This study examined the amount of management experience, development, preparation, and training possessed by middle managers in academic libraries. Previous studies and reports have pointed out that librarians often take on middle management roles without extensive preparation and training to perform management duties and without much previous experience performing management duties. This study found there has been some improvement in the preparation and training of academic librarians to handle management duties over the past couple of decades. Presently, most middle managers in academic libraries have had at least some prior experience performing management duties before becoming middle managers. Additionally, most academic library middle managers participate in management training prior to and during their jobs as middle managers. However, the study also found room for improvement in some areas of management preparation and training within the academic librarian profession.
THE CURRENT STATE OF MANAGEMENT PREPARATION, TRAINING, AND DEVELOPMENT AMONG MIDDLE MANAGER LIBRARIANS IN ACADEMIC LIBRARIES

by

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Introduction

Academic libraries exist within the unique environment of higher education. Operating structures among professionals within the academy differ from those of most other organizations because they are usually marked by more collegiality and a greater degree of democratic compromise in decision making. Control is diffuse throughout the university or college as a whole and within individual academic departments. This organizational structure has interesting implications for management and governance within the academy, mainly concerning who, if anybody, is really in charge.

Management issues within the academic library can be further complicated by the ambiguous position that the library holds within the larger academic institution. Debates continue over whether the library is an academic unit or a separate, distinct part of the organization. This ambiguity often extends to the librarians themselves. Librarians are certainly professionals, but should they be seen as faculty members in the same sense that economics professors are faculty members? Such questions have had an effect on the role of management within the academic library. Academic libraries do in fact have a hierarchical structure, but the relationships between professional librarians are usually viewed as relationships of peers and equals. Furthermore, those who enter the profession are usually seeking to become librarians, not managers. Thus, managerial tasks have sometimes been seen as a backdrop or unfortunate necessity, dismissed to a certain extent as not really a part of librarianship as a discipline. However, the importance afforded to or not afforded to management within the academic library has gained newfound interest
in recent decades. This study examined a central dimension of that newfound interest: the preparation and development of academic librarians to take on the role of manager.

**Literature Review**

With his 1980 article titled “Library Managers: Can They Manage? Will They Lead?” Charles McClure put out a clarion call for more attention to be paid to the discipline of management in academic libraries and for more formal training in the techniques of management to be provided to librarians. Specifically, McClure declared:

> The dominant concept for library and information professionals as we enter the next hundred years is that of management…. Unfortunately, library managers are ill equipped to respond to societal information problems via improved managerial techniques…. In part, poor performance as a manager and the secondary importance of management can be attributed to a lack of formal managerial preparation. (McClure, 1980, p. 2388-2389)

McClure was writing about all sorts of academic library managers, up to and including library directors. However, a lack of management preparation is likely to be most acute at the middle level of management, among those librarians who are newer to management and are mediating between the upper administrators and front line professionals and paraprofessionals. In fact, shortly after McClure’s article, Deanna Marcum (1983) noted that a lack of management training for middle managers was one of the greatest contemporaneous problems facing research libraries (p. 4).

As McClure noted further in his 1980 article, age and years of library experience seemed to be the main criteria determining who entered a managerial role. Managers rarely had other advanced degrees, and if they did, the degrees were in academic disciplines like the humanities or sciences rather than in management. Short of second degrees in a management field, managers in libraries rarely had *any* training in traditional
management topics such as budget preparation, personnel management, planning, and evaluation. Furthermore, those in managerial positions hardly thought of themselves as managers, seeing themselves as librarians first and as managers only secondarily (p. 2389). A concurrent study backed up McClure’s contentions. In *Supervisory and Middle Managers in Libraries*, Martha Bailey (1981) noted that “Libraries often do not have employees with training in management” (p. 1). She also found that middle managers “may lack the experience of working under trained managers. They also may consider themselves to be specialists first and managers second” (Bailey, 1981, p. 2).

Those subsequently writing on the same subject have generally expressed the same conclusions. After surveying the heads of cataloging and reference departments at libraries belonging to the Association of Research Libraries (ARL), Stephanie Wittenbach, Sever Bordeianu, and Kristine Wycisk (1992) found that between 93% and 96% of those department heads had no formal classroom management training beyond library school before becoming a department head. Additionally, over half of their respondents had not participated in management workshops prior to starting a job as a department head. Finally, that study also found that many department heads possessed only a few years of management experience in lower level managerial roles prior to becoming a department head (p. 322-323).

These outcomes likely represent the reality that many department heads may not have anticipated becoming managers as soon as they did or at all. In *Transitioning from Librarian to Middle Manager*, Pixie Anne Mosley (2004) wrote that “Librarianship is a profession where an eventual move into a managerial role is not automatically assumed” (p. xi). She points out that many librarians focus on being a career librarian and becoming
experts in their specialist roles, such as those of a language specialist cataloger or subject
specialist reference librarian. Others focus on the scholarship role of academic
librarianship. For those who do transition into management roles, the move can be
Gordon (2005) reiterated the notion that many librarian managers enter management
roles by accident. They may have temporarily filled a management role when their
supervisor stepped down, and then been asked to assume the job permanently, or they
may have had management responsibilities placed upon them by their administrators.
Having surveyed 244 librarian managers, Gordon found that many emphasized the
accidental nature of having taken on a management role and that most had little to no
previous formal management training (p. xiii-xvii). Even before becoming a librarian,
many library school students have already developed an attitude against ever becoming a
manager. Rich Gazan (2007) surveyed library students and asked them to agree or
disagree with statements about their work preferences. Based on the statements the
students most strongly disagreed with, the results indicated many of them would not want
to manage projects, manage people, or direct a library (p. 243).

Indeed, the nature of library school management courses and the attitudes of
students hamper the preparation of many librarians to become managers. Bailey noted
that more than half of the academic library middle managers she interviewed stated their
management courses in library school were of no use to them in their positions as middle
managers. The library administrators she interviewed also felt library school management
courses were of little value (1981, p. 109). The trouble arises because most middle
managers are out of school for at least three to five years before becoming managers. By
that time they have forgotten most of what they learned in their management courses in school (Bailey, 1981, p. 112). Gordon makes many of the same points in her book. She states that management classes in LIS schools may have been theoretical, or aimed at administration, without much emphasis on middle level management issues. Furthermore, students may have downplayed the class, not expecting to become managers. Finally, managers may have gone to a school that did not have a management requirement (2005, p. xiv). On top of these problems, Gazan added that library school classes are unable to instill much concrete understanding of management issues and skills when they are not coupled with other learning opportunities. He proposed adding a practicum component to library school management education to solve this problem (2007, p. 245). Generally speaking, library school by itself does not prepare librarians to effectively serve as a manager in a library.

While these issues of deficiency in the preparation and training of mid-level academic library managers have been commented on since McClure and Bailey were writing in the early 80s, they have begun to take on a more pressing urgency in recent years. Writing about reference department heads, Lynda Leahy (2003) noted that the ability to manage has become “more crucial than ever” and summed up this idea by stating, “Balancing the increasing pressures from shrinking budgets, growing costs, proliferation of expensive electronic resources, and high expectations from faculty and students creates a greater need for strong management expertise. The head of reference must be both an exceptional manager and an exceptional librarian” (p. 5). William Curran (2003) has argued that the aging of the profession and an impending wave of retirements among academic librarians have special implications for the ranks of middle managers.
The aging of the profession has combined with a lack of management experience in the “middle-aged group” of academic librarians. Middle-aged librarians did not receive enough opportunity to develop as managers on account of budget cuts over the past few decades. As middle managers retired, those positions were frozen or abolished (p. 135). Additionally, as administrators and managers became more pressed for time, mentoring and training of the next generation of managers lost out (Curran, 2003, p. 138). Thus, Curran expects a huge shortage of qualified librarians at the level of middle manager, in addition to the shortages at the entry level expected by other writers (2003, p. 135). James Neal (2006) discussed the increasing number of professionals without MLS degrees who are entering the academic library profession and the increase of staff participation in areas once handled solely by professionals. These trends mean there is a need for “more effective training for managers in working with more ambiguous definitions of professional and more blended staff participation” (p. 44).

Given the dearth of academic librarians with the needed training in management, the seeming inability of library school management courses to completely prepare librarians to take on actual management duties, and the increasing importance of management skills in the discipline of academic librarianship, many professionals and scholars have called for academic libraries themselves to participate more in encouraging and facilitating the preparation of academic librarians for management roles. When Bailey and McClure were writing, only 36% of academic libraries were offering in-house management training (Bailey, 1981, p. 112). Academic libraries cannot expect to always recruit managers from other academic libraries, because there is a looming profession-wide shortage of librarians (Curran, 2003, p. 135). Furthermore, academic libraries
cannot simply look outside the profession to recruit those with management expertise. Felix Unaeeze (2003) points out that such a course of action would harm trust within departments, demean the profession, and cause a rift among professionals (p. 114-115).

Maureen Sullivan (1992) called for the profession to get out ahead of this curve nearly fifteen years ago when she stated “While individual managers must do all they can to develop necessary skills and abilities, senior administrators in today’s research libraries have an important responsibility to prepare current and future middle managers” (p. 279). She asked administrators to provide support for librarians to attend management training programs, to serve as mentors, and to provide coaching sessions and on-the-job management training experiences (Sullivan, 1992, p. 279-80). More recently, Philip Howze repeated this call to action by writing, “Libraries can and must respond to the shortage of qualified leaders by establishing training programs and encouraging continuing education in management studies” (2003, p. 31). Mosley made the same point by stating, “The creation of good library managers is not a ‘wave the magic wand’ or ‘abracadabra’ type of process. It involves recognizing potential in entry-level and mid-career librarians and giving them the opportunity to grow and develop skills that are appropriate to managerial responsibilities” (2004, p. xii).

**Research Question**

Scholars and professional librarians have shown that library school management classes are not enough to create good managers, management training has not received enough focus from libraries themselves in the past, and management skills are now more important than ever. The last time research was applied to examine management preparation and training amongst academic librarians was in 1992, when the study by
Wittenbach et al. gave a mixed picture of management and training at the time. That study showed that academic library department heads had some prior on-the-job management experience, but they were lacking in prior formal management training outside of library school. The study did find that once they became department heads, librarians were participating in on-going management training. Still, although many academic libraries supported this ongoing training through time off and financial assistance, the majority neither required nor encouraged continuing management education.

Since management skills are gaining newfound importance within academic libraries and the last study on management preparation and training was completed 17 years ago, it was time to revisit the topic of management preparation, training, and development among middle managers in academic libraries. Accordingly, this study sought to answer the question: What is the current state of management preparation, training, and development among middle managers in American academic libraries and how does this state compare to that of previous decades?

This research question was answered by examining the following sub-questions:

**Sub-question 1**: What management preparation, training, and development did current middle managers in academic libraries receive before becoming middle managers?

**Sub-question 2**: What ongoing management preparation, training, and development have current middle managers participated in since becoming middle managers?

**Sub-question 3**: How are the upper administrations of academic libraries supporting the preparation, training, and development of their employees in the area of management?
Sub-question 4: What attitudes do library administrators and middle managers have towards management preparation, training, and development, and what methods do they believe to be most effective at developing employees into managers?

Methodology

This study sought to examine the sub-questions and answer the research question by following the methodology of the Wittenbach et al. study, while also expanding upon that study’s methods. The resulting methodology involved the use of two online surveys. The surveys were created using the Qualtrics survey software available through the Odum Institute for Research in Social Science at the University of North Carolina at Chapel Hill. The surveys were pre-tested by a small group of academic librarians in North Carolina and then edited to incorporate the feedback offered by those librarians. Potential subjects were invited to participate through email. The email invitation contained a link that took participating subjects to the survey website, where they completed and submitted the survey electronically.

The sample of subjects was developed by first creating a sample of academic libraries. The Wittenbach et al. study focused solely on libraries that are members of ARL. The current study also included ARL libraries in its sample. ARL libraries represent some of the largest academic libraries in the country, meaning that management tasks at these libraries may be especially complex. Therefore, it is important to gain an understanding of the state of management preparation and training at ARL libraries. All 99 American academic libraries that are ARL members were included as part of the sample. However, the sample for this study went further than that found in the Wittenbach et al. study by also including academic libraries beyond the ARL
membership. This expansion allowed for a fuller accounting of management preparation and training throughout the academic library population. After creating the first part of the sample of institutions from the group of ARL libraries, a random sample of 243 academic libraries at other universities and colleges was taken to represent the population of non-ARL academic libraries. This number is 10% of the 2,425 four-year American universities and colleges that grant at least bachelor’s degrees (National Center for Education Statistics). As the libraries for this second sample were being chosen, the organizational structure of each library was examined. If a very small academic library was identified as not having a middle level of management, it was excluded from being in the sample, and a more appropriate library was randomly selected in its place. Once the sample of 342 American academic libraries was established, a sample of individual librarians was then created by selecting employees from these 342 libraries based on the positions the librarians held. There were two groups of librarians selected and an individual survey was constructed for each group.

The first survey targeted academic librarians who are currently middle managers. For the purposes of this study, middle managers are defined as department heads. This definition was chosen because department heads operate within the library between the first levels of supervision and the highest levels of administration. Specifically, the librarians in charge of the reference and cataloging functions at the main branches of the chosen academic libraries were surveyed. These middle managers were targeted in particular because (1) departments encompassing the reference and cataloging functions are likely to be comparatively large, and the management duties are likely to cover several areas of management and involve the supervision of both professionals and
paraprofessionals, and (2) the use of these departments will allow for easy historical comparison to the results of the Wittenbach et al. study, which focused on cataloging and reference department heads. Since organizational structures vary from library to library, the functional areas of the departments included in this study expanded beyond just “reference” and “cataloging.” Altogether, the important point was whether the manager's department included the reference or cataloging function, despite the actual title of their department. Thus, differing organizational structures meant that the targeted departments included those with the following titles: reference, cataloging, public services, research and instructional services, technical services, metadata services, and other title variations.

Thus, once the sample of libraries had been assembled, the specific department heads to be surveyed were chosen based on who oversees the reference and cataloging functions at the departmental level according to each library’s organizational structure. If a library’s website clearly established the library’s organizational structure and included contact information, the email addresses of the department heads in charge of reference and cataloging were obtained from the library website. If the organizational structure was not clearly identified on a library’s website, or contact information was not available online, a phone call to the library was used to determine who oversaw reference and cataloging and to obtain the email addresses of those librarians. Once all of the email addresses had been collected, the department heads were sent a link to the survey through email as described above. Since two department heads from each university or college were targeted, but some department head positions were vacant or filled only on an interim basis, the total department head sample included 642 individual librarians. The department head surveys gathered data on basic information about the department head
and their job, the department head’s management training and experience prior to becoming a department head, their ongoing training and education since becoming a department head, the support they receive from their library for training and continuing education in management, whether training in management has been required or encouraged at their library, and their views on the efficacy of different management training and preparation methods.

The second survey focused on the views of library administrators. The university librarian, dean of libraries, or library director for each library in the sample was invited to participate in this second survey. The methods used to gather administrator contact information and send the survey invitations to administrators were the same as described above. The total administrator sample included 342 individual librarians. The questions in this second survey gathered data on the attitudes of library administrators towards the importance of formal management education and training for librarians, both before and after those librarians assume roles as middle managers, the efforts library administrations make to identify and develop potential managers, and the views of administrators on the efficacy of different management training and preparation methods.

Both surveys were conducted at the same time. The surveys were open on the Qualtrics website for three weeks. The original email invitations were sent out on Monday, January 26th, 2009, and the survey closed on Friday, February 13th, 2009. During the open period, the department heads and administrators were sent two reminder emails that asked them once again to consider participating and reminded them of the deadline date. Once the survey period ended, the data from all surveys that were totally completed from start to finish were saved and analyzed. The data held in partially
completed surveys were not used in the data analysis.

Once the final data set for each survey was constructed, descriptive statistics such as measures of central tendency and the proportion of respondents falling into various categories were generated and used to determine the answers to the four sub-questions posed in the Research Questions section above. These statistics were first calculated for the department head and administrator groups as a whole. Then, statistics for various pairs of sub-groups were calculated to see if there were any significant differences between these sub-groups. The first pair of sub-groups was created by dividing the respondents according to whether they worked at an ARL or a non-ARL library. ARL libraries tend to be larger than non-ARL libraries, but there are many larger academic libraries that are not members of ARL. Thus, the second pair of sub-groups was created by dividing the respondents according to the size of the university or college at which they work. The median size of the sampled universities and colleges was calculated and the institutions were divided into a group that was larger than the median size and a group that included the median size and all smaller institutions. The final pair of sub-groups was used only when examining the department head results for the first two sub-questions. This pair divided the department heads into those who began their first department head job before 2003 and those who started since 2003.

In order to determine whether there were any statistically significant differences between the sub-groups in each pair for any of the calculated statistics, two statistical tests were used. To test for differences in data that involved means, a t-test assuming unequal variances was performed. To test for differences in data that involved proportions, a z-test was performed. Both of these tests were performed at the 95%
confidence level. The results of the t-tests and z-tests will only be discussed in this report when they revealed statistically significant differences between the two sub-groups in a pair. Once the answers to each sub-question were examined, a synthesis of all the generated data was used to draw conclusions and answer the main research question.

This methodology was chosen based on its appropriateness to the research question and its ability to provide accurate results. Surveys are appropriate for research looking at self-reported beliefs and behaviors. It is true that surveys can only measure what the respondents say, rather than directly measuring reality. However, there is no other alternative in this study’s case because the data sought are not generally recorded anywhere except in the minds of the respondents. The results of the pre-test helped ensure that the final surveys were constructed in a manner that promoted increased reliability and internal validity. Reliability and internal validity were also enhanced by the fact that the surveys were informed by a previous survey instrument that was used in a study ultimately published in a reputable scholarly journal. The samples for the survey have been purposefully chosen to provide for external validity. The results should be generalizable to the wider population of academic librarian middle managers.

Finally, the Qualtrics survey software is designed to help researchers avoid the possible disadvantages of web-based surveys. All academic librarians were likely to have access to a computer and email, and the invitations to participate were targeted to specific librarians, rather than being open to all. Thus, accurate and extensive coverage of the population in question was not a problem. Respondent privacy was protected by using a secure computer network, and only the researcher had access to the data through a password protected website account. Lastly, verification of the identities of respondents
was assured because each email invitation had a coded link that only allowed the invitation recipient to respond to the survey, and those recipients were only allowed to respond to the survey once. Overall, the study’s methodology provided for meaningful data and accurate answers to the research questions.

Results

Respondent Profile

Before presenting the results of the survey questions aimed at answering the sub-questions, it helps to have an understanding of some of the basic characteristics of the respondents. Overall, 255 department heads and 159 library administrators completed their respective surveys. These numbers constituted a 40% response rate for the department head survey and a 46% response rate for the administrator survey. Since two department heads and the chief administrator of the main library at each university were invited to participate, each sampled university or college could have provided up to three different respondents to the surveys. In fact, many institutions did provide more than one respondent. Ultimately, 264 different universities and colleges were represented among the individual respondents. Of those universities and colleges, 72 have libraries that are members of ARL, making for 27% of the total. The institutions ranged in size from a low enrollment of around 1,400 students to a high enrollment of over 50,000 students. Thus, a very diverse set of institutions were represented among the respondents.

In terms of the middle manager respondents, 55% were serving in their first job as a department head and 45% had served as a department head previous to obtaining their current job as a department head. On average, these managers had 11.9 years of
experience as department heads. Figure 1 provides a snapshot of the management duties that these department heads perform.

**Figure 1: Management Duties Performed by Responding Department Heads**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting to administrators</td>
<td>249</td>
<td>97%</td>
</tr>
<tr>
<td>Coordinating the work flow in their department</td>
<td>246</td>
<td>95%</td>
</tr>
<tr>
<td>Interviewing applicants</td>
<td>243</td>
<td>94%</td>
</tr>
<tr>
<td>Defining the duties of the positions in their department</td>
<td>238</td>
<td>92%</td>
</tr>
<tr>
<td>Evaluating staff performance</td>
<td>238</td>
<td>92%</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>212</td>
<td>82%</td>
</tr>
<tr>
<td>Supervising paraprofessional staff</td>
<td>212</td>
<td>82%</td>
</tr>
<tr>
<td>Organizing the structure of their department</td>
<td>207</td>
<td>80%</td>
</tr>
<tr>
<td>Supervising professional staff</td>
<td>195</td>
<td>76%</td>
</tr>
<tr>
<td>Directly making hiring decisions</td>
<td>168</td>
<td>65%</td>
</tr>
<tr>
<td>Supervising student workers</td>
<td>122</td>
<td>47%</td>
</tr>
<tr>
<td>Proposing and administering the budget for their department</td>
<td>108</td>
<td>42%</td>
</tr>
<tr>
<td>Other</td>
<td>48</td>
<td>19%</td>
</tr>
<tr>
<td>Department head does not perform management duties</td>
<td>4</td>
<td>2%</td>
</tr>
</tbody>
</table>

The management duties performed by department heads were fairly consistent across the various pairs of sub-groups. As a reminder, statistical tests were performed to determine if there were significant differences between ARL libraries and non-ARL libraries, or between larger libraries and smaller libraries generally, in the areas investigated by the surveys. A statistically significant higher proportion of ARL department heads, and department heads in the larger libraries in general, organize the structure of their department, supervise professional staff, and evaluate staff performance.
Also, a significantly higher proportion of department heads at larger libraries supervise paraprofessional staff than those at smaller libraries. These differences are presented in Table 1 and Table 2.

### Table 1: Management Duty Comparison - ARL vs. non-ARL Libraries

<table>
<thead>
<tr>
<th>Type of Duty</th>
<th>ARL (N=68)</th>
<th>Non-ARL (N=187)</th>
<th>Z-score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize the Structure of the Department</td>
<td>91%</td>
<td>76%</td>
<td>2.67</td>
</tr>
<tr>
<td>Supervise Professional Staff</td>
<td>96%</td>
<td>68%</td>
<td>4.63</td>
</tr>
<tr>
<td>Evaluate Staff Performance</td>
<td>100%</td>
<td>89%</td>
<td>2.87</td>
</tr>
</tbody>
</table>

### Table 2: Management Duty Comparison - Larger vs. Smaller Libraries

<table>
<thead>
<tr>
<th>Type of Duty</th>
<th>Larger (N=122)</th>
<th>Smaller (N=133)</th>
<th>Z-score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organize the Structure of the Department</td>
<td>86%</td>
<td>75%</td>
<td>2.23</td>
</tr>
<tr>
<td>Supervise Professional Staff</td>
<td>84%</td>
<td>68%</td>
<td>3.01</td>
</tr>
<tr>
<td>Supervise Paraprofessional Staff</td>
<td>89%</td>
<td>76%</td>
<td>2.75</td>
</tr>
<tr>
<td>Evaluate Staff Performance</td>
<td>97%</td>
<td>88%</td>
<td>2.73</td>
</tr>
</tbody>
</table>

ARL and larger library department heads also supervise a significantly higher mean number of professional and paraprofessional staff. Table 3 presents the mean number of employees that the respondent department heads supervise by staff category and by type of library. Finally, some of the common management duties represented in the “Other” category in Figure 1 include project management, representing the library on university or statewide committees, scheduling service hours, overseeing training, and coordinating budgets and services with other departments.
Table 3: Mean Number of Employees Supervised by Department Heads

<table>
<thead>
<tr>
<th>Type of Library</th>
<th>Professional Staff Supervised</th>
<th>Paraprofessional Staff Supervised</th>
<th>Student Staff Supervised</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Libraries</td>
<td>5.5</td>
<td>4.6</td>
<td>4.8</td>
</tr>
<tr>
<td>ARL Libraries</td>
<td>8.1</td>
<td>7.0</td>
<td>4.6</td>
</tr>
<tr>
<td>Non-ARL Libraries</td>
<td>4.1</td>
<td>3.6</td>
<td>4.8</td>
</tr>
<tr>
<td>(T-test p-value)</td>
<td>(.000)</td>
<td>(.003)</td>
<td>-</td>
</tr>
<tr>
<td>Larger Libraries</td>
<td>6.7</td>
<td>5.4</td>
<td>5.5</td>
</tr>
<tr>
<td>Smaller Libraries</td>
<td>4.1</td>
<td>3.7</td>
<td>4.1</td>
</tr>
<tr>
<td>(T-test p-value)</td>
<td>(.000)</td>
<td>(.014)</td>
<td>-</td>
</tr>
</tbody>
</table>

Sub-question results

The remaining results of the two surveys are reported below in the context of the four sub-questions. The data presented apply to either the group of library administrator respondents or the group of department head respondents as a whole, based on the topic being discussed. In general, data on the three pairs of sub-groups are not presented. Instead, data on the pairs of sub-groups are presented only in cases where meaningful and statistically significant differences were found between the responses of one sub-group and its pair sub-group.
Sub-question 1: What management preparation, training, and development did current middle managers in academic libraries receive before becoming middle managers?

The department heads were asked several survey questions related to the first research sub-question. The first of these questions sought to measure the extent to which the department heads participated in several types of formal and on-the-job management training prior to beginning their first job as a department head in an academic library. In terms of formal training, department heads were asked how many classes, workshops, etc. they had completed in the following categories:

- Management classes while in library school
- Management classes at a library school since graduating
- Classes in business schools or public administration programs
- Management workshops or seminars

They were also asked whether they had obtained a second master’s degree in a management field (such as a MBA or MPA) and whether they had completed a management internship or fellowship. Table 4 presents the mean number of classes or workshops completed by the respondent group in each category of training, the number of respondents who said they participated in each category, and the proportion of respondents who participated in each category.
Table 4: Formal Management Training Prior to First Department Head Job

<table>
<thead>
<tr>
<th>Type of Training</th>
<th>Mean Number of Classes Taken</th>
<th>Number of Participants</th>
<th>Proportion of Total (N=248)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management classes while in library school</td>
<td>1.01</td>
<td>192</td>
<td>77%</td>
</tr>
<tr>
<td>Management workshops or seminars</td>
<td>2.78</td>
<td>143</td>
<td>58%</td>
</tr>
<tr>
<td>Classes from business or public administration programs</td>
<td>0.24</td>
<td>24</td>
<td>10%</td>
</tr>
<tr>
<td>Management classes at a library school since graduating</td>
<td>0.10</td>
<td>13</td>
<td>5%</td>
</tr>
<tr>
<td>A 2nd Masters degree in a management field</td>
<td>-</td>
<td>13</td>
<td>5%</td>
</tr>
<tr>
<td>Management internships or fellowships</td>
<td>-</td>
<td>9</td>
<td>4%</td>
</tr>
</tbody>
</table>

Table 4 shows that management classes taken while in library school and management workshops or seminars were the most widely used types of formal management training engaged in by the department heads before they obtained their first job as a department head. Overall, after examining department head responses on an individual basis, the analysis showed that 92% of the respondents had participated in at least one type of formal management training prior to becoming a department head. However, 28% of respondents reported that the only type of formal management training they had completed before becoming a department head was a management class, or management classes, in library school. Thus, 36% of first time department heads had either no formal management training at all or no formal management training beyond classes in library school. This general pattern held for each of the sub-groups as well.
There were no significant differences in the attainment of formal management training prior to the first department head job between ARL versus non-ARL librarians, librarians at larger libraries versus smaller libraries, and librarians who obtained their first department head job prior to 2003 versus those who obtained their first department head job since 2003.

Still, formal management training was not the only type of training studied in the survey. The department heads were also asked about what types of on-the-job management training they had received prior to obtaining their first jobs as department heads. Figure 2 shows the proportion of respondents who participated in various categories of on-the-job management training prior to becoming department heads.

**Figure 2: Types of On-the-Job Management Training Obtained Prior to First Department Head Job**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not participate in on-the-job management training</td>
<td>143</td>
<td>58%</td>
</tr>
<tr>
<td>Mentorship from department heads</td>
<td>96</td>
<td>39%</td>
</tr>
<tr>
<td>Shadowing department heads</td>
<td>22</td>
<td>9%</td>
</tr>
<tr>
<td>Formally structured in-house training program in management skills</td>
<td>16</td>
<td>6%</td>
</tr>
<tr>
<td>Other methods</td>
<td>3</td>
<td>1%</td>
</tr>
</tbody>
</table>
structured in-house training program in management skills or had shadowed a department head, which would involve actually observing the department head perform their management tasks. This general pattern held for each of the sub-groups for the most part. The one statistically significant difference was in the percentage of ARL department heads versus non-ARL department heads who had participated in a formal in-house training program in management skills. Only 4% of non-ARL department heads had participated in a formal in-house management training program prior to becoming a department head, while 13% of their ARL counterparts had done so (z-score = 2.58).

Department head responses were examined on an individual basis to determine their overall participation in both types of management training prior to becoming department heads. When formal and on-the-job management training were considered together, the analysis showed that 95% of the respondents had participated in at least one type of formal or on-the-job management training before starting their first job as a department head. Also, 81% of respondents had participated in at least one type of formal or on-the-job management training beyond a management class in library school before starting their first department head job.

In addition to investigating the management training department heads had received prior to moving into middle management positions, the survey also asked the department heads how many years of experience they had in other management roles besides department head positions. Table 5 presents the mean number of years of management experience department heads possessed in various categories of experience, the number of respondents who had experience in each category, and the proportion of respondents who had experience in each category.
<table>
<thead>
<tr>
<th>Type of Experience</th>
<th>Mean Years of Experience</th>
<th>Number with Experience</th>
<th>Proportion of Total (N=237)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acting department head position(s)</td>
<td>0.36</td>
<td>64</td>
<td>27%</td>
</tr>
<tr>
<td>Assistant department head position(s)</td>
<td>0.42</td>
<td>31</td>
<td>13%</td>
</tr>
<tr>
<td>Unit head/team leader position(s)</td>
<td>2.05</td>
<td>96</td>
<td>41%</td>
</tr>
<tr>
<td>Other management position(s)</td>
<td>0.70</td>
<td>28</td>
<td>13%</td>
</tr>
</tbody>
</table>

Table 5 shows that department heads did have a fair amount of previous management experience in other roles. An examination of each individual's previous experience showed that 69% of respondents had previous management experience in at least one of the types of experience investigated in the survey. Also, after the number of years of experience across categories were added together for each individual department head, the mean number of combined years of previous experience totaled almost three and half years for the group of department heads as a whole. However, there were statistically significant differences between the sub-groups in this area. ARL librarians had a significantly higher mean in the number of years spent as unit heads or team leaders compared to non-ARL librarians, 3.18 years versus 1.61 years (t-test p-value = .008). Additionally, a significantly higher proportion of ARL librarians had previous management experience in general, with 75% of ARL librarians having previous experience in at least one of the types of management experience investigated and only 60% of non-ARL librarians having such experience (z-score = 2.15). Also, a significantly higher proportion of ARL librarians had previous management experience as acting
department heads (37% vs. 23%, z-score = 2.17) and as unit heads or team leaders (60% vs. 33%, z-score = 3.78). The same exact differences existed between larger and smaller libraries in general. Plus, a significantly higher proportion of department heads in larger libraries (18%) had previous assistant department head experience compared to their counterparts in smaller libraries (8%) (z-score = 2.30).

**Sub-question 2: What ongoing management preparation, training, and development have current middle managers participated in since becoming middle managers?**

In order to answer this second sub-question, department heads were asked about the formal and on-the-job training they have participated in since they became middle managers. In terms of formal training, Table 6 presents the mean number of classes or workshops completed by the respondents while serving in a department head role, the number of respondents who said they participated in each category of training, and the proportion of respondents who participated in each category. Once again, management workshops and seminars were the preferred method of obtaining formal management training. Few department heads have taken full management classes at a university or participated in a management internship or fellowship since becoming a department head. However, after examining each individual respondent’s answers across all types of formal training while a department head, the analysis shows that 13% of respondents have not had any formal management training while in their positions as department heads. For the 87% who have participated in such training, they take about one class every two years, averaging .59 classes a year.
Table 6: Formal Management Training While a Department Head

<table>
<thead>
<tr>
<th>Type of Training</th>
<th>Mean Number of Classes Taken</th>
<th>Number of Participants</th>
<th>Proportion of Total (N=240)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management workshops or seminars</td>
<td>4.81</td>
<td>199</td>
<td>83%</td>
</tr>
<tr>
<td>Management classes at a library school since graduating</td>
<td>0.24</td>
<td>38</td>
<td>16%</td>
</tr>
<tr>
<td>Classes in business or public administration programs</td>
<td>0.17</td>
<td>15</td>
<td>6%</td>
</tr>
<tr>
<td>A 2nd Masters degree in a management field</td>
<td>-</td>
<td>12</td>
<td>5%</td>
</tr>
<tr>
<td>Management internships or fellowships</td>
<td>-</td>
<td>9</td>
<td>4%</td>
</tr>
</tbody>
</table>

There were not any significant differences between ARL department heads and non-ARL department heads when it came to participating in ongoing formal management training. However, when it comes to library size in general, significantly higher proportions of department heads at larger libraries have taken classes in a business or public administration program (10% vs. 3%, z-score = 2.23) and participated in management workshops or seminars than their counterparts at smaller libraries (90% vs. 77%, z-score = 2.69). Finally, managers who first became department heads since 2003 have a significantly higher mean of classes or workshops taken per year than department heads who started their first jobs before 2003, with the former averaging 1.14 courses per year and the later averaging only .47 courses per year (t-test p-value = .002). Thus, department heads seem to be participating in more ongoing formal management training at the start of their department head careers and participating in less formal training as they become more experienced in middle management.
Department heads were also asked about the on-the-job management training they have received while serving as a middle manager. Figure 3 presents their responses. More department heads have participated in on-the-job management training since starting their jobs than did so before becoming middle managers, but nearly half still say they have not participated in any on-the-job management training since joining the ranks of middle managers. Those who have participated in ongoing on-the-job management training mostly received mentorship from senior administrators, but 17% have participated in a formally structured on-the-job management training program provided by their library. There were no significant differences between sub-groups in this area.

**Figure 3: Types of On-the-Job Management Training Obtained while Serving as a Department Head**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Did not participate in on-the-job management training</td>
<td>115</td>
<td>47%</td>
</tr>
<tr>
<td>Mentorship from administrators</td>
<td>108</td>
<td>44%</td>
</tr>
<tr>
<td>Formally structured in-house training program in management skills</td>
<td>42</td>
<td>17%</td>
</tr>
<tr>
<td>Shadowing administrators</td>
<td>16</td>
<td>6%</td>
</tr>
<tr>
<td>Other methods</td>
<td>11</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Sub-question 3: How are the upper administrations of academic libraries supporting the preparation, training, and development of their employees in the area of management?*

For the purposes of answering Sub-question 3, both department heads and administrators were asked whether both formal and on-the-job training is required or encouraged by their libraries. Both survey groups were also asked about whether or not their library supported their participation in formal management training with either
financial assistance or release time from their jobs. The department head and administrator responses were combined to determine which libraries required, encouraged, and supported management training for their department heads. If there was an internal disagreement between the answers given by multiple respondents at the same library, the responses for that library were removed from the analysis. For example, if the administrator from a particular library stated department heads at their library were encouraged to participate in formal management training, but a department head from the same library stated formal management training was neither required nor encouraged, the answers from that library were not included in the analysis.

There were, in fact, internal disagreements in the answers given by many of the libraries in this area. Figure 4 presents the tabulated responses for whether formal management training is required or encouraged. Due to internal disagreements in the answers about formal management training, only 178 of the 264 represented libraries had their responses count for this question. Of those 178 libraries, the majority encourage their department heads to participate in ongoing formal management training, with a few more libraries requiring such training. Still, 34% of those libraries neither require nor encourage ongoing formal management training. Finally, when sub-group differences were examined, the analysis showed that a significantly higher proportion of ARL libraries and larger libraries require ongoing formal management training than non-ARL libraries (19% vs. 5%, z-score = 2.93) and smaller libraries (13% vs. 4%, z-score = 2.13).
Figure 4: Formal Management Training Requirements

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal Training is Required</td>
<td>15</td>
<td>8%</td>
</tr>
<tr>
<td>Formal Training is Encouraged</td>
<td>102</td>
<td>57%</td>
</tr>
<tr>
<td>Formal Training Participation is Neither Required nor Encouraged</td>
<td>61</td>
<td>34%</td>
</tr>
</tbody>
</table>

Figure 5 indicates the proportion of libraries that support ongoing formal training in one way or another. Due to internal disagreements, 212 of the 264 represented libraries had answers recorded for this question. Figure 5 shows that the vast majority of respondent libraries offer support to department heads who pursue ongoing formal management training, with a full three quarters of libraries offering both financial assistance and release time. However, a significantly higher percentage of ARL libraries and larger libraries offer both financial assistance and release time for ongoing formal management training than non-ARL libraries (87% vs. 71%, z-score = 2.48) and smaller libraries (82% vs. 70%, z-score = 2.05), which makes sense given that more ARL and larger libraries require such training.

Figure 5: Library Support for Formal Management Training

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Assistance Only</td>
<td>12</td>
<td>6%</td>
</tr>
<tr>
<td>Release Time Only</td>
<td>26</td>
<td>12%</td>
</tr>
<tr>
<td>Both Financial Assistance and Release Time</td>
<td>161</td>
<td>76%</td>
</tr>
<tr>
<td>No Support Offered</td>
<td>13</td>
<td>6%</td>
</tr>
</tbody>
</table>
Figure 6 presents the proportion of libraries requiring and encouraging on-the-job training for current department heads. Due to internal disagreements, only 157 of the 264 represented libraries had answers recorded for this question. Of those libraries, the majority requires or encourages on-the-job training. However, only 11% require on-the-job management training and a third do not require or encourage on-the-job training at all. Furthermore, a significantly higher percentage of ARL libraries require on-the-job training than non-ARL libraries (23% vs. 7%, z-score = 2.82).

**Figure 6: On-the-Job Management Training Requirements**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-the-Job Training is Required</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>On-the-Job Training is Encouraged</td>
<td></td>
<td>102</td>
</tr>
<tr>
<td>On-the-Job Training Participation is Neither Required nor Encouraged</td>
<td></td>
<td>61</td>
</tr>
</tbody>
</table>

Library administrators were also asked about the types of on-the-job management training their library provides for department heads. Apparently a third of libraries are not requiring or encouraging on-the-job management training because they do not provide any on-the-job management training, as shown in Figure 7. Those that do provide on-the-job management training offer a mixture of mostly mentorship programs, formally structured in-house training programs in management skills, and other types of on-the-job training. It should also be noted that the only significant difference between ARL libraries and larger libraries in comparison to non-ARL libraries and smaller libraries is that a higher proportion of the former provide formally structured in-house training programs. The difference between larger and smaller libraries is 32% compared to 16% (z-score = 2.29). The difference between ARL libraries and non-ARL libraries is 45%
compared to 16% (z-score = 3.71). Thus, nearly half of all ARL libraries provide formally structured on-the-job training programs.

**Figure 7: On-the-Job Training Provided by Libraries to Department Heads**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>My library does not conduct on-the-job management training for current department heads</td>
<td>51</td>
<td>34%</td>
</tr>
<tr>
<td>Mentorship arrangements where senior administrators mentor department heads</td>
<td>55</td>
<td>37%</td>
</tr>
<tr>
<td>Shadowing programs where department heads shadow a senior administrator as they perform similar management tasks</td>
<td>9</td>
<td>6%</td>
</tr>
<tr>
<td>A formal in-house training program in management skills</td>
<td>38</td>
<td>25%</td>
</tr>
<tr>
<td>Other on-the-job training arrangements</td>
<td>43</td>
<td>29%</td>
</tr>
</tbody>
</table>

Finally, library administrators were also asked about their libraries’ efforts to develop the management skills and potential of lower level librarians. All together, 56% of the library administrators indicated that their library had a formal or informal policy of identifying lower level librarians with management potential and helping those librarians develop their management skills. Perhaps unsurprisingly, significantly higher proportions of ARL and larger libraries reported having these policies compared to non-ARL and smaller libraries. The difference between the number of administrators who reported having these policies at ARL libraries versus non-ARL libraries was 79% compared to 47% (z-score = 3.60). The difference between larger libraries and smaller libraries was 67% compared to 46% (z-score = 2.65). Figure 8 shows the methods that libraries with such policies use to identify lower level librarians who have management potential.

Finally, administrators report offering identified lower level librarians support for formal
management training through financial assistance or release time in roughly the same proportions as the support they offer to current department heads, meaning that most identified lower level librarians receive both financial assistance and paid time-off to participate in formal management training.

Figure 8: Methods Used to Identify Lower Level Librarians with Management Potential

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily contact with lower level librarians</td>
<td>74</td>
<td>83%</td>
</tr>
<tr>
<td>Department or unit heads identify librarians with potential</td>
<td>71</td>
<td>80%</td>
</tr>
<tr>
<td>Through committee activities</td>
<td>64</td>
<td>72%</td>
</tr>
<tr>
<td>Using information from annual evaluation forms</td>
<td>54</td>
<td>61%</td>
</tr>
<tr>
<td>Personnel librarians identify librarians with potential</td>
<td>23</td>
<td>26%</td>
</tr>
<tr>
<td>Other methods</td>
<td>7</td>
<td>8%</td>
</tr>
</tbody>
</table>

Sub-question 4: What attitudes do library administrators and middle managers have towards management preparation, training, and development, and what methods do they believe to be most effective in developing employees into managers?

In the context of Sub-question 4, library administrators were asked to indicate their agreement or disagreement with several statements about the importance of management experience, development, and training for both newly hired and current department heads. For each statement, administrators were asked whether they strongly agreed, agreed, neither agreed nor disagreed, disagreed, or strongly disagreed. For the purposes of this section, the strongly agreed and agreed responses were combined to
demonstrate administrators' overall agreement with the discussed statements. (Please see Appendix A for a complete breakdown of administrator responses to each statement). First, administrators were presented with several statements about the importance of various management qualifications for newly hired department heads. They were also asked whether their library listed these qualifications as required or preferred qualifications when advertising open department head positions.

Administrators were first asked whether they agreed with the following statement: “It is important for a new department head at my library to have previously served as a department head at another library or in another department at my library.” Only 16% of administrators stated that they strongly agreed or agreed with this statement. However, Figure 9 shows that over half of the respondent administrators still list previous experience as a department head as a preferred qualification when advertising department head jobs, and a few even list such experience as a required qualification. Interestingly, significantly more non-ARL libraries list previous experience as a department head as a required or preferred qualification than ARL libraries (63% vs. 43%, z-score = 2.29).

**Figure 9: Is Previous Experience as a Department Head a Listed Job Qualification?**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it is a required qualification</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Yes, it is a preferred qualification</td>
<td></td>
<td>87</td>
</tr>
<tr>
<td>No, it is not listed as a qualification</td>
<td></td>
<td>68</td>
</tr>
</tbody>
</table>

The next statement presented to administrators read as follows: “It is important for a new department head at my library to have on-the-job management experience in a lesser role prior to becoming a new department head.” A lesser role was defined as an
acting department head position, an assistant department head position, or a unit head or team leader position. Overall 68% of administrators either strongly agreed or agreed that such experience was important for new department heads to possess, although a significantly higher percentage of non-ARL librarians disagreed in comparison to ARL librarians (14% vs. 0%, z-score = 2.62). Figure 10 shows that an even higher percentage of libraries (82%) list such experience as a preferred or required qualification in department head job postings, with a significantly higher percentage of larger libraries listing such experience as a preferred qualification than smaller libraries (92% vs. 74%, z-score = 3.00).

**Figure 10: Is Experience in a Lesser Management Role a Listed Job Qualification?**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it is a required qualification</td>
<td></td>
<td>31</td>
</tr>
<tr>
<td>Yes, it is a preferred qualification</td>
<td></td>
<td>101</td>
</tr>
<tr>
<td>No, it is not listed as a qualification</td>
<td></td>
<td>28</td>
</tr>
</tbody>
</table>

The third statement presented was: “For new department heads that do not have previous experience in a management position with all the attendant management duties, it is important for those new department heads at my library to have some supervisory experience prior to becoming a new department head.” An overwhelming majority of 87% of administrators either strongly agreed or agreed with this statement. Also, Figure 11 shows that 95% of libraries list previous supervisory experience as a preferred or required qualification for a new department head job.
Figure 11: Is Previous Supervisory Experience a Listed Job Qualification?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it is a required qualification</td>
<td>69</td>
<td>43%</td>
</tr>
<tr>
<td>Yes, it is a preferred qualification</td>
<td>83</td>
<td>52%</td>
</tr>
<tr>
<td>No, it is not listed as a qualification</td>
<td>7</td>
<td>5%</td>
</tr>
</tbody>
</table>

Next, to see how the importance of management experience compares to the importance of general academic librarianship experience, administrators were asked whether they agreed or disagreed with the following statement: “It is important for new department heads at my library to have general academic librarianship experience, though not necessarily in a management or supervisory position, prior to becoming a new department head.” In total, 81% of administrators said they strongly agreed or agreed with this statement. It is important to note that a slightly larger percentage of administrators (87%) agreed that previous supervisory experience is important than agreed that general academic librarianship experience is important, while 13% fewer administrators agreed that previous management experience in a lesser role is important than agreed that general academic librarianship experience is important. Administrators were asked more directly whether previous management experience or previous experience in a similar department was more important when hiring a new department head. Figure 12 shows that the majority considers both types of experience to be equally important, while 14% consider management experience more important than departmental experience.
Figure 12: Importance of Management versus Departmental Experience

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both types of experience are equally important</td>
<td>99</td>
<td>62%</td>
</tr>
<tr>
<td>Previous experience in a similar department is more important</td>
<td>39</td>
<td>24%</td>
</tr>
<tr>
<td>Previous management experience is more important</td>
<td>22</td>
<td>14%</td>
</tr>
</tbody>
</table>

Figure 13 shows the proportion of libraries that require or prefer general academic library experience in department head candidates. Almost all libraries list this experience as a required or preferred qualification. On average, the libraries ask for 3.5 years of general academic librarianship experience. Thus, departmental and management experience are equally important, but general academic librarianship is listed as a preferred or required qualification for a department head job by a much higher proportion of libraries. Still, previous supervisory experience and general academic librarianship experience are listed as qualifications in equal proportions.

Figure 13: Is General Academic Librarianship Experience a Listed Job Qualification?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it is a required qualification</td>
<td>76</td>
<td>48%</td>
</tr>
<tr>
<td>Yes, it is a preferred qualification</td>
<td>75</td>
<td>47%</td>
</tr>
<tr>
<td>No, it is not listed as a qualification</td>
<td>7</td>
<td>4%</td>
</tr>
</tbody>
</table>

Next, administrators were asked about the importance of new department heads having previous management training. First, they were asked whether they agreed that: “It is important for a new department head at my library to have participated in formal management training, beyond a basic management class taught in library school, prior to
becoming a new department head.” Administrators did not feel that previous formal management training was as important as various types of experience. In fact, only 19% of administrators strongly agreed or agreed that previous participation in formal management training was important. Additionally, only 14% of libraries list previous participation in formal management training as a required or preferred qualification, with only 1% saying it was a required qualification.

Secondly, administrators were presented a statement about previous on-the-job management training that read as follows: “It is important for a new department head at my library to have participated in on-the-job management training prior to becoming a new department head.” More strongly agreed or agreed with this statement than with the formal management statement. Still, only 37% agreed, far less than half. Only 24% list previous participation in on-the-job management training as a required or preferred qualification, with only 3% requiring such a qualification. Clearly, administrators find management and supervisory experience much more important than previous management training when examining applicants for department head jobs.

Qualifications for department head jobs were also examined in the department head survey, though in a more general manner than in the administrator survey. Department heads were asked whether previous management experience in general and whether previous management training in general were required or preferred qualifications for both their first department head job and their current department head job (if it was not their first such job). Figure 14 and Figure 15 present the respective answers about previous management experience. These two figures show that previous management experience is indeed important to administrators when they are seeking to
higher a new department head. Two-thirds of department heads faced a required or preferred qualification for previous management experience when obtaining their current job. The importance of previous management experience has also been growing recently. The proportion of department heads who faced a requirement of previous management experience when competing for their current job is significantly higher than the proportion who faced such a requirement when competing for their first job as a department head (37% vs. 14%, z-score = 5.10).

Figure 14: Was Previous Management Experience a Qualification for your First Job as a Department Head?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it was required</td>
<td>16</td>
<td>14%</td>
</tr>
<tr>
<td>No, but it was a preferred qualification</td>
<td>37</td>
<td>32%</td>
</tr>
<tr>
<td>No, it was neither a required nor a preferred qualification</td>
<td>49</td>
<td>43%</td>
</tr>
<tr>
<td>I don’t remember</td>
<td>13</td>
<td>11%</td>
</tr>
</tbody>
</table>

Figure 15: Was Previous Management Experience a Qualification for your Current Job as a Department Head?

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it was required</td>
<td>94</td>
<td>37%</td>
</tr>
<tr>
<td>No, but it was a preferred qualification</td>
<td>71</td>
<td>28%</td>
</tr>
<tr>
<td>No, it was neither a required nor a preferred qualification</td>
<td>64</td>
<td>25%</td>
</tr>
<tr>
<td>I don’t remember</td>
<td>25</td>
<td>10%</td>
</tr>
</tbody>
</table>
Figure 16 and Figure 17 present the respective answers about previous management training participation. These two figures show that previous management training has never been listed by many libraries as a required or preferred qualification in department head job announcements. Additionally, the proportion of department heads who faced such qualifications has not significantly changed from when librarians obtained their first department head jobs to when they started their current jobs.

**Figure 16: Was Previous Management Training a Qualification for your First Job as a Department Head?**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it was required</td>
<td>7</td>
<td>6%</td>
</tr>
<tr>
<td>No, but it was a preferred qualification</td>
<td>22</td>
<td>19%</td>
</tr>
<tr>
<td>No, it was neither a required nor a preferred qualification</td>
<td>69</td>
<td>61%</td>
</tr>
<tr>
<td>I don’t remember</td>
<td>16</td>
<td>14%</td>
</tr>
</tbody>
</table>

**Figure 17: Was Previous Management Training a Qualification for your Current Job as a Department Head?**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, it was required</td>
<td>22</td>
<td>9%</td>
</tr>
<tr>
<td>No, but it was a preferred qualification</td>
<td>59</td>
<td>23%</td>
</tr>
<tr>
<td>No, it was neither a required nor a preferred qualification</td>
<td>142</td>
<td>56%</td>
</tr>
<tr>
<td>I don’t remember</td>
<td>30</td>
<td>12%</td>
</tr>
</tbody>
</table>

Administrators were also asked to agree or disagree with two similar statements that had to do with management training for current department heads. The first statement said: “It is important for current department heads to participate in ongoing formal
management training.” A total of 71% of the administrator respondents strongly agreed or agreed that it is important for current department heads to participate in ongoing formal management training. The second statement read: “It is important for current department heads to participate in ongoing on-the-job management training.” A total of 76% of the administrators strongly agreed or agreed that on-the-job management training participation is important for current department heads. In the eyes of administrators, participation in management training is clearly more important for current department heads than for department head applicants.

Finally, both department heads and administrators were asked what management training methods and experiences they thought were particularly effective in helping librarians develop their management skills and capacity. Figure 18 presents the opinions of department heads on this matter by showing what proportion of the responding department heads chose certain methods as being particularly effective. Figure 18 shows that almost all department heads have found at least some management training methods to have been effective at helping them develop their management skills. Only 6% did not find any methods to be particularly effective. Management workshops and seminars were identified as effective vehicles for management development by the most department heads, followed closely by experiences while serving on committee assignments. Task force assignments, special projects, and mentorship from senior administrators were also identified as effective management development methods by around half of the respondents. Finally, common responses in the “Other” category included reading the professional management literature, attending leadership institutes, and communicating with and observing local and national colleagues in similar management positions.
### Figure 18: Effective Management Training Methods as Identified by Department Heads

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management workshops or seminars</td>
<td>170</td>
<td>69%</td>
</tr>
<tr>
<td>Committee assignments</td>
<td>151</td>
<td>61%</td>
</tr>
<tr>
<td>Special Projects</td>
<td>133</td>
<td>54%</td>
</tr>
<tr>
<td>Mentorship from senior administrators</td>
<td>120</td>
<td>49%</td>
</tr>
<tr>
<td>Task force assignments</td>
<td>119</td>
<td>48%</td>
</tr>
<tr>
<td>A formal in-house training program in management skills</td>
<td>36</td>
<td>15%</td>
</tr>
<tr>
<td>Job rotation</td>
<td>23</td>
<td>9%</td>
</tr>
<tr>
<td>Shadowing senior administrators</td>
<td>19</td>
<td>8%</td>
</tr>
<tr>
<td>Obtaining a 2nd Masters degree in a management field, such as a MBA or MPA degree</td>
<td>16</td>
<td>6%</td>
</tr>
<tr>
<td>Classes in business or public administration programs (without obtaining a 2nd Masters degree)</td>
<td>15</td>
<td>6%</td>
</tr>
<tr>
<td>Management internships or fellowships</td>
<td>11</td>
<td>4%</td>
</tr>
<tr>
<td>Additional management classes at a library school beyond a basic management class</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td>Other methods</td>
<td>46</td>
<td>19%</td>
</tr>
<tr>
<td>No methods have proven to be particularly effective</td>
<td>14</td>
<td>6%</td>
</tr>
</tbody>
</table>

To further gauge whether department heads found formal management training classes, workshops and internships helpful, a separate survey question asked department heads whether they have implemented ideas they learned during formal management training. Figure 19 shows that 87% have implemented at least some of the ideas they have learned from formal management classes. Thus, department heads tend to think the
formal management training they have participated in has provided at least some useful knowledge they could utilize to be better managers.

**Figure 19: Have You Implemented Ideas Learned from Formal Training?**

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally Yes</td>
<td>92</td>
<td>40%</td>
</tr>
<tr>
<td>Somewhat</td>
<td>107</td>
<td>47%</td>
</tr>
<tr>
<td>Generally No</td>
<td>29</td>
<td>13%</td>
</tr>
</tbody>
</table>

Administrators were asked two questions about the efficacy of different management training methods. They were asked what methods seemed particularly helpful in developing current department heads into better managers and what methods seemed particularly effective in helping lower level librarians develop their management skills and potential. The answers to the two questions were almost identical, so the means of the responses to the two questions were calculated and are presented in Figure 20. The only method that was marked in statistically different proportions from the department head to lower level librarian questions was the mentorship method. Significantly more administrators felt that mentorship was effective for lower level librarians than felt that mentorship was effective for current department heads (61% vs. 44%, $z$-score = 2.99).
Figure 20: Effective Management Training Methods as Identified by Administrators

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Committee assignments</td>
<td>131</td>
<td>85%</td>
</tr>
<tr>
<td>Special Projects</td>
<td>128</td>
<td>83%</td>
</tr>
<tr>
<td>Management workshops or seminars</td>
<td>122</td>
<td>79%</td>
</tr>
<tr>
<td>Task Force Assignments</td>
<td>119</td>
<td>77%</td>
</tr>
<tr>
<td>Mentorship arrangements</td>
<td>81</td>
<td>52%</td>
</tr>
<tr>
<td>A formal in-house training program in management skills</td>
<td>32</td>
<td>21%</td>
</tr>
<tr>
<td>Classes in business schools or public administration programs</td>
<td>29</td>
<td>19%</td>
</tr>
<tr>
<td>Job rotation</td>
<td>28</td>
<td>18%</td>
</tr>
<tr>
<td>Management internships or fellowships</td>
<td>26</td>
<td>17%</td>
</tr>
<tr>
<td>Shadowing programs</td>
<td>15</td>
<td>9%</td>
</tr>
<tr>
<td>Additional management classes at a library school beyond a basic management class</td>
<td>10</td>
<td>6%</td>
</tr>
<tr>
<td>Other methods</td>
<td>14</td>
<td>9%</td>
</tr>
<tr>
<td>No methods have proven to be particularly effective</td>
<td>13</td>
<td>8%</td>
</tr>
</tbody>
</table>

Figure 20 shows that almost all administrators, like their department head counterparts, found at least some management training methods to have been effective at helping department heads and lower level librarians develop their management skills.

Furthermore, by comparing Figures 18 and 20, it becomes clear that there are similarities in the methods that got the most votes from both department heads and administrators, but it is also clear that administrators are more optimistic about the effectiveness of almost all of the training methods covered. For administrators, the top five effective methods, as judged by the proportion of administrators selecting each method, were committee assignments, special projects, management workshops and seminars, task
force assignments, and mentorship arrangements. These five methods were also the top five methods identified by department heads, although in a slightly different order. At the same time though, a significantly higher proportion of administrators than department heads found nine out of the eleven training methods listed in Figure 20 to be effective. The only methods that administrators and department heads agreed upon were mentorship arrangements and shadowing programs. Otherwise, administrators have more faith that the training methods discussed are effective. The difference between the responses of administrators and department heads could possibly be caused by a greater familiarity with all the different training methods amongst the administrator group. Finally, answers in the “Other” category for Figure 20 included attending leadership institutes, participating in management discussion groups, and participating in management training sessions provided by the university-wide human resources office.

**Discussion**

This study was partly modeled on a study published in 1992 that was conducted by Wittenbach, Bordeianu, and Wycisk to examine the management preparation and development of department heads in ARL libraries. The methodology of this study closely followed the methodology of the 1992 study, but it also expanded the subject pool to librarians beyond those working in ARL libraries. Wittenbach et al. began their article by stating “The experience of many librarians, as recorded in the library literature, indicates that the library profession does not assign sufficient importance to management training for librarians” (1992, p. 319). As described in the literature review, the authors reach mixed conclusions about whether that opening statement was true or not. The
department heads surveyed for that study did not possess much formal management training before they first became department heads, and libraries were not requiring or encouraging management training to a large extent. But, most department heads had at least some management experience in a lower level role, such as a unit head position, and they were acquiring formal management training once they had assumed their roles as middle managers.

This study’s literature review determined that it has been thought for some time that middle managers in academic libraries should be well trained and prepared in the discipline of management. The literature also established that the need for academic librarians well versed in the art and science of management has only grown more urgent over the last decade. It is important to know whether the state of management preparation, training, and development for academic library middle managers has improved, remained static, or even declined over the past twenty years. Thus, this section will examine the results of the current study generally and discuss how these results compare to those of the Wittenbach et al. study, in order to determine what changes have occurred.

*Sub-question 1:* What management preparation, training, and development did current middle managers in academic libraries receive before becoming middle managers?

Management training and development prior to the first department head job has improved slightly since the 1992 Wittenbach et al. study, but the total picture on management training before becoming a manager remains mixed. Looking at formal training prior to the first department head job, respondents in this study averaged 4.2
formal management classes, workshops, etc., prior to starting their first job as a
department head. Respondents in the Wittenbach et al. study averaged 3.2 formal classes,
workshops, etc., prior to their first middle management job, a full class less than
respondents in the current study. Furthermore, 64% of department heads participating in
the current study had taken part in at least one type of formal management training
beyond library school management courses prior to their first department head job. In the
Wittenbach et al. study, only 5.5% of respondents had classroom training beyond library
school and only 48% had management workshop training prior to becoming a department
head for the first time. Thus, a significantly higher proportion of department heads in the
current study had participated in formal management training before becoming a middle
manager, demonstrating improvement in this area since 1992 (z-score = 2.52).

However, the fact remains that even though the outlook has improved in this area,
a full 36% of current department heads had either no formal management training at all
or no formal management training beyond classes in library school before their first
department head job. Additionally, when this study examined the participation of middle
managers in on-the-job management training prior to their first department head job, the
situation was worse than that of formal management training. Only 42% of respondents
in the current study had participated in any on-the-job management training prior to their
first middle management job. A comparison to 1992 in this category is not possible
because the Wittenbach et al. study did not look at the same types of on-the-job training
as the current study. But, the analysis in this study showed that there has not been a
significant change in previous on-the-job training in the past few decades. However, and
more encouragingly, when formal and on-the-job training were considered together, 81%
of department heads had at least some sort of management training beyond library school before starting as a middle manager. But, that does still leave a fifth of current department heads without any management training beyond library school before their promotion to the level of middle management.

When it comes to previous management experience in some other role prior to becoming a department head, the Wittenbach et al. cohort and the cohort for this study were somewhat similar. Participants in the Wittenbach et al. study had a mean of 3.24 years of management experience in other roles and 78.5% of the respondents had some sort of previous management experience. The numbers for the current study were a mean of 3.48 years of experience and a proportion of 69% of respondents possessing management experience in another role. The current proportion is significantly lower than the 1992 proportion overall (z-score = 2.13). But, the 1992 sample only contained ARL librarians. The proportion of ARL librarians in the current study with previous management experience was 75%, which is essentially equal to the 1992 proportion. Thus, the more concerning figure is the 60% of non-ARL department heads who do not obtain any management experience at a lower level before becoming a middle manager.

Overall, 87% of current department heads have had some form of management training or experience after graduating library school but prior to becoming a department head. Additionally, more current department heads have participated in formal management training prior to their first department head jobs than during the time of the Wittenbach et al. study, and they have taken more formal classes on average. That is the positive side of the answer to Sub-question 1. However, 13% of current department heads had no management training or experience outside of library school before becoming
department heads, fewer department heads have previous management experience in other roles than in 1992, at least a third of current department heads still had no formal training since library school before becoming a department head, and many department heads only had training or experience but not both.

The proportion of department heads without formal training prior to becoming middle managers is troubling because, as Wittenbach et al. stated, “Despite the lack of clarity in the use of the term experience, much of the research points to its value in addition to management education and training. Seldom is experience viewed as sufficient in itself” (1992, p. 321). McClure also placed the cause of poor managerial performance in libraries at the feet of a deficit in formal management training (1980, p. 2389). Training in library school is not enough, because what is learned in one management class is not sufficient knowledge to manage a department and is often forgotten before one is in a position to manage a department.

On the other hand, Gazan argued that training without experience is not ideal either (2007, p.245). It is heartening that more librarians are seeking formal management training prior to moving up the ranks than in the past, but it would be most helpful if future managers combined more extensive formal training with mentorship or in-house training and performed some management functions in other roles before assuming the role of a middle manager. The answers to Sub-question 1 show the academic librarian profession still has a way to go before reaching that ideal point. Admittedly, the possible pending shortage of librarians with middle management training and experience may make achieving that ideal an even tougher task. A concerted effort throughout the profession would be needed to ensure that larger proportions of new middle managers
receive both training and hands-on management experience before moving up to middle management. Nevertheless, these issues can be mitigated if department heads consistently participate in management training once they have become a middle manager.

Sub-question 2: What ongoing management preparation, training, and development have current middle managers participated in since becoming middle managers?

Thankfully, the results for Sub-question 2 showed that more department heads participate in formal and on-the-job training once they have reached the level of middle manager than do so before becoming a department head. Department heads in academic libraries show a concerted drive to obtain formal training once they reach the top of a department. In the current study, 87% of current department heads had participated in at least one type of formal management training since becoming a department head, while only 64% had done so after leaving library school but before becoming a department head. The respondents in the current study have taken a mean of 5.31 formal management classes or workshops while serving as department heads, making for an average of about a class or workshop every other year. Unfortunately, these numbers mark a slight regression since the time of the Wittenbach et al. study, when an equally large proportion of 87% of department heads were averaging a management class or workshop nearly every single year, for a total mean of 5.98 formal courses for those respondents while they were serving as department heads.

There is some hope found in the fact that this study’s results showed that department heads who began their first department head jobs since 2003 are taking significantly more ongoing management training classes and workshops per year than
those who started as heads before 2003. The newly minted department heads have been taking more than a class a year, meaning that department heads with less middle management experience are serious about countering that lack of experience with formal training in management techniques and skills. However, the digital revolution means that academic libraries are facing great changes in the ways they operate and the services they offer. Additionally, new technologies aimed at helping managers to be more efficient and effective are being introduced every year. The reality is that even highly experienced managers need to continue to pursue formal management training in order to keep up with the changes that are occurring, to be able to manage the new technologies that are being introduced, and to help keep their library services relevant.

The current study also found that a significantly higher proportion of department heads participated in on-the-job management training once at the middle management level than had participated in on-the-job training prior to becoming the head of a department (53% vs. 42%, z-score = 2.45). However, the data still show that barely half of all department heads are receiving on-the-job management training. But, most of those who have not received on-the-job management training have at least received some formal management training. Only 4.5% of respondents had not participated in any formal or on-the-job management training since becoming a department head.

Overall, it is a welcome result that most department heads are participating in ongoing formal management training, ongoing on-the-job management training, or both. Still, the ideal situation would have department heads taking the same number of, or more, continuing management education classes and workshops than they did in 1992. It would also be best if more department heads were participating in on-the-job training to
augment what they were learning in more formal settings. A look at the requirements libraries have for ongoing training and the support they provide for such training can further illuminate the patterns of department head participation in ongoing training.

**Sub-question 3:** How are the administrations of academic libraries supporting the preparation, training, and development of their employees in the area of management?

When examining the results related to Sub-question 3, it is important to remember that responses from department heads and administrators were combined to see which libraries require and support which types of ongoing training. In 1992, Wittenbach et al. had asked just department heads whether their libraries supported their participation in formal management training and learned that 77% of department heads received financial assistance and 85% were given release time from their job duties to participate in ongoing formal management training. So, academic libraries have always been supportive of ongoing management training. The results from the current study show that library administrations are slightly more supportive of ongoing training now, with 82% of department heads receiving financial assistance, 88% receiving release time, and 76% receiving both financial assistance and release time. All in all, library administrations are doing a good job of supporting continued formal training.

The story is a little bit different though when it comes to requiring and encouraging ongoing formal management training. Currently, only 8% of academic libraries overall require their middle managers to attend formal ongoing training. There were significant differences between ARL and non-ARL libraries in this area though. Currently, 19% of ARL libraries require ongoing formal management training, which is
up from the 14.5% of ARL libraries recorded by Wittenbach et al. So, slightly more ARL libraries require ongoing formal training than in 1992, but barely any non-ARL libraries make such requirements of their middle managers. Additionally, the current study found that 65% of all libraries and 75% of ARL libraries either require or encourage ongoing formal training, whereas only 54% of ARL libraries required or encouraged this training in 1992 according to Wittenbach et al. So improvements have been made since 1992 in terms of libraries promoting ongoing management training among their department heads.

On the other hand, with so many libraries offering support to department heads who pursue formal management training, more libraries should be requiring this training. Wittenbach et al. found that requirements of ongoing management training lead to statistically significant higher rates of participation. Even when support is offered, participation is lower without a requirement to participate. If the support is there, a requirement to undertake formal management training is not overly burdensome on department heads. Nevertheless, encouraging department heads to take formal management training classes does not hurt either, and it is not known why more libraries are not encouraging such training. There is no reason why 100% of academic libraries cannot at least encourage participation in formal management training.

A similar percentage of libraries (66%) require or encourage on-the-job training, with 11% of that total requiring on-the-job training. Once again, a significantly higher proportion of ARL libraries require on-the-job training than non-ARL libraries, but still only about a quarter of ARL libraries follow this practice. Since 34% of libraries do not offer on-the-job management training, the proportions requiring or encouraging such
training is not surprising. On the other hand, given the reasonableness of Howze’s statement that, “Libraries can and must respond to the shortage of qualified leaders by establishing training programs and encouraging continuing education in management studies” (2003, p. 31), and given that several other practitioners and authors have made similar declarations, it would be encouraging to see more libraries offering at least mentorship opportunities, if not more formally structured management training programs. Additionally, given that it will be harder to recruit middle managers from other libraries (Curran, 2003, p. 135) and it may be unwise to recruit middle managers from other professions (Unaeze, 2003, p. 114-15), it will be necessary in the future for more academic libraries to develop their own middle managers from within (Sullivan 1992, p. 279; Mosley 2004, p. xii). Currently, 56% of all libraries, 79% of ARL libraries, and 67% of larger libraries have policies of identifying lower level librarians who have the potential to become effective managers in the future and helping those librarians to develop their management abilities. So, many libraries do recognize the impending necessity of developing their own management talent pool, but these proportions could stand to be even higher.

Before concluding this section, the discrepancies between the responses of department heads and administrators in terms of the requirement, encouragement, and/or support of ongoing management training must be mentioned once more. In dozens of cases where several respondents from the same library answered the questions related to Sub-question 3, the answers from one respondent to the next were contradictory. Often, these internal disagreements saw administrators claim that ongoing training was encouraged at their library while department heads claimed that ongoing training was
neither required nor encouraged. At any rate, these disagreements indicate that policies surrounding ongoing management training need to be more clearly stated, and library administrators may want to revisit how vocally they are actually encouraging department heads to participate in ongoing training.

Overall, ARL libraries have been leading the way in increasing their requirements, encouragement, and support for ongoing management training. However, significant numbers of non-ARL libraries are also encouraging and supporting ongoing training. On the other hand, even among ARL libraries, only a minority of libraries require continuing formal or on-the-job management training participation from their department heads. ARL libraries are doing the most in terms of helping to develop the next generation of middle managers. However, all sub-groups of academic libraries will need to increase these efforts even further to stay competitive in the information sector and avert the potential negative consequences of an upcoming shortage of librarians prepared and qualified to serve as middle managers. A discussion of the opinions of academic librarians toward the importance of management experience and training can help explain the results seen in the first three sub-questions and clarify which training methods administrators and department heads think are helping to create effective middle managers within academic libraries.
Sub-question 4: What attitudes do library administrators and middle managers have towards management preparation, training, and development, and what methods do they believe to be most effective in developing employees into managers?

The results for Sub-question 4 showed that healthy majorities of library administrators agree that previous management or supervisory experience is an important prerequisite for becoming a new department head at their library. Some administrators even went so far as to say that previous experience as a department head was an important prerequisite for becoming a new department head at their library. These administrators also reported putting these beliefs into action when advertising department head vacancies. Over half of respondent administrators report listing previous department head experience as a preferred or required qualification for these jobs. Many more list management experience in a lesser role and supervisory experience as qualifications they want new department heads to possess.

The results also show that more libraries are currently listing management experience as a required or preferred qualification for department head positions than did so in the past. Wittenbach et al. found that 45% of the department heads they surveyed faced requirements or preferences for previous management experience or training when they obtained their first department head job. According to current library administrators, 82% of libraries want their new department heads to have previous management experience, which is nearly double the proportion reported in 1992. Furthermore, 65% of department heads participating in the current study reported that they faced requirements or preferences for previous management experience when obtaining their current job, as opposed to only 46% who faced similar requirements and preferences when obtaining
their first jobs. Undoubtedly, library administrators place more value on recruiting
department heads with previous management experience than they did in the past.

Indeed, in terms of hiring new department heads, previous supervisory experience
was given equal status to previous general experience in academic librarianship, and a
majority of administrators stated previous management experience and previous
experience in a similar functional department were equally important. These results are
encouraging in the sense that they demonstrate academic library administrators
understand that department heads need to be both experienced as managers and
experienced as librarians. In their 1992 study, Wittenbach et al. hypothesized that
departmental experience, rather than management experience or training, was the
determining factor in whether academic librarians obtained jobs as middle managers at
the head of a department. They ended up having to reject their hypothesis for lack of
evidence to support it (1992, p. 328). The current study results corroborated that
conclusion. Ultimately, if academic librarians are ending up in middle management
positions without previous management experience, it is not because academic library
administrators are ignoring the need for such experience.

However, several caveats to this positive assessment need to be discussed at this
point. First, it would certainly be preferable to hire new department heads who have
already served in a middle management position previously. But if projected retirement
trends come to fruition and Curran’s contention that academic libraries will face a great
shortage of qualified middle management talent is correct, then administrators seeking
department head candidates who have already served as middle managers may end up
being disappointed. One can hope for the best during a department head search, but
requirements and preferences for supervisory experience and experience in a lesser management role are probably more realistic for most academic libraries. However, the second caveat is that previous supervisory experience and previous management experience are not one in the same. Administrators almost unanimously agree that previous supervisory experience is important, and almost all of them ask for such experience from department head candidates. The number of administrators valuing previous management experience as important and listing such experience in position announcements is encouraging, but it does not match the numbers for supervisory experience. Being an effective department head entails more than just managing people effectively. Department heads must also be able to formulate strategic plans, manage budgets, coordinate workflows, guide projects, manage technology, and organize the structure of their departments. People skills are essential, but technical management skills are equally critical to success in managing a department.

The third caveat is that management experience is valuable in addition to training, but is often not sufficient without training. Only a minority of administrators indicated that they thought it was important for new department heads to have participated in formal or on-the-job management training prior to becoming a department head, and most academic libraries do not even list management training as a preferred qualification. Academic librarians are not expected to know everything about librarianship the first day on the job. Instead, they are expected to become better librarians by learning on the job and to personally devote themselves to professional development. However, for the most part, potential academic librarians are not deemed qualified to even begin that process of self-discovery in a librarianship career until they have gone through one to two years of
classroom instruction and obtained an MLS. This standard exists because the profession recognizes that librarianship is a science that deserves practitioners who have received instruction from scholars, experts, and more experienced practitioners. It is time to recognize that the management aspect of being a department head deserves the same respect. Management is also a long-studied science that deserves practitioners who have received instruction from scholars, experts, and more experienced practitioners. Experience and experimentation in other management roles simply means that a librarian has tried being a manager. Although this experience is helpful, it does not ensure that librarians with such experience have learned or been taught the most effective management strategies and techniques from those who have been successful managers and extensively studied successful management practices. Greater importance should be placed on ensuring that librarians have been trained to be managers before they are hired to manage whole departments.

Thankfully though, a great majority of administrators do agree that it is important that current department heads participate in both formal and on-the-job management training on a continuing basis. The results of Sub-question 3 even showed that many library administrations are committed to training some of their lower level librarians in management skills to prepare them for middle management. Thus, administrators do recognize that management experience is not enough in and of itself. Nothing in the results indicates that the importance of management training and development as a complement to management experience is lost on academic library administrations. However, some adjustment in the views of when it is most important for that training to begin could help avert a potential shortfall in middle management expertise in coming
years and ensure that department heads are prepared to manage from day one in their jobs as middle managers.

Finally, department heads and library administrators definitively agreed on what the best training methods and experiences are for helping librarians become effective managers. Both groups picked the same five methods more than other methods as being particularly effective in helping librarians effectively develop their management skills: management workshops and seminars, committee assignments, task force assignments, special projects, and mentorship from department heads and senior administrators. These results were reassuring for two main reasons. First, they show that administrators are likely to encourage and require management training methods that department heads and other librarians are likely to find worthwhile and helpful. Second, they show that both administrators and department heads believe the best overall set of management training and development methods includes formal training, on-the-job training, and experiential learning opportunities. To that extent, administrators and department heads agree with the scholars discussed in the literature review who believe that a mixture of formal training, on-the-job training, and previous experience best prepares academic librarians to serve as middle managers.

It is also worth pointing out that the correlation between the proportion of administrators and department heads marking a particular method as effective closely correlates with the proportion of department heads who participated in that particular method. This pattern indicates department heads and administrators have a tendency to think the management training and development methods they are most familiar with have been particularly effectively in helping librarians become better managers.
Additionally, a large majority of department heads reported that they have implemented management ideas they learned in formal training. It stands to reason then, that if more librarians participated in management internships, took classes at business and public administration schools, and obtained masters degrees in management fields, then more librarians would rate these formal management training methods as being effective.

**Conclusion**

Overall, the current state of management preparation, training, and development of middle managers in American academic libraries is quite strong in several areas, but lacking in some ways as well. Similarly, the current state compares favorably to the state of management preparation, training, and development in previous decades in many dimensions, while there seems to be a slight regression in other dimensions. Ultimately though, when all the evidence is considered together, those concerned about the management preparation, training, and development of middle managers in academic libraries have reason for optimism. On average, the profession has made progress in this area over the past 17 years. The majority of department heads have at least some training or management experience before heading a department, even though there are some gaps to fill. Even more new department heads make up for any preparation deficiencies by quickly seeking management training once on the job as a middle manager. They are assisted greatly in this pursuit by the generous financial and release time assistance provided by their libraries. For the most part, library administrations recognize the importance of employing middle managers who have management experience and pursue management training once on the job. Many are even seeking to develop the management
potential of their frontline professional librarians.

For the gaps that do remain, fairly straightforward and easily implemented solutions are available. More academic library administrators should recognize that it is important for librarians to participate in formal and on-the-job management training before becoming mid-level managers. If academic librarians do not pursue such training, the profession could indeed face an acute lack of prepared mid-level managers once the current leaders and managers start retiring in greater numbers. Accordingly, administrators should make it known in job advertisements that they prefer department head candidates who possess both management experience and a record of participating in formal management training. These preferences will indicate to potential middle managers that they need to pursue both management training and experience before applying for department head jobs, and thereby increase the number of librarians participating in such training. If training is a preferred qualification in the job announcement, and a suitable candidate with previous training cannot be found, other candidates can still be selected to fill the position.

Additionally, more libraries should require regular participation in formal management training from their current department heads. Academic libraries are already offering support for training, and there are innumerable options for acquiring management training, with many courses available online. Additionally, administrators and managers largely agree on the training and preparation methods that are most effective at helping librarians become better managers, so it is unlikely that managers would feel like they were being forced to take courses or workshops that they thought were not doing them any good. Consequently, administrators and middle managers
should be able to negotiate requirements for continuing formal training that are acceptable to all parties. These requirements could help reverse the decrease that has occurred since 1992 in the amount of formal training obtained by department heads each year. Finally, managers and administrators should both pay more heed to the developmental effectiveness of business and public administration classes, second master’s degrees in management disciplines, and management internships and fellowships. It appears that librarians are not giving these training avenues more attention simply because they have not participated in these opportunities much in the past and are therefore less familiar with them than with other training and development methods. Part-time and distance programs can often make these options more workable and affordable, so they should not be ignored.

Lastly, the results of this study point toward several promising avenues for further research on management training and development for middle managers in academic libraries. ARL and larger libraries are clearly offering more management training to their workers and attracting department heads who have more management experience than non-ARL and smaller libraries. Research should be done on ways to make it more feasible for smaller libraries and libraries with fewer financial resources to offer management training and support for management training to their librarians, so that they might be able to grow their own pool of experienced managers from within their own ranks. Secondly, given that so many department heads and administrators identified management workshops and seminars as effective training avenues, further research could focus on the efficacy of various workshop formats. For example, do short workshops provide for lasting improvements in management ability? Or are more in-
depth management seminars needed to make the training provided truly worthwhile?

Finally, the profession as a whole lacks concrete standards on what qualifications middle managers in academic libraries should possess and what levels of continuing management education should be required of department heads. Further research should focus on the desirability and plausibility of creating and enforcing such standards.
Works Cited


Appendix A: Full Report of Administrator Attitudes on the Importance of Management Experience and Training

Administrators were asked to indicate their level of agreement with the following statements by marking whether their opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

1) It is important for a new department head at my library to have previously served as a department head at another library or in another department at my library.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td>Agree</td>
<td>24</td>
<td>15%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>46</td>
<td>29%</td>
</tr>
<tr>
<td>Disagree</td>
<td>81</td>
<td>50%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>9</td>
<td>6%</td>
</tr>
</tbody>
</table>

2) It is important for a new department head at my library to have on-the-job management experience in a lesser role prior to becoming a new department head.

(On-the-job experience in a lesser role includes serving as an acting department head, serving as an assistant department head, or serving as a unit head/team leader)

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>31</td>
<td>19%</td>
</tr>
<tr>
<td>Agree</td>
<td>78</td>
<td>49%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>32</td>
<td>20%</td>
</tr>
<tr>
<td>Disagree</td>
<td>17</td>
<td>11%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

3) For new department heads that do not have previous experience in a management position with all the attendant management duties, it is important for those new department heads at my library to have some supervisory experience prior to becoming a new department head.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>58</td>
<td>36%</td>
</tr>
<tr>
<td>Agree</td>
<td>81</td>
<td>51%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>16</td>
<td>10%</td>
</tr>
<tr>
<td>Disagree</td>
<td>3</td>
<td>2%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>1</td>
<td>1%</td>
</tr>
</tbody>
</table>

4) It is important for new department heads at my library to have general academic librarianship experience, though not necessarily in a management or supervisory position, prior to becoming a new department head.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>70</td>
<td>44%</td>
</tr>
<tr>
<td>Agree</td>
<td>59</td>
<td>37%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>19</td>
<td>12%</td>
</tr>
<tr>
<td>Disagree</td>
<td>9</td>
<td>6%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>1</td>
<td>1%</td>
</tr>
</tbody>
</table>

5) It is important for a new department head at my library to have participated in formal management training, beyond a basic management class taught in library school, prior to becoming a new department head.

(Formal training includes additional management classes at a library school beyond a basic management class, classes in business schools or public administration programs, management workshops or seminars, and management internships or fellowships)

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>4</td>
<td>3%</td>
</tr>
<tr>
<td>Agree</td>
<td>25</td>
<td>16%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>68</td>
<td>43%</td>
</tr>
<tr>
<td>Disagree</td>
<td>60</td>
<td>38%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>3</td>
<td>2%</td>
</tr>
</tbody>
</table>
6) It is important for a new department head at my library to have participated in *on-the-job* management training prior to becoming a new department head.

(On-the-job management training includes mentorship from a department head, shadowing a department head as they perform management tasks, formal in-house training programs in management skills, or similar arrangements)

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>11</td>
<td>7%</td>
</tr>
<tr>
<td>Agree</td>
<td>48</td>
<td>30%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>61</td>
<td>38%</td>
</tr>
<tr>
<td>Disagree</td>
<td>37</td>
<td>23%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>3</td>
<td>2%</td>
</tr>
</tbody>
</table>

7) It is important for *current* department heads to participate in ongoing *formal* management training.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>39</td>
<td>25%</td>
</tr>
<tr>
<td>Agree</td>
<td>73</td>
<td>46%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>30</td>
<td>19%</td>
</tr>
<tr>
<td>Disagree</td>
<td>16</td>
<td>10%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>

8) It is important for *current* department heads to participate in ongoing *on-the-job* management training.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Responses</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>44</td>
<td>28%</td>
</tr>
<tr>
<td>Agree</td>
<td>76</td>
<td>48%</td>
</tr>
<tr>
<td>Neither Agree nor Disagree</td>
<td>31</td>
<td>20%</td>
</tr>
<tr>
<td>Disagree</td>
<td>7</td>
<td>4%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>0</td>
<td>0%</td>
</tr>
</tbody>
</table>
Appendix B: Department Head Invite Email

Hello,

My name is Michael Rooney. I am currently a Master of Library Science (MLS) student at the University of North Carolina at Chapel Hill and a Carolina Academic Library Associate at UNC’s main research library.

I would like to invite you to participate in an online survey I’m conducting as part of my Masters Paper research. I need to complete the Masters Paper requirement in order to graduate and earn my MLS, so I would greatly appreciate your assistance if you do decide to participate. The study details are as follows:

**Title of Study:** The Current State of Management Preparation, Training, and Development among Middle Manager Librarians in Academic Libraries

**IRB Study # 09-0029**

The survey will attempt to gauge how much management preparation, training, and development academic library department heads have obtained, to what extent academic libraries support management development, and which types of management development are most effective. University Librarians will be surveyed separately to determine how much importance library administrations place on developing librarians to be effective managers. The survey will ask you about your experience as a manager, what management training and development you participated in before becoming a department head, the training and development you’ve undertaken since becoming a department head, and your opinions on the most effective types of management training and development.

You have been approached because you have been identified as a permanent department head at the middle level of management within your library. If you do not consider yourself to be a department head at the middle level of management, or are serving as an interim department head, please disregard this invitation to participate.

I understand you are probably very busy fulfilling your duties as a department head, but based on average completion times in a pre-test, I expect that your participation in this survey would only take up 8 to 15 minutes of your time. The survey software will also save your progress, if you can’t complete the survey in one sitting. I expect that the results of my research will be very useful in helping librarians understand the current state of management preparation and training in academic libraries, and what that means for the effective management of academic libraries. I would be happy to share the results of my study with you when the paper is completed in April.

You can access the survey by visiting the link below. Participation in the survey is completely voluntary. The first page of the survey will explain exactly what your
participation in the survey entails and will ask you to indicate that you have given informed consent to voluntarily participate in this study.

If you need to stop in the middle of the survey, you can return to the spot you stopped at by simply returning to this email and clicking on the link above again. The survey also provides a back button on each page, allowing you to return to previous questions and change your answers. If you have any questions please reply to this email or call me on my cell phone at 703-470-6843.

Thank you very much for your time and consideration. I hope you decide to participate in the study. If you do want to participate, please complete the survey by [three weeks after invitation receipt].

**Follow this link to the Survey:** ${l://SurveyLink}

Sincerely,

Michael Rooney

The University of North Carolina at Chapel Hill  
Master of Library Science Candidate  
Carolina Academic Library Associate
Appendix C: Library Administrator Invite Email

Hello,

My name is Michael Rooney. I am currently a Master of Library Science (MLS) student at the University of North Carolina at Chapel Hill and a Carolina Academic Library Associate at UNC’s main research library.

I would like to invite you to participate in an online survey I’m conducting as part of my Masters Paper research. I need to complete the Masters Paper requirement in order to graduate and earn my MLS, so I would greatly appreciate your assistance if you do decide to participate. The study details are as follows:

**Title of Study:** The Current State of Management Preparation, Training, and Development among Middle Manager Librarians in Academic Libraries

**IRB Study # 09-0029**

The survey will attempt to gauge how much importance academic library administrations place on developing librarians to be effective managers, how they support the development of their librarians as effective managers, and which types of management development are most effective. Department heads will be surveyed separately to see how much management preparation, training, and development academic library department heads have obtained. The survey will ask you about your library’s efforts to develop librarians into effective managers, your opinions on the importance of various management experiences among department heads, and your opinions on the most effective types of management training and development.

I understand you are probably very busy fulfilling your duties as a university librarian, library director, or dean of libraries, but based on average completion times in a pre-test, I expect that your participation in this survey would only take up 10 to 15 minutes of your time. The survey software will also save your progress, if you can’t complete the survey in one sitting. I expect that the results of my research will be very useful in helping librarians understand the current state of management preparation and training in academic libraries, and what that means for the effective management of academic libraries. I would be happy to share the results of my study with you when the paper is completed in April.

You can access the survey by visiting the link below. Participation in the survey is completely voluntary. The first page of the survey will explain exactly what your participation in the survey entails and will ask you to indicate that you have given informed consent to voluntarily participate in this study.

If you need to stop in the middle of the survey, you can return to the spot you stopped at by simply returning to this email and clicking on the link above again. The survey also provides a back button on each page, allowing you to return to previous questions and
change your answers. If you have any questions please reply to this email or call me on my cell phone at 703-470-6843.

Thank you very much for your time and consideration. I hope you decide to participate in the study. If you do want to participate, please complete the survey by [three weeks after invitation receipt].

Follow this link to the Survey: $\{\text{SurveyLink}\}$

Sincerely,

Michael Rooney

The University of North Carolina at Chapel Hill
Master of Library Science Candidate
Carolina Academic Library Associate
Appendix D: Survey for Department Heads

(NB: This survey was in an online format when Department Heads completed the survey. This document only represents the order and wording of survey questions.)

The first page of the survey presented the informed consent fact sheet as follows:

Title of Study: The Current State of Management Preparation, Training, and Development among Middle Manager Librarians in Academic Libraries

IRB Study # 09-0029

Principal Investigator: Michael Rooney
Email: mikerooney@unc.edu
Phone: 703-470-6843
Faculty Advisor: Barbara Moran

Information about participation and informed consent

What are some general things you should know about research studies?
You are being asked to take part in a research study. To join the study is voluntary. You may refuse to join, or you may withdraw your consent to be in the study, for any reason, without penalty.

Research studies are designed to obtain new knowledge. This new information may help people in the future. You may not receive any direct benefit from being in the research study. There also may be risks to being in research studies.

Details about this study are discussed below. It is important that you understand this information so that you can make an informed choice about being in this research study. You should ask the researcher named above any questions you have about this study at any time.

What is the purpose of this study?
The purpose of this research study is to gauge how much management preparation, training, and development academic library department heads have obtained, to what extent academic libraries support management development, and which types of management development are most effective. University Librarians will be surveyed separately to determine how much importance library administrations place on developing librarians to be effective managers. The survey will ask you about your experience as a manager, what management training and development you participated in before becoming a department head, the training and development you’ve undertaken since becoming a department head, and your opinions on the most effective types of management training and development.
How many people will take part in this study?
If you decide to be in this study, you will be one of approximately 400 to 500 librarians in this research study.

How long will your part in this study last?
Your participation in this study consists solely of filling out the survey questionnaire. Based on pre-test results, you can expect to spend a total of 8 to 15 minutes to complete the entire questionnaire. Once you have completed the survey questionnaire, your part of the study is complete.

What will happen if you take part in the study?
If you take part in this study, you will fill out the questionnaire beginning on the next page, answering the types of questions described in the study purpose section above. You may skip any question you do not have an answer for or do not wish to answer. Your responses will be saved as you complete each page of the survey, but your responses will only be used if you complete the survey. The survey software will alert you when you have reached the end of the survey. Your participation will be complete at that time.

What are the possible benefits from being in this study?
Research is designed to benefit society by gaining new knowledge. You may also expect to benefit by participating in this study by receiving a copy of the study’s final report, which will give you an indication of the amount of management preparation and training your peers have participated in and what they believe to be effective ways to improve your management abilities.

What are the possible risks or discomforts involved from being in this study?
It is not expected that you would face embarrassment, distress or discomfort simply from filling out the questionnaire. If you do feel embarrassment, distress or discomfort from any of the questions, you are free to skip those questions or discontinue your participation in the survey. Every effort will be made to keep your responses confidential, as described in the next section. However, there is always a negligible risk that information sent over the internet could be intercepted or information stored on a computer could be accessed by an unauthorized person, despite the researcher’s best efforts to prevent such an occurrence and the great unlikelihood of such an occurrence. There may be uncommon or previously unknown risks. You should report any problems to the researcher.

How will your privacy be protected?
The only people who will have access to the answers you provide in the survey are you, through the link provided in this email and while the survey is in progress, and the principal investigator. While the survey is in progress, your answers will be stored on a secure server belonging to the Odum Institute for Research in Social Science at UNC. Only the principal investigator will have access to your answers at this time, through a password protected web account. Once the survey period has ended, the principal investigator will download all survey data to his laptop computer and remove all individual identifiers from the data set that linked you to your answers.
Participants will not be identified individually in any report or publication about this study. Although every effort will be made to keep research records private, there may be times when federal or state law requires the disclosure of such records, including personal information. This is very unlikely, but if disclosure is ever required, UNC-Chapel Hill will take steps allowable by law to protect the privacy of personal information. In some cases, your information in this research study could be reviewed by representatives of the University, research sponsors, or government agencies for purposes such as quality control or safety.

Will you receive anything for being in this study?

You will be receiving a copy of the study’s final report by email for taking part in this study, so that you may know the results of the research in which you have participated.

Will it cost you anything to be in this study?

There will be no costs for being in the study.

What if you are a UNC employee?

Taking part in this research is not a part of your University duties, and refusing will not affect your job. You will not be offered or receive any special job-related consideration if you take part in this research.

What if you have questions about this study?

You have the right to ask, and have answered, any questions you may have about this research. If you have questions, or concerns, you should contact the researcher listed above.

What if you have questions about your rights as a research participant?

All research on human volunteers is reviewed by a committee that works to protect your rights and welfare. If you have questions or concerns about your rights as a research subject you may contact, anonymously if you wish, the Institutional Review Board at 919-966-3113 or by email to IRB_subjects@unc.edu.

Participant’s Agreement:

By checking yes below and completing the survey questionnaire, you are indicating the following:

- I have read the information provided above.
- I have asked all the questions I have at this time.
- I voluntarily agree to participate in this research study.
Do you attest to the preceding and consent to participate in this research study?

___ Yes       ___ No

The body of the survey was as follows:

Header at the top of each page reads: * Remember that you may skip any question if you don't know the answer or do not want to answer. But, please try to answer each question or provide an estimate if necessary.

1. Is your current job as a library department head the first permanent position in which you have served as a department head?

(Note: Based on your response to this question, the survey may automatically skip to question 10.)

___ Yes
___ No

If yes, skip to question 10. If no, go on to question 2.

2. What year did you obtain your first job as a department head?

_____ (enter year hear)

3. When you first became a department head, what type of department were you leading?

_____ A reference department
_____ A public services department
_____ A cataloging department
_____ A technical services department
_____ Another type of department (please specify) _____________

4. What formal management training did you have prior to your first library department head job? (Please estimate the total number of courses, workshops, etc. in each applicable category)

(For example, if you took 3 management classes while in library school, enter the number 3 in the first box below. Enter 0 for categories that do not apply.)

_____ Management classes while in library school
_____ Management classes at a library school since graduating
_____ A 2nd Masters degree in a management field, such as a Master of Business Administration (MBA) or a Master of Public Administration (MPA) degree (just mark with a 1 if so)
___ Some classes in business schools or public administration programs (without obtaining a 2nd Masters degree)
___ Management workshops or seminars
___ Management internships or fellowships

5. What on-the-job management training did you participate in prior to obtaining your first job as a department head? (Please mark all that apply)

___ I did not participate in on-the-job management training prior to my first job as a department head
___ Mentorship from department heads
___ Shadowing department heads (where you actually observed them perform their management tasks)
___ A formal in-house training program in management skills
___ Other methods (please specify) _______________

6. What other management experience did you have prior to obtaining your first job as a department head? (Please estimate the number of years in each applicable position. You may use decimal places to indicate partial years. Enter 0 for positions that don’t apply.)

(For example, if you worked as an acting department head for 1 year and 6 months prior to becoming a permanent department head, enter 1.5 in the first box below. If you list multiple other positions for the fourth option below, you may enter all of the positions in the box, following each entry with the number of years in that position)

___ Acting department head position(s)
___ Assistant department head position(s)
___ Unit head/team leader position(s)
___ Other position(s) (please specify) _______________

7. Was previous management experience a required qualification for your first library department head job?

___ Yes, it was required
___ No, but it was a preferred qualification
___ No, it was neither a required nor a preferred qualification
___ I don’t remember

8. Was previous management training (formal or on-the-job) a required qualification for your first library department head job?

___ Yes, it was required
___ No, but it was a preferred qualification
___ No, it was neither a required nor a preferred qualification
___ I don’t remember
9. Before becoming a department head for the first time, how much experience did you have as a librarian in that type of department (at the same or other institutions)?

(For example, if the job was as the head of a reference department, how many years of experience did you have working in a reference department? You may use decimal places to indicate partial years)

____ (enter number of years here)

10. What year did you obtain your current job as a department head?

_____ (enter year here)

11. What management duties do you perform in your current job as a department head? (Please mark all that apply)

___ I do not perform management duties
___ Strategic planning
___ Proposing and administering the budget for your department
___ Organizing the structure of your department
___ Defining the duties of the positions in your department
___ Coordinating the work flow in your department
___ Interviewing applicants
___ Directly making hiring decisions
___ Supervising professional staff
   (If yes, please mark how many you supervise) ____
___ Supervising paraprofessional (non-librarian) staff
   (If yes, please mark how many you supervise) ____
___ Evaluating staff performance
___ Reporting to administrators
___ Other (please specify) _________

12. What formal management training did you have prior to your current library department head job? (Please estimate the total number of courses, workshops, etc. in each applicable category)

(For example, if you took 3 management classes while in library school, enter the number 3 in the first box below. Enter 0 for categories that do not apply.)

___ Management courses while in library school
___ Management courses at a library school since graduating
___ A 2nd Masters degree in a management field, such as a Master of Business Administration (MBA) or a Master of Public Administration (MPA) degree (just mark with a 1 if so)
___ Some classes in business schools or public administration programs (without obtaining a 2nd Masters degree)
13. What on-the-job management training did you participate in prior to obtaining your current job as a department head? (Please mark all that apply)

___ I did not participate in on-the-job management training prior to my current job as a department head
___ Mentorship from department heads
___ Shadowing department heads (where you actually observed them perform their management tasks)
___ A formal in-house training program in management skills
___ Other methods (please specify) ________________

14. What other management experience did you have prior to obtaining your current job as a department head? (Please estimate the number of years in each applicable position. You may use decimal places to indicate partial years. Enter 0 for positions that don’t apply)

(For example, if you worked as an acting department head for 1 year and 6 months prior to your current job as a permanent department head, enter 1.5 in the first box below. If you list multiple other positions for the fourth option below, you may enter all of the positions in the box, following each entry with the number of years in that position)

___ Acting department head position(s)
___ Assistant department head position(s)
___ Unit head/team leader position(s)
___ Other position(s) (please specify) _______________

15. Was previous management experience a required qualification for your current library department head job?

___ Yes, it was required
___ No, but it was a preferred qualification
___ No, it was neither a required nor a preferred qualification
___ I don’t remember

16. Was previous management training (formal or on-the-job) a required qualification for your current library department head job?

___ Yes, it was required
___ No, but it was a preferred qualification
___ No, it was neither a required nor a preferred qualification
___ I don’t remember
17. How long, all together, have you served as a department head (including all department head jobs at various institutions)?

(Please estimate the number of years. You may use decimal places to indicate partial years)

___ (enter number of years here)

18. While serving in department head positions, what formal management training have you participated in? (Please estimate the total number of courses, workshops, etc. in each applicable category. Enter 0 for categories that do not apply)

(For example, if you have taken 3 management classes at a library school while serving as a department head, enter the number 3 in the first box below)

___ Management classes at a library school
___ Obtained a 2nd Masters degree in a management field, such as a Master of Business Administration (MBA) or a Master of Public Administration (MPA) degree (just mark with a 1 if so)
___ Some classes in business schools or public administration programs (without obtaining a 2nd Masters degree)
___ Management workshops or seminars
___ Management internships or fellowships

19. In regards to formal training while in your current job, were these classes, etc., mostly required, encouraged, or voluntarily attended?

___ Required
___ Encouraged
___ Voluntarily Attended

20. Have you implemented any ideas, from these classes, workshops, or internships in your management work?

___ Generally Yes
___ Somewhat
___ Generally No

21. Does your current library support participation in formal training with financial assistance or release time?

___ Yes, with financial assistance only
___ Yes, with release time only
___ Yes, with both financial assistance and release time
___ No, my library does not support participation with financial assistance or release time
22. While serving in department head positions, what on-the-job management training have you participated in? (Please mark all that apply)

___ I have not participated in on-the-job management training while serving in department head positions
___ Mentorship from senior administrators
___ Shadowing senior administrators (where you actually observed them perform their management tasks)
___ A formal in-house training program in management skills
___ Other methods (please specify) ____________________

23. In regards to on-the-job management training while in your current job, was this training mostly required, encouraged, or voluntarily attended?

___ Required
___ Encouraged
___ Voluntarily Attended

24. Finally, which management training and development methods, if any, have you found to be particularly effective in helping you develop your management skills? (Please mark all that have been effective)

___ No methods have proven to be particularly effective
___ Additional management classes at a library school beyond a basic management class
___ A 2nd Masters degree in a management field, such as a Master of Business Administration (MBA) or a Master of Public Administration (MPA) degree
___ Some classes in business schools or public administration programs (without obtaining a 2nd Masters degree)
___ Management workshops or seminars
___ Management internships or fellowships
___ Job rotation
___ Committee assignments
___ Task force assignments
___ Special Projects
___ Mentorship from senior administrators
___ Shadowing senior administrators
___ A formal in-house training program in management skills
___ Other methods (please specify) ____________________
Appendix E: Survey for Library Administrators

(NB: This survey was in an online format when administrators completed the survey. This document only represents the order and wording of survey questions.)

The first page of the survey included the informed consent fact sheet as follows:

Title of Study: The Current State of Management Preparation, Training, and Development among Middle Manager Librarians in Academic Libraries

IRB Study # 09-0029

Principal Investigator: Michael Rooney
Email: mikerooney@unc.edu
Phone: 703-470-6843
Faculty Advisor: Barbara Moran

Information about participation and informed consent

What are some general things you should know about research studies?
You are being asked to take part in a research study. To join the study is voluntary. You may refuse to join, or you may withdraw your consent to be in the study, for any reason, without penalty.

Research studies are designed to obtain new knowledge. This new information may help people in the future. You may not receive any direct benefit from being in the research study. There also may be risks to being in research studies.

Details about this study are discussed below. It is important that you understand this information so that you can make an informed choice about being in this research study. You should ask the researcher named above any questions you have about this study at any time.

What is the purpose of this study?
The purpose of this research study is to gauge how much importance academic library administrations place on developing librarians to be effective managers, how they support the development of their librarians as effective managers, and which types of management development are most effective. Department heads will be surveyed separately to see how much management preparation, training, and development academic library department heads have obtained. The survey will ask you about your library’s efforts to develop librarians into effective managers, your opinions on the importance of various management experiences among department heads, and your opinions on the most effective types of management training and development.
How many people will take part in this study?
If you decide to be in this study, you will be one of approximately 400 to 500 librarians in this research study.

How long will your part in this study last?
Your participation in this study consists solely of filling out the survey questionnaire. Based on pre-test results, you can expect to spend a total of 10 to 15 minutes to complete the entire questionnaire. Once you have completed the survey questionnaire, your part of the study is complete.

What will happen if you take part in the study?
If you take part in this study, you will fill out the questionnaire beginning on the next page, answering the types of questions described in the study purpose section above. You may skip any question you do not have an answer for or do not wish to answer. Your responses will be saved as you complete each page of the survey, but your responses will only be used if you complete the survey. The survey software will alert you when you have reached the end of the survey. Your participation will be complete at that time.

What are the possible benefits from being in this study?
Research is designed to benefit society by gaining new knowledge. You may also expect to benefit by participating in this study by receiving a copy of the study’s final report, which will give you an idea of where your library stands against its peers in terms of how much importance your library puts on developing librarians as managers and how much support your library provides for management development, and what your peers think are effective ways to develop department heads into better managers.

What are the possible risks or discomforts involved from being in this study?
It is not expected that you would face embarrassment, distress or discomfort simply from filling out the questionnaire. If you do feel embarrassment, distress or discomfort from any of the questions, you are free to skip those questions or discontinue your participation in the survey. Every effort will be made to keep your responses confidential, as described in the next section. However, there is always a negligible risk that information sent over the internet could be intercepted or information stored on a computer could be accessed by an unauthorized person, despite the researcher’s best efforts to prevent such an occurrence and the great unlikelihood of such an occurrence. There may be uncommon or previously unknown risks. You should report any problems to the researcher.

How will your privacy be protected?
The only people who will have access to the answers you provide in the survey are you, through the link provided in this email and while the survey is in progress, and the principal investigator. While the survey is in progress, your answers will be stored on a secure server belonging to the Odum Institute for Research in Social Science at UNC. Only the principal investigator will have access to your answers at this time, through a password protected web account. Once the survey period has ended, the principal investigator will download all survey data to his laptop computer and remove all individual identifiers from the data set that linked you to your answers.
Participants will not be identified individually in any report or publication about this study. Although every effort will be made to keep research records private, there may be times when federal or state law requires the disclosure of such records, including personal information. This is very unlikely, but if disclosure is ever required, UNC-Chapel Hill will take steps allowable by law to protect the privacy of personal information. In some cases, your information in this research study could be reviewed by representatives of the University, research sponsors, or government agencies for purposes such as quality control or safety.

Will you receive anything for being in this study?

You will be receiving a copy of the study’s final report by email for taking part in this study, so that you may know the results of the research in which you have participated.

Will it cost you anything to be in this study?

There will be no costs for being in the study.

What if you are a UNC employee?

Taking part in this research is not a part of your University duties, and refusing will not affect your job. You will not be offered or receive any special job-related consideration if you take part in this research.

What if you have questions about this study?

You have the right to ask, and have answered, any questions you may have about this research. If you have questions, or concerns, you should contact the researcher listed above.

What if you have questions about your rights as a research participant?

All research on human volunteers is reviewed by a committee that works to protect your rights and welfare. If you have questions or concerns about your rights as a research subject you may contact, anonymously if you wish, the Institutional Review Board at 919-966-3113 or by email to IRB_subjects@unc.edu.

Participant’s Agreement:

By checking yes below and completing the survey questionnaire, you are indicating the following:

- I have read the information provided above.
- I have asked all the questions I have at this time.
- I voluntarily agree to participate in this research study.
Do you attest to the preceding and consent to participate in this research study?

___ Yes  ___ No

*The body of the survey was as follows:*

*Header at the top of each page reads:* *Remember that you may skip any question if you don't know the answer or do not want to answer. But, please try to answer each question or provide an estimate if necessary.*

1. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

   *It is important for a new department head at my library to have previously served as a department head at another library or in another department at my library.*

   ___ Strongly Agree  ___ Agree  ___ Neither Agree nor Disagree  ___ Disagree  ___ Strongly Disagree

2. In most cases, when hiring a new department head, does your library list previous experience as a department head as a qualification for the job?

   ___ Yes, it is a required qualification  ___ Yes, it is a preferred qualification  ___ No, it is not listed as a qualification

3. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

   *It is important for a new department head at my library to have on-the-job management experience in a lesser role prior to becoming a new department head. (On-the-job experience in a lesser role includes serving as an acting department head, serving as an assistant department head, or serving as a unit head/team leader)*

   ___ Strongly Agree  ___ Agree  ___ Neither Agree nor Disagree  ___ Disagree  ___ Strongly Disagree
4. In most cases, when hiring a new department head, does your library list on-the-job management experience in a lesser role as a qualification for the job?

___ Yes, it is a required qualification
___ Yes, it is a preferred qualification
___ No, it is not listed as a qualification

5. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

For new department heads that do not have previous experience in a management position with all the attendant management duties, it is important for those new department heads at my library to have some supervisory experience prior to becoming a new department head. (This may include supervising any or all of the categories of professional, paraprofessional, and student workers)

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree

6. In most cases, when hiring a new department head, does your library list supervisory experience as a qualification for the job?

___ Yes, it is a required qualification
___ Yes, it is a preferred qualification
___ No, it is not listed as a qualification

7. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

It is important for new department heads at my library to have general academic librarianship experience, though not necessarily in a management or supervisory position, prior to becoming a new department head.

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree
8. In most cases, when hiring a new department head, does your library list general academic librarianship experience as a qualification for the job?

___ Yes, it is a required qualification
___ Yes, it is a preferred qualification
___ No, it is not listed as a qualification

*If either yes answer go on to question 9. If no, skip to question 10.*

9. How many years of previous academic librarianship experience does your library require of *new* department heads?

___ (enter number of years here)

10. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

It is important for a *new* department head at my library to have participated in *formal* management training, beyond a basic management class taught in library school, prior to becoming a new department head. (Formal training includes additional management classes at a library school beyond a basic management class, classes in business schools or public administration programs, management workshops or seminars, and management internships or fellowships)

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree

11. In most cases, when hiring a new department head, does your library list prior formal management training, beyond a basic management class taught in library school, as a qualification for the job?

___ Yes, it is a required qualification
___ Yes, it is a preferred qualification
___ No, it is not listed as a qualification

12. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

It is important for a *new* department head at my library to have participated in *on-the-job* management training prior to becoming a new department head. (On-the-job management training includes mentorship from a department head, shadowing a department head as
they perform management tasks, formal in-house training programs in management skills, or similar arrangements)

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree

13. In most cases, when hiring a new department head, does your library list prior on-the-job management training as a qualification for the job?

___ Yes, it is a required qualification
___ Yes, it is a preferred qualification
___ No, it is not listed as a qualification

14. When hiring a new department head, does your library consider previous management experience to be more important, previous experience in similar departments to be more important, or both types of experience to be equally important?

___ Previous management experience is more important
___ Previous experience in a similar department is more important
___ Both types of experience are equally important

15. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

It is important for current department heads to participate in ongoing formal management training. (Formal training includes additional management classes at a library school beyond a basic management class, classes in business schools or public administration programs, management workshops or seminars, and management internships or fellowships)

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree
16. Does your library require or encourage *current* department heads to participate in ongoing formal management training?

___ Yes, we require ongoing formal management training
___ Yes, we encourage ongoing formal management training
___ No, whether they participate in ongoing formal management training is completely up to their own initiative

17. Does your library support the participation of *current* department heads in ongoing formal management training through financial assistance or release time?

___ Yes, with financial assistance only
___ Yes, with release time only
___ Yes, with both financial assistance and release time
___ No, we do not support participation with financial assistance or release time

18. Please indicate your level of agreement with the following statement by marking whether your opinions fall into the category of strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree.

It is important for *current* department heads to participate in ongoing *on-the-job* management training. (On-the-job management training includes mentorship from a senior administrator, shadowing a senior administrator as they perform similar management tasks, formal in-house training programs in management skills, or similar arrangements)

___ Strongly Agree
___ Agree
___ Neither Agree nor Disagree
___ Disagree
___ Strongly Disagree

19. Does your library currently operate one or more of the following forms of *on-the-job* management training for *current* department heads? (Please mark all that apply)

(Note: Depending on your answer to this question, the software may automatically skip to Question 21. Please ensure that you do not make more than one selection if you select the first option, indicating that you do not operate on-the-job management training.)

___ My library *does not* operate on-the-job management training for current department heads
___ Mentorship programs where senior administrators mentor department heads
___ Shadowing programs where department heads shadow a senior administrator as they perform similar management tasks
___ A formal in-house training program in management skills
___ Other on-the-job training arrangements (please specify) ______________
If yes to any, go on to question 20. If no to all, skip to question 21.

20. Does your library require or encourage current department heads to participate in ongoing on-the-job management training.

___ Yes, we require ongoing on-the-job management training
___ Yes, we encourage ongoing on-the-job management training
___ No, whether they participate in ongoing on-the-job management training is completely up to their own initiative

21. Which management training and development methods, if any, has your library found to be particularly effective in helping current department heads become better managers? (Please mark all that have been effective).

___ No methods have proven to be particularly effective
___ Additional management classes at a library school beyond a basic management class
___ Classes in business schools or public administration programs
___ Management workshops or seminars
___ Management internships or fellowships
___ Mentorship arrangements where senior administrators mentor department heads
___ Shadowing programs where department heads shadow a senior administrator as they perform similar management tasks
___ A formal in-house training program in management skills
___ Other methods (please specify) ______________

22. Does your library have a formal or informal policy of identifying lower level librarians who have the potential to become effective managers in the future and then helping those librarians develop that potential?

(Note: Depending on your answer to this question, the software may automatically skip to Question 26.)

___ Yes
___ No

If yes, go to questions 23, 24 and 25. If no, skip to question 26.
23. What methods does your library use to identify lower level librarians as having the potential to become effective managers in the future? (Please mark all that apply)

___ Using information from annual evaluation forms
___ Daily contact with lower level librarians
___ Through committee activities
___ Department or unit heads identify librarians with potential
___ Personnel librarians identify librarians with potential
___ Other methods (please specify) __________________

24. Does your library support the participation of lower level librarians in formal management training through financial assistance or release time? (Formal training includes additional management classes at a library school beyond a basic management class, classes in business schools or public administration programs, management workshops or seminars, and management internships or fellowships)

___ Yes, with financial assistance only
___ Yes, with release time only
___ Yes, with both financial assistance and release time
___ No, we do not support participation with financial assistance or release time

25. What on-the-job training methods does your library use to help identified lower level librarians develop their management skills and potential to become effective managers in the future? (Please mark all that apply)

___ My library does not use on-the-job training to help lower level librarians develop management skills
___ Job rotation
___ Committee assignments
___ Task Force Assignments
___ Special Projects
___ Mentorship from department heads
___ Shadowing department heads
___ A formal in-house training program in management skills
___ Other methods (please specify) __________________
26. Finally, which management training and development methods, if any, has your library found to be particularly effective in helping lower level librarians develop their management skills and potential to become effective managers in the future? (Please mark all that have been effective)

___ No methods have proven to be particularly effective
___ Additional management classes at a library school beyond a basic management class
___ Classes in business schools or public administration programs
___ Management workshops or seminars
___ Management internships or fellowships
___ Job rotation
___ Committee assignments
___ Task Force Assignments
___ Special Projects
___ Mentorship from department heads
___ Shadowing department heads
___ A formal in-house training program in management skills
___ Other methods (please specify) ______________