to a whole range of skills and behaviors, from basic supervision to the visionary sorts of behavior that the Stanford Institute sought to foster. Infopeople can handle the technical training on budgeting, developing business plans, conducting needs assessments, etc. There is a need for training beyond this level, training like that provided by the Stanford Institute.
- There is merit to having a focused, multi-day leadership training event. Among the benefits of this approach are:
  - Strong cohort development
  - Provides different setting, away from the library, which enables participants to focus
  - Allows participants to interact with people from outside the library
- A critical job skill for librarians is interpersonal, small group training. Librarians must have the ability to work in a virtual group.
- If leadership training is directed at those who have been in the profession 3-10 years, then it is important to identify good potential leaders among those new to the profession. Tools and techniques might include for leadership assessment tests/tools, teams projects with rotating team leaders, and new employees academies to identify qualities early. Gen x



and gen y librarians have different leadership styles than boomer generation librarians.

***Findings and Recommendations:***

Holly Hinman presented the preliminary findings and recommendations of the study consultants.

***Findings:***

- The longitudinal survey did not show significant differences between Institute participants and a demographically similar sample of non-participants in any significant area – career mobility, innovation, etc.
- There is a widespread perception among public library directors that there is a strong need for leadership development training, and that the State Library should play a role in providing or paying for that training. Leadership development is seen as related to succession planning.
- Continuing education priorities for the State Library as perceived by the public library directors interviewed can be ranked as follows: 1) technology; 2) leadership development; 3) library skills; 4) customer service; 5) management/supervisory skills. This is somewhat different from the ranking in earlier studies, including the 2001 ETI study, and may reflect the fact that the directors surveyed were all from large public libraries. Directors from smaller and more rural libraries may have different priorities.
- Less than half of the libraries that participated in focus groups or telephone interviews sent anyone to the Stanford-California State Library Institute. When asked why, the most frequent reasons were: 1) no one was interested or suitable; 2) the Institute was so long that it interfered with library or personal schedules; 3) the library had other priorities at the time.
- There is widespread recognition and acceptance of the fact that leadership development training is expensive. With a few exceptions, the libraries surveyed are willing and able to pay for high quality leadership development training.
- Over two-thirds of the library directors interviewed have participated in some type of formal leadership development training. Many pursued this training on their own, after they had assumed their current position.
- No one model of leadership development training will work for everyone, and libraries surveyed expressed strong support for several different options. In addition to a modified Stanford Institute, libraries liked the options of: 1) providing scholarships to existing leadership development training; 2) distributed leadership training that would be more like a series of workshops

given in multiple locations throughout the state over time. Of somewhat lesser interest were the options of encouraging one or more of the library schools to offer leadership training or to contract with an outside agency for leadership training. (In both of the latter options, library directors expressed concern about the quality of the training.)

***Preliminary Recommendations:***

The consultants think that leadership development training should be viewed as a process that includes a number of discrete elements, one of which may be an intense residential institute such as the Stanford-California State Library Institute on 21<sup>st</sup> Century Librarianship. In focus groups and surveys, public library directors have accorded importance to leadership development training, and have indicated that the State Library should play a role in providing such training. If the State Library chooses to continue to provide leadership development training, therefore, the consultants recommend that consideration be given to developing a program with the components outlined below.

<b>Components of Leadership Development Training</b>	<b>Recommended State Library Actions</b>
Career management	<ul style="list-style-type: none"> <li>• Encourage Library Schools to incorporate career management in their curricula</li> <li>• Sponsor development of career management information and make it available on the State Library Web site or a State Library-related Web site</li> <li>• Sponsor Webcasts on career management for library personnel</li> </ul>
Leadership assessment	<ul style="list-style-type: none"> <li>• Sponsor development of a distance education course on leadership assessment</li> <li>• Sponsor development of leadership self-assessment tools and make them available on the State Library Web site or a State Library-related Web site</li> <li>• Sponsor the identification, evaluation, and dissemination of information about existing leadership assessment tools</li> </ul>

Intensive leadership development program or event	<ul style="list-style-type: none"> <li>• Sponsor the identification, evaluation, and dissemination of information about existing intensive leadership development programs and events</li> <li>• Fund scholarships for library personnel to participate in such existing programs and events</li> <li>• Periodically sponsor intensive leadership development events designed specifically for California library personnel</li> </ul>
Exposure to new perspectives	<ul style="list-style-type: none"> <li>• Sponsor the identification, evaluation, and dissemination of information about existing programs and events that can expose library personnel to new perspectives</li> <li>• Fund scholarships for library personnel to participate in such existing programs and events</li> <li>• Sponsor library conference programs on cutting-edge topics and views from outside the library profession</li> <li>• Sponsor Webcasts on cutting-edge topics and views from outside the library profession</li> </ul>
Distributed leadership training	<ul style="list-style-type: none"> <li>• Sponsor the identification, evaluation, and dissemination of information about existing leadership training opportunities throughout the state</li> <li>• Sponsor the development and delivery of library leadership courses throughout the state</li> </ul>

Group discussion points included the following:

- Broad-based support among the Advisory Council for a modified Stanford Institute. There was general agreement that the Institute can be shortened and include fewer participants, but no consensus on other modifications.
  - There was no consensus as to whether or not to include librarians from outside of California.
  - There was no consensus as to whether the Institute needs to be held at Stanford.

- The Advisory Council would like the consultants to present a multi-year, sequential plan for leadership training.
  - This plan should include a statement of the value of continuing education overall and a definition of where leadership training fits in the big picture.
  - There should be some elements related to leadership training that are repeated every year.
  - The full Institute should be given every three years or so.
  - CLA should have a defined role.
  - Infopeople is one piece of statewide CE – the delivery of technical and professional, skills-based continuing education.
  - Leadership training should include development of community outreach/participation.
- There are a number of practical reasons for implementing leadership training over a three-year period, i.e.:
  - To integrate it into the LSTA cycle
  - To obtain “buy-in” from CLA
  - To obtain “buy-in” from the library schools
- There was considerable discussion about whether leadership training sponsored by the State Library should be multitype or limited to public libraries.
  - Although the planning groups for both the Stanford Institute and the Millennium Conference were multitype, and both events were open to all types of libraries, academic and special libraries tended to be under-represented.
  - Academic and special librarians get more leadership training from within their organizations or segmental professional associations.
  - The leadership development needs of public librarians are quite distinctive from those of other types of libraries.
- Evaluation is crucial and should be built into any leadership training from the beginning. It is essential to be able to demonstrate that leadership training does make a difference.
  - There was pre- and post-testing for the Stanford Institute, but it focused on attitudes, which are only a part of outcome measures.
  - Future evaluation needs to gather baseline data from participants on leadership activities, group work, etc.

### ***Next steps***

1. The consultants will integrate all survey and interview data, research, findings, Advisory Council deliberations, and recommendations into a written report that will be presented to State Library staff.
2. State Library staff will review the report and accept or ask for changes.
3. A program at CLA will present the study and its results to the profession.

***Comments from telephone interviews of public library directors:***

Recruitment/succession planning is a crisis!

The top priority should be to get people to enter the profession.

I'm glad the State is looking at leadership training, but unless recruitment problems are solved there won't be anybody left to train.

I have some feeling that leaders are born, not made. Leaders rise when there is a need for them.

I would like to see both the Stanford Institute and the Transition Into Management training reinstated, and am also a big supporter of sending people to national institutes.

The State Library should continue the scholarship program for people who want to get an MLS.

The scholarship program has been fabulous – a great investment.

We need to develop more librarians, and move more BA-holders into “librarian” positions.

Library schools aren't preparing students to be leaders.

Library schools need to do a better job of preparing students for the real world.

Library training is too theoretical already; we need a more practical approach.

Library schools should be teaching career management – how to plan and develop your own career.

Any leadership program's theoretical focus must be tempered by practical applications; otherwise trainees will get all excited but not be able to get things done once they're back on the job.

Libraries look to the State for leadership. Infopeople has transformed the way libraries operate. It would be wonderful to do that in the leadership area. Leadership will be needed more than ever in the future.

If not for Infopeople, we wouldn't be where we are today.

Infopeople is terrific!

Infopeople is the best investment the State Library has ever made.

We rely on Infopeople for all of our technology training.

Infopeople has worked well. We'd like it to continue.

Infopeople does the best training.

Infopeople has set the standard for quality – I'd want leadership training to be at least that good.

My staff always say that Infopeople workshops are the best quality.

I can't tell you what a difference Infopeople has made!

The State Library should realize how valuable Infopeople is –it makes sense to model on or expand Infopeople to cover leadership issues.

The State Library investment in Infopeople has been wonderful – the program has met local needs. What would be useful would be more concrete training in areas like finance, supervision, negotiation techniques, dealing with staff problems.

If CEUs were required by the library profession, maybe more jurisdictions would budget for training.

Survival is the motivating factor for strapped, rural libraries.

Training is what helps the people in the trenches see the big picture.

Stanford is great but the cost per participant is way too high.

We are concerned about the cost to the state in terms of overall priorities for LSTA.

An intense residential experience is great for those who attend but seems like a huge investment in a small number of people.

Prefer 1-day training.

Because of staffing and personal schedules, it would be very difficult to get people to attend programs that take a long time.

We need to allow participants in any special program to self-identify to avoid accusations of playing favorites.

I would like more opportunities for talented staff who do not have library degrees.

Don't restrict leadership training to librarians with MLS.

Training should focus on needs of paraprofessionals as well as MLS holders.

Library skills training for non-MLS staff is needed for the future – reference will be staffed by people with B.A. degrees.

We need targeted initiatives, not a shotgun approach to CE – the State Library should focus on filling in the gaps.

Training locations are always a problem for people in the north state.

Training locations for state-sponsored events are not very good for people in southern California.

The State Library should play a leadership role by funding good training but should not provide it themselves – their staff don't have the training skills.

The State Library could advance professional development by giving scholarships for attendance at key conferences – not just library conferences but other disciplines' conferences as well.

Leadership development is an ideal investment for the State Library – it benefits the entire profession rather than a single library.

My library may not benefit from leadership training but the profession as a whole needs help.

The State Library is not up to date on state of the art librarianship – training should be designed by CE experts who are more in touch with new thinking.

The State Library should seek out new service models and then train us in how to apply them.

Training is more important than most other State Library initiatives.

An environmental scan outside the library profession should be first step in designing any kind of training – this profession needs more new ideas.

The quality of training is more important than the precise delivery method.

There are very few training providers that I'd trust.

Content is important. Pay real attention to the quality of the trainers. It's really helpful for the State Library to pay onsite costs if the training is held in one location. I'd like to see the training distributed in multiple locations around the state.

We need something for late-career librarians to give them a jolt, refresh them for the home stretch.

The training application process is a valuable measure of commitment – don't just make leadership training programs open enrollment.

The annual directors' meeting is very beneficial – leadership "refresher" training could be incorporated in that.

Perhaps the State Library could do a small leadership piece, e.g. an outside speaker, at the annual directors' meeting, to get buy-in from this group.

The annual directors' forum is very useful, especially for networking with colleagues

The annual directors' meeting is a waste of time.

I would like to see the State Library back a program that would reflect well on the profession – something people from other disciplines would respect.

We should train librarians with prospective leaders from other disciplines.

We should tap into the expertise of MPA programs.

Librarians should be leaders in the community, in society, not just in the library field – our professionals need broader exposure and interaction with other professionals.

We need to think in broader terms – librarians as community leaders.

CLA could help with mentoring.

Leadership training is just the latest fad – soon it will go the way of TQM and other such trends.

Much more interested in developing management skills.

Don't make the training electronic – face to face meetings with colleagues and the chance to talk in person are vital.



We're interested in the results-oriented training that is being offered through PLA; could Infopeople do something in that area?