

Table of Contents

I.	List of Figures and Tables	3
II.	Strategic Intent and Advisory Council	4
III.	Executive Summary	5
IV.	UCLA Senior Fellows: Background	8
	Foundation	
	Impact to Date	
	Current Management	
	Location	
	Library Sector and Audience Served	
	Current Program Life Cycle	
V.	Market Analysis	12
	Environmental Scan	
	Overview of Alternative Programs	
	Brand Awareness and Meaning	
	Reputation and Cost	
	Market Needs and Wants	
VI.	Enhancing the Program	26
	Target Audience	
	Improving Brand Awareness	
	Program Information	
	Refreshing the Curriculum	
	Mentoring	
	Professional Networking	
	Mission and Vision	
VII.	Financial Position	32
	Revenue and Expenses, 2012-2014	
	Break-Even Analysis	
VIII.	Strategic Options Going Forward	33
	Suggestions for What to Address in the Transition	
	Option 1: Collaborate	
	Option 2: Enhance Current Position	

Option 3: Redesign
Consideration of the Options

IX.	Next Steps	38
X.	Published Sources Examined	39
XI.	Appendixes	40
	Appendix A: Senior Fellows Interviews	
	Appendix B: Online Survey of Prospective Participants	

List of Figures and Tables

Figures

Figure 1. Senior Fellows program planning 2012 - 2014.....	11
Figure 2. Visual analysis of frequently-occurring words in Fellows interviews.....	18
Figure 3. Leadership programs mentioned by respondents.....	19
Figure 4. Preference for types of learning environments.....	25
Figure 5. Order of preference for learning about programs.....	28

Tables

Table 1. Selected program features of library leadership development programs.....	10
Table 2. Alternative leadership development programs	14
Table 3. Characteristics of cohorts of Frye Institutes, 2008 and 2015.....	15
Table 4. Word-of-mouth communications about Senior Fellows.....	20
Table 5. Likelihood of program attendance in next 1 to 3 years.....	21
Table 6. Most important factors for deciding to attend a program.....	21
Table 7. Prioritized list of most beneficial learning and program outcomes.....	24
Table 8. Prioritized list of most beneficial pedagogical methods.....	26
Table 9. Possible context of a future Senior Fellows program mission and vision.....	31

Strategic Intent and Advisory Council

Discussions in the winter of 2014-2015 between Deanna Marcum, Managing Director, Ithaka S+R, and Beverly Lynch, Professor and Director Senior Fellows Program, UCLA, led to their agreement to think and plan together for the future of the UCLA Senior Fellows program.

The Senior Fellows Program at UCLA has a proven track record for identifying and developing senior academic library leaders. The available evidence suggests that Dr. Lynch, who has led the program since 1991, has been a central resource underpinning the program's long success. Dr. Lynch recognizes that the program is vulnerable when it is dependent upon one person, and that a transition strategy is necessary to sustain not just the program, but also its ongoing outcome—a network of senior library leaders capable of continually improving the value of academic libraries to higher education in North America.

In keeping with its mission, Ithaka S+R has an emerging, keen interest in supporting the development of the next generation of academic and research library leaders. Recognizing the crucial role of library leaders to academic and research libraries' transition from collections-centered to services-centered organizations, Deanna Marcum (2015) has expressed interest in ITHAKA's helping to build a pipeline of leaders who can strategically position their libraries in the changing landscape of scholarship, teaching and learning.

In light of their common concerns and interests, in May 2015, Drs. Lynch and Marcum appointed the following facilitator and advisory council to collaboratively execute the first steps of identifying a sustainable future strategy for the Senior Fellows program. This document reports the results of the advisory council's work from June to November 2015.

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Executive Summary

This report grew out of a series of conversations about the future of the UCLA Senior Fellows program, first within the Senior Fellows class of 2014, and later in the context of a possible collaboration with Ithaka S+R. These conversations engendered a project, the UCLA Senior Planning Initiative, to consider how to transition the Senior Fellows program to its next generation, beginning in 2018.

A small advisory council undertook the project. Their report delivers background information about the Fellows program to date, a market analysis, evidence-based recommendations for enhancing the program, a preliminary financial analysis, and a set of three strategic options for transitioning the program to the future.

Program Management

UCLA Senior Fellows, in place since 1982, is the oldest formal leadership development program for librarians in the United States. Dr. Beverly P. Lynch, UCLA Professor and Director, Senior Fellows Program, has led the program since 1991. This report identifies Dr. Lynch's outstanding reputation and influence in the field, her unique combination of experiences and personal qualities (in libraries, as an LIS dean, as a leader, as a mentor) as one of the program's signature strengths and distinctive features. A key problem to be solved for the transition is how to replace her leadership.

Target Audience and Alternative Programs

UCLA Senior Fellows is a residential, 3-week, immersive leadership development program serving existing or prospective senior leaders in academic libraries, and to some extent, in the archives and special collections sector. An evaluation of the most recent directory of Senior Fellows provides evidence that roughly 60% of past participants are now at ARL libraries, and 40% are at non-ARL libraries. The ACRL/Harvard Leadership Institute for Academic Libraries, Leadership Fellows Program of ARL, and the Frye Leading Change Institute are the principal alternative programs whose target audiences overlap to some degree with that of UCLA Senior Fellows.

Market Position: Strategic Advantage

This strategic review indicates that the Senior Fellows program's market position is strong and its prospects within its target market are favorable. The program is highly prestigious and valued by not only its over 250 past participants, but also prospective participants. The advisory council's environmental scan results indicate that the Fellows program has met and can be expected to continue meeting the core needs and preferences of a target audience drawn from both ARL and non-ARL libraries in North America.

The program's prestige rests on a number of factors, including evidence that participation in the program has been a factor in career advancement in ARL and non-ARL libraries. The analysis suggests that the program has also consistently met its founding goal: to produce a lasting professional network of senior library leaders capable of continually adapting and enhancing the value of academic libraries to scholarship and higher education in North America.

Other advantages of the Senior Fellows experience (in addition to the leadership of Dr. Lynch) that set it apart from the closest alternative programs include:

- **The 3-week, highly immersive, residential experience**, which offers sufficient time away to step back from daily concerns and focus on reflecting on leadership, learning, enhancing self-awareness,

thinking strategically about issues, building trust, and developing bonds with peers. Participants not only gather for each day's program seminar—they also live in campus housing, share meals, and spend weekends together.

- **The program cohorts.** Each small Fellows cohort of 12 to 16 individuals consistently develops *lasting* relationships among its peers, who typically go on to help each other throughout their professional lives. Over time, the connection to one's cohort becomes a signature strength and unique aspect of the Fellows experience.
- **Customization and a participant-centered approach** to teaching and learning. Programs are customized around each carefully selected cohort, and each day's seminar is designed to be dynamic and interactive. The Fellows learning environment encourages conversation and guides participants to develop their own approaches and thoughts. The small size of each cohort is important for creating a safe environment for reflection, frank discussion, and growth as a library leader.
- **The Fellows professional network.** The combined cohorts, individuals' interactions across the Fellows network, and the high level of past participants' commitment to the program are not only distinctive strengths, they are also strategic assets that can be used to help the program through the coming transition.
- **UCLA.** The analysis of what past participants value the most about Senior Fellows revealed that the opportunity to spend three weeks on the UCLA campus in late summer is a unique element of the Senior Fellows 'brand.'

Enhancing the Program

Despite its strong market position, distinctive features, and enviable track record for developing leaders, Senior Fellows does have risks to be managed (a key one's being how to replace Dr. Lynch's leadership) and opportunities to grasp (for example, the chance to review and possibly expand the target audience). The advisory council recommends the consideration of the following program enhancements:

- Clarifying and possibly expanding the program's target audience
- Boosting the target audience's awareness and understanding of the program's distinctive value
- Improving and regularizing the communication of program information, especially via the website
- Developing a new mission and vision statement
- Evaluating and refreshing the curriculum
- Considering the addition of a mentoring element to the program

Financial Position

The fee for the 2016 Senior Fellows program has been set at \$9000 per participant. A comparative analysis of the costs of the principal alternative programs to participants suggests that the Senior Fellows fee provides good value for money, at an average cost to each participant of \$466 per day.

This project's analysis of Senior Fellows' estimated financial position after the 2014 program indicates that the program may not be breaking even. Nevertheless, the advisory council recommends both holding the Senior Fellows participant fee for 2018 at the 2016 level or lowering it, and also continuing to limit participants to around 15 people (the small size of the program is one of its unique advantages in the current market). As a result, holding the participant fee at the 2016 level, or even lowering it, will require further business planning around the financial aspects of the transition.

Strategic Options and Next Steps

The advisory council is suggesting the consideration of three strategic options for transitioning the Fellows program. In the interest of clarity, the report states the three options as more self-contained than they may actually be. The intent is to provide a starting point for decision making that will lead to the best outcome for not only the Senior Fellows program and its participants, but also for sustaining the professional network of Fellows. The three options are:

1. **Collaborate option.** Senior Fellows would continue at UCLA as a biennial, cost-recovery, three-week residential program for a small cohort. However, no single program director would be recruited to replace Dr. Lynch. Instead, a small team—a facilitator, three partners (Ithaka S+R, the IS department of GSEIS, and the UCLA Library), plus an additional ARL director and one or two recognized, influential library thought leaders—would develop the 2018 program. Working in parallel, the three partners would identify and agree on collaborative roles and responsibilities for the future Senior Fellows program and its funding model.
2. **Enhance option.** Senior Fellows would continue at UCLA as a biennial, cost-recovery, three-week residential program for a small cohort of individuals. The program would continue administratively within GSEIS and the IS department. The other primary stakeholder, should this option be chosen, might be the UCLA Library. A new program director would be recruited from within the IS department or externally.
3. **Redesign option.** The current status of Senior Fellows as a biennial, cost-recovery, three-week residential program for a small cohort of individuals would be evaluated from the ground up, including whether to continue locating the program at UCLA.

A consensus has emerged among the members of the advisory council and key stakeholders Dr. Marcum, Dr. Lynch, and Dr. Furner around the *Collaborate* option. The report discusses its anticipated benefits and risks in addition to those of the other options. The essential next steps are to ensure the success of the 2016 program; make a decision about how to structure, lead, finance, and create a plan of work for the 2018 program; and then put the pieces in place to develop and deliver the 2018 program.

The advisory council recommends that the transitional model and plan of work be ready to launch no later than June 2016, and that actual program development for 2018 begin no later than January 2017, and by fall of 2016 if possible.

UCLA Senior Fellows: Background

Foundation

The UCLA Senior Fellows program, initially established in 1982, is a highly prestigious leadership development program for high-potential academic librarians approaching the height of their careers. Originally an initiative of the then Council on Library Resources, it is the oldest formal leadership development program for librarians in the United States.

Selection to Senior Fellows is competitive. Every two years, the program has brought together from 12 to 16 individuals for a 3-week immersive experience, during which each cohort discusses together how to improve the strategic focus and value of their libraries not only within their institutions, but to higher education and to North America as a whole. The most recent published description of the Senior Fellows program, together with a literature review of articles about it, appeared this past fall (Ryan, DeLong and Garrison 2015).

Impact to Date

The Senior Fellows program has a track record for identifying and developing senior academic library leaders. From its inception in 1982 to May 2015, over 250 individuals have participated in the program—individuals who are now a virtual “who’s who” of the best academic library leaders in the United States. A recent directory of Senior Fellows is available on request.

Dorothy Anderson, who was a coordinator of the Senior Fellows program in its earliest years, published the results of her analysis of the career progressions of the 1982 and 1983 Senior Fellows compared to a control group of ACRL members. Her results indicated that “Senior Fellows are more than twice as visible, nearly twice as mobile, and three times more likely to assume management and leadership positions” (Anderson 1985, p. 331).

Participation in Senior Fellows has continued to be a factor in library career advancement over the years since 1985. As of 2010 (the latest figures available from the program director at this writing), almost 120 Senior Fellows became directors of ARL or non-ARL libraries, and more than 15 became senior leaders outside libraries. At least nine are or have served as library and information science faculty members. In addition, Fellows have frequently achieved elected offices and awards (e.g., 25 have been ALA presidents or division presidents), ten have been ARL president, and many have served on the ARL Board.

“According to participants, the value [of the Senior Fellows] experience is unparalleled.” Ryan, DeLong and Garrison 2015, p. 148.

The Senior Fellows program has not only been a factor in transforming individual careers. Structured analysis suggests that it has also produced and grown a lasting professional network of senior library leaders capable of continually adapting and enhancing how academic libraries support scholarship and higher education in North America. Another example of a structured analysis, besides the two already cited, is by Rumble and MacEwan (2008).

Current Management

Beverly P. Lynch was a member of the first Senior Fellows class in 1982. She was selected dean and professor of UCLA's School of Library and Information Science (LIS) in 1989, and she began leading the Senior Fellows Program in 1991. Dr. Lynch succeeded two earlier program directors, LIS dean Robert Hayes and LIS assistant dean Dorothy J. Anderson, who led the program from 1982-85 and 1985-9 respectively. Dr. Lynch has directed the program continuously since 1991 at UCLA, except for 1995 and 1997, when she codirected with Anne Woodsworth, then dean of the Palmer School of Library and Information Science at Long Island University.

Dr. Lynch's contributions to librarianship have been called "extraordinary and legendary" (American Library Association 2012). Besides leading the UCLA Senior Fellows program for almost 15 years, she was a founding director of the California Rare Books School. She has also been a library leader: she has held positions as librarian and administrator at the libraries of Yale University, Marquette University and the University of Illinois Chicago; and she served as the 100th vice president/president-elect of the American Library Association, on the Board of the Center for Research Libraries, and also as Executive Director of the Association of College & Research Libraries, among other influential professional roles.

In recognition of her distinguished service, she has received librarianship's highest honors—most recently, the 2015 award from Beta Phi Mu, the library and information studies honor society. Before that, Dr. Lynch's contributions were recognized with the 2012 Melvil Dewey Medal and the 2009 ALA Lippincott Award.

The centrality and importance of Dr. Lynch's ongoing role in the Senior Fellows program's success cannot be overstated. At the same time, she recognizes that the program is vulnerable when it is so dependent on one person. As noted earlier in this report, with Deanna Marcum, she has initiated this project to develop a transition strategy for sustaining Senior Fellows going forward, including identifying how the program will be led in the future. A key assumption of this project has been that Dr. Lynch will not have responsibility for developing and leading Senior Fellows after the 2016 program.

Location

With the exception of a brief stint at Long Island University (1995-1997), the Senior Fellows program has been based on the UCLA campus, first in LIS and subsequently as a program administered within the Graduate School of Education and Information Studies (GSEIS) Information Studies department (IS). The IS department's current chair is Jonathan Furner (<http://gseis.ucla.edu/directory/jonathan-furner/>). The program's residential setting on the UCLA campus and within GSEIS are discussed in later sections of this report.

Library Sector and Audience Served

One of the resources available to the advisory council was the report and openly available dataset of *Training the 21st Library Leader* (see Skinner and Krabbenhoft 2014). A useful byproduct of their systematic review of library leadership training programs was a categorization of the program features (see Table 1).

Using these categories, the UCLA Senior Fellows program can be defined as a *residential* one serving *senior managers* in the *academic and archives/special collections* sectors. In its investigation, the project team looked at both residential and fellowship programs that serve Senior Fellows' audience and sectors. The team did not investigate workshops or virtual programs for this audience and sectors.

Table 1. Selected Program Features of Library Leadership Development Programs

Category	Types
Program Type	<ul style="list-style-type: none"> • Residential (on-site experience one week or longer) • Fellowship (program length at least 9 months) • Workshop (one day event) • Virtual (online only)
Sector*	<ul style="list-style-type: none"> • Academic • Archives and special collections • Public including K-12 • Special • General (all libraries)
Audience	<ul style="list-style-type: none"> • Early career (first five years) • Mid-career • Senior management • All (all librarians)

Source: Skinner and Krabbenhoft 2014, appendix A, codebook.

*Skinner and Krabbenhoft (2014, p. 19-20) report there are over 3,500 college, university, and research libraries in the United States (comprising 3% of all U.S. libraries) that are potentially served by all leadership development programs designed for the academic market. They provide no separate estimate for the size of the archives and special collections sector.

Current Program Life Cycle

An objective of the advisory council was to document the process associated with developing and holding the Senior Fellows program every two years. Figure 1 presents the existing life cycle of activities across two of UCLA’s fiscal years. UCLA fiscal years begin on July 1 and end June 30.

The UCLA academic year consists of fall, winter, and spring quarters, followed by a summer session, which runs from mid-June to mid-September. The Fellows program is held every two years in August, during UCLA's summer session, when housing space is available in campus dormitories.

The Senior Fellows program development life cycle illustrated in Figure 1 presents the Fellows program activities in UCLA's 2012-2013 and 2013-2014 fiscal years, with a few months added to show the 2014 Fellows program, which actually occurred in the first quarter of UCLA's fiscal year 2014-2015.

Documentation of the program life cycle is important for understanding the process that has made Senior Fellows successful to date and for establishing a planning baseline for the next generation of the program. The program life cycle is also linked to the program's funding model, as discussed later in this report.

July 2012-June 2013

The life cycle illustrated in Figure 1 begins about six months into the first of the two fiscal years in the cycle, with an activity that occurs every year. This is the luncheon held at ALA Annual, to which all Senior Fellows are invited. ALA meeting space for the luncheon must be requested each January.

Late March to mid-June are busy with Fellows program activity related to the next biennial program and the maintenance of the Fellows professional network. A contract for housing in UCLA's dormitory complex, De Neve Plaza, must be secured for the next program; a variety of updates occur; and the yearly luncheon with all Fellows is held in conjunction with the ALA annual meeting.

July 2013-June 2014

In late summer, during the first quarter of the second fiscal year of the program life cycle, a call for nominations for the next program goes out to all Fellows, together with some additional updates for the Fellows professional network. The call for nominations kicks off a series of activities which culminates in the selection of the cohort for the next program by early February. Somewhat in parallel with the activities that create the next Fellows cohort, the program director then selects and confirms the guest speakers for the program.

Another set of activities also occurs to reserve space, invite the Fellows, and hold the annual luncheon at the ALA annual meeting.

July-September 2014

A final set of activities then kicks off and prepares the way for the Fellows program to be held—for example, sending pre-program communications to the cohort, setting up what the guest speakers need, re-verifying facilities arrangements, preparing program agendas, and so on. As noted already, the Fellows program actually occurs in UCLA's *next* fiscal year (in Figure 1, 2014-2015).

Market Analysis

Environmental Scan

The advisory council's environmental scan suggests that the outlook for the Senior Fellows program is strongly favorable in its current market—that is, existing and emerging senior leaders in North American academic libraries.

As laid out in subsequent sections of this report, Senior Fellows does have risks to be managed and opportunities to grasp. At the same time, the requirements for transition to a sustainable Senior Fellows program after 2016 appear to be structural (i.e., financial, operational, and organizational) rather than driven by substantive market shifts (e.g., overwhelming competition, technology-driven disruption, or a decline in the ability of the program to meet the core needs and preferences of its target market).

The advisory council reached this conclusion through:

- a literature review of relevant publications (see the “published sources examined” section)
- comparative analysis of other programs serving the same target audience
- qualitative and textual analysis of the transcripts of 22 structured interviews with selected Senior Fellows from the earliest to the most recent cohort (see appendix A)
- examination of online survey responses from 44 prospective participants in academic library leadership development programs for current or emerging senior leaders (see appendix B)
- information gathered in meetings with key stakeholders in the UCLA Library, the IS department of GSEIS, and the business office of GSEIS (to obtain budget information)

The following sections summarize those findings.

Overview of Alternative Programs

Searching the accompanying dataset of *Training the 21st Century Library Leader* (2014) suggests that the following *existing, ongoing* North American programs have some degree of overlap with the Senior Fellows target market (see Table 2). Two smaller programs serving restricted audiences were filtered from the dataset presented here.

Table 2. Alternative Leadership Development Programs for Senior Management of Academic Libraries

©Educopia Institute. Source: Dataset for *Training the 21st Century Library Leader*, available for unrestricted download.

program_title organizational_lead sector year_began	program_type length_in_person mentors (Y/N)	description	audience
HBCU Library Leadership Program HBCU Library Alliance, SOLINET Academic 2005	Residential 5 days Y	The goal of the Historically Black Colleges and Universities (HBCU) Institute is to provide theoretical instruction and practical lessons while assisting participants in formulating goals and meeting objectives to improve the libraries on their own campuses. The expected outcomes are: improved confidence and leadership skills among participants; improvement of services and strategic plans at participating libraries; and increased engagement of participants in both campus-wide committees and activities and the broader library community.	Mid-career, Senior Management
NLM/AAHSL Leadership Fellows Program National Library of Medicine; Association of Academic Health Science Libraries (AAHSL) Academic, special 2002	Fellowship 29 days Y	In response to the confirmed need for future leadership, the NLM/ AAHSL Leadership Fellows Program is focused on preparing emerging leaders for the position of library director in academic health sciences libraries. Fellows will have the opportunity to develop their knowledge and skills in a variety of learning settings, including exposure to leadership in another environment. They will be paired with mentors who are academic health sciences library directors.	Mid-career, Senior Management
ACRL/Harvard Leadership Institute for Academic Libraries Association of College and Research Libraries (ACRL); Harvard University, Graduate School of Education Academic 1999	Residential 6 days N	The Institute details important leadership concepts and applies them to the practical challenges of leading and managing the academic library. The curriculum addresses three areas: planning - organizational strategy and change, and transformational learning - with an overarching goal of increasing your leadership and management capacity. The program focuses on two key questions: How well positioned is your organization to meet current and future challenges? How effective is your own leadership?	Senior Management
Leadership Fellows Program Association of Research Libraries (ARL) Academic 2004	Fellowship 30 days (split over total program of 15 months) Y (shadowing)	The ARL Leadership Fellows program, known as the Research Library Leadership Fellows (RLLF) Program from 2004 through 2012, is an executive leadership program designed and sponsored by ARL member libraries that offers an opportunity for development of future Senior leaders in large research libraries and archives. The program engages library staff who have the desire and potential for leadership at ARL libraries with themes and institutions that will enhance their preparedness.	Senior Management
UCLA Senior Fellows Program Graduate School of Education & Information Studies, UCLA Academic 1982	Residential 21 days N	The Senior Fellows is a professional development program for senior level academic librarians. The program offers a unique combination of management perspectives, strategic thinking, and practical and theoretical approaches to the issues confronting academic institutions and their libraries. The Senior Fellows program is an immersive, intensive three-week residential program structured around a variety of learning experiences: lectures, guest speakers, case studies, field trips, and informal group study sessions. Sessions are held each morning, with afternoons usually devoted to study and recreation although some formal sessions will be scheduled.	Senior Management
Leading Change Institute Council on Library and Information Resources; EDUCAUSE Academic, Other 2013	Residential 6 days N	The Leading Change Institute explores higher education challenges, empowering librarians and information technologists to initiate conversations and take action on issues of importance not just to their individual institutions, but to the entire higher education community. Fellows in the 2014 Institute will hear from speakers from a wide range of backgrounds who will share real-life problems from across the higher education landscape for which participants will be challenged to devise and propose solutions.	Senior Management

The environmental scan suggests that the closest current alternatives to Senior Fellows are the ACRL/Harvard program and the ARL Fellows program. There is a smaller degree of overlap with the Frye Leading Change Institute. Tuition for the 2016 UCLA Senior Fellows program is \$9,000, which covers program costs, lodging, most meals, refreshments, social events and field trips. The three alternative program fees are as follows:

ACRL Harvard – \$3,300 per person, which includes tuition, instructional materials, refreshments and most meals. Travel and housing costs are not included.

ARL Fellows – According to information available on pages on the ARL member website during the time this report was being prepared, tuition for the 15-month program for 2016-2017 is \$10,500 per fellow from an ARL sponsoring institution, \$11,500 per fellow from a non-sponsoring ARL library, and \$12,000 per fellow from a non-ARL library. There are a limited number of places for non-ARL participants. Tuition covers all program and instructional materials, refreshments, breakfast and lunch during ARL Membership Meetings and institutes, and planned social events. Travel, lodging, and subsistence costs are not included and are the responsibility of the participant.

A third program, the Frye Leadership Institute, a CLIR/EDUCAUSE initiative that existed from 2000-2012, was also similar to Senior Fellows in its focus on the context of higher education, and it attracted library leaders as well as CIOs, information technologists and university leaders. The Frye Leadership Institute’s successor, the **Leading Change Institute**, continues to focus on the changing context of higher education. However, while it most certainly continues to be of value for library leaders, there is some evidence that the target audience for Leading Change may be shifting, so that participants may be more likely to be CIOs, learning technologists, university or college administrators/deans or other professionals than librarians. Table 3 compares data on a sample of Frye Leadership Institute cohort members in 2008 and the Frye Leading Change cohort of 2015.

The tuition for the 2016 Leading Change Institute is \$5,500. Tuition for the Institute includes the program; lodging for five nights; and breakfasts, lunches and two dinners. The costs of transportation and other meals are the responsibility of the participant. Some scholarships are available.

Table 3. Characteristics of cohorts of Frye Institutes, 2008 and 2015.

	2008 Frye Leadership Institute	2015 Frye Leading Change
Library leaders and librarians	78%	36%
University technologists, academics, other professionals	22%	64%

Data sources:

2008 data – Lim, Lewis and Baker 2015, p. 299. N=25

2015 data – online analysis of positions held by members of the 2015 cohort listed by name at <http://www.clir.org/pubs/issues/issues103/issues103#LCI>. N = 36

While the different cost structures of these programs make comparison difficult, the calculation of an estimated cost per day for each program (including both covered and uncovered costs of attending)

suggests that UCLA Senior Fellows may be a good value for money, with an estimated average cost per day of \$466.

Brand Awareness and Meaning

The “product” of a leadership development program is intangible. Strong branding of educational programs is important, because brands create trust and confidence around the purchase of something that is, in effect, invisible. Branding also helps target audiences understand what is being offered. When there is no tangible product to sell, the organization offering the service becomes the brand (for a highly-cited discussion of service branding see Berry 2000).

Brands for services like leadership development are built around what the host organization says it does (marketing communications), what others say it does (external communications like word-of-mouth), and the first-hand experiences of those who use the service (experience-based beliefs).

Through interviews with a selected group of past Senior Fellows and an online survey of prospective participants in senior library leadership development programs, the advisory council investigated Senior Fellows’:

1. *brand meaning* (what past Fellows valued the most and what they found distinctive about Senior Fellows), and
2. *brand awareness* (prospective participants’ ability to recognize and recall UCLA Senior Fellows and similar programs when given a cue).

The results of the interviews and the online survey suggest that while *brand meaning* is highly positive, *brand awareness* of the UCLA Senior Fellows program could be improved. The following subsections and a later section on marketing provide details and continue this discussion.

Brand meaning

The advisory council selected and completed structured interviews of 22 past Senior Fellows. Appendix A contains the interview questions.

Qualitative analysis: the program’s signature strengths

As a first step, the advisory council completed a qualitative analysis of an anonymized transcript of interviewee responses. The qualitative analysis of interview responses identified the following *top three* signature strengths and distinctive features of past Senior Fellows programs.

Time away. The immersive, three-week experience, which provided the setting to step away from daily concerns and focus on reflecting on leadership, learning, enhancing self-awareness, thinking strategically about issues, building trust, and developing relationships with peers. Pre-program materials make it clear that the program is not a vacation; that spouses or partners are not expected; and that

Fellows will not only be working each day in a seminar setting, they will also be living together in campus housing, sharing meals, and spending weekends together.

The cohort and its small size. Interviewees pointed to Senior Fellows as consistently enabling the development of *lasting* relationships among peers in the same small class, who go on to help each other throughout their careers. Over time, the connection to one's cohort becomes a signature strength of the experience.

Beverly. Interviewees frequently noted not only Dr. Lynch's outstanding reputation in the field, but also her unique combination of experiences and personal qualities (in libraries, as an LIS dean, as a leader, as a mentor). In addition, interviewees valued her very large network of professional connections, which enables her to bring in excellent speakers, from chancellors, provosts and academic faculty to the most influential library leaders. Interviewees also credited her with setting an atmosphere of trust and confidentiality, in which participants and speakers converse candidly and issues are explored openly and in-depth.

Additional strengths and distinctive features

Program content. Interviewees noted program content as another major strength of the program, particularly the sessions on key leadership issues, and those that enabled them to understand issues strategically, and in the changing context of higher education. In addition, they appreciated the opportunity to learn about new topics, such as fundraising, budgeting and communications.

Customization. The small size of each cohort enables customization of each program. Dr. Lynch expends a good deal of effort in putting each cohort together and customizing each program's curriculum around those individuals. Interviewees appreciated how the carefully selected cohorts optimize group interactions.

A "flipped" classroom. Senior Fellows has for years used the approach now known as a "flipped" classroom or "flipped" learning, a pedagogical approach in which classes are dynamic and interactive, and the educator encourages conversation and guides students to apply concepts, rather than deliver lectures. Several interviewees noted the expectation that Senior Fellows participants would develop their own approaches, thoughts, and focuses on the issues. The small size of each cohort and the participant-led nature of the program created a safe environment for reflection, frank discussion, and growth as a library leader.

The Fellows professional network. The prestige of the Senior Fellows network makes being selected empowering and confidence-building

Interview Quotes

"In terms of the major strengths of [Senior Fellows], I liked having the time to focus and build relationships with other attendees. Having a cohort of 15 allows you to find people ... and continue learning jointly with them after the program is over."

"The major strength was professional growth in an atmosphere of camaraderie. The open discussion during sessions and off time in a trusted environment were invaluable."

"The size (14-15 people) is a strength, as is the residential nature of the program. Three weeks is enough time for the group to disconnect from their daily lives, step away and focus on something new."

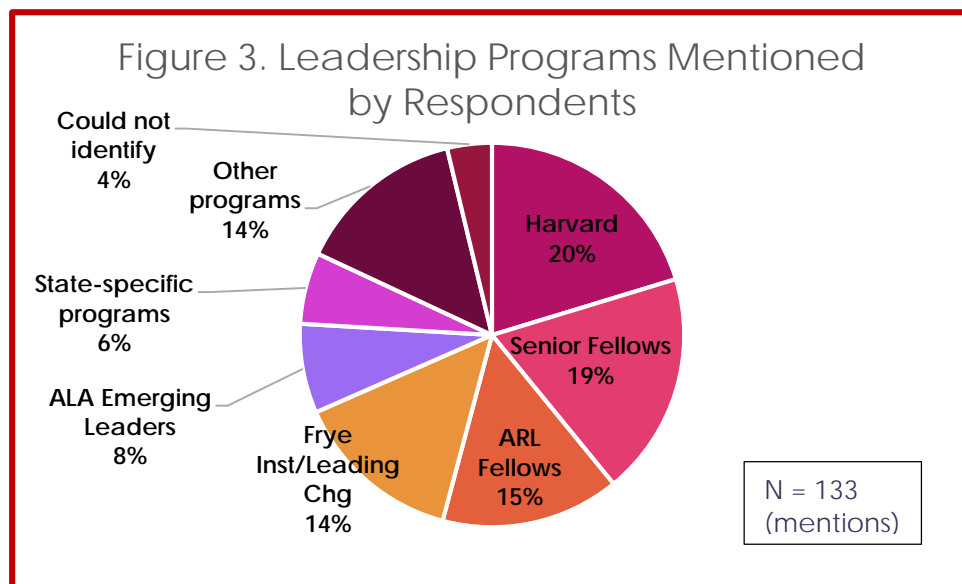
"The most distinctive thing is the three weeks of residency and the character of the program as a seminar—the commitment to a daily gathering of the cohort."

"Beverly has carried the program as a personal mission. Her stature, credibility, and generosity are so important to the program. I don't know how to replicate those qualities going forward."

"The 'brand' is Beverly and the UCLA campus in August."

1. Asked how familiar they are with library leadership development programs, over two-thirds of respondents replied they are very or moderately familiar with such programs. This result is not surprising, as the sample was made up of individuals who had been identified in the course of interviewing past Senior Fellows. Specifically, Senior Fellow interviewees were asked to name two or three librarians that they felt might benefit from and contribute to a future program for current or emerging library leaders. This resulted in a list of 55 individuals, who made up the survey sample. There were 44 responses to the survey for an 80% response rate.
2. Asked what programs come to mind when they think about library leadership programs, over two-thirds of respondents mentioned the ACRL/Harvard, UCLA Senior Fellows, ARL Fellows or Frye Institute/Leading Change programs. These four programs may be understood as possessing the stronger brands for this target audience (current and emerging senior leaders in academic libraries).

However, *the brand awareness of UCLA Senior Fellows may have been overstated* in these results, because the invitations sent to participate in the survey were identified as coming from the UCLA Senior Fellows Advisory Council—thus triggering respondent awareness that may have not been present before.



3. The results of the next survey question seem to confirm that more respondents had heard of the ACRL/Harvard program (90.9%), ARL Fellows (86.4%), and the Frye Institute/Leading Change program (79.5%), than had heard of UCLA Senior Fellows (75%). When asked later in the survey how *familiar* they are were with the UCLA Senior Fellows program, only 9% claimed to be extremely or very familiar with it, while 27% said they were not at all familiar with it. In another survey question, whose results are presented in Table 4, respondents reported relatively modest levels of word-of-mouth communications about Senior Fellows—with almost four out of ten respondents having rarely or never heard others talking about Senior Fellows. This finding was echoed in the Senior Fellows interviews.

Table 4. Word-of-mouth communications about Senior Fellows

In the last year, how often have you heard other people talking about the UCLA Senior Fellows Program?		
Answer Options	Response Percent	Response Count
Extremely often	0.0%	0
Very often	9.1%	4
Moderately often	27.3%	12
Slightly often	25.0%	11
Not at all often or never	38.6%	17
<i>answered question</i>		44

“The program does not have the name recognition/awareness as I would expect.”—“Senior Fellows ... is more of an ‘insiders’ program.”—Senior Fellows interviewee

Participants attend multiple programs

The survey results suggest an interesting aspect of the present situation for leadership development programs. Individuals perceived as having high potential as leaders appear to be attending multiple leadership institutes. In the online survey, when asked to identify other programs they had attended, 62.8% responded they had already attended the ACRL/Harvard program, the ARL Fellows program, or one of the Frye programs. The Senior Fellows interview data confirmed this finding; the results of interview question 3 identified (in this order) ARL Fellows, ACRL/Harvard, the Frye Institute, ARL’s Leadership & Career Development program, and various other programs as the ones they had attended in addition to Senior Fellows.

Over half of the online survey respondents claim they are extremely or quite likely to attend a library leadership program in the next one to three years (Table 5). The nine individuals who responded they are extremely likely to attend a future program indicated their choices are most likely to be ARL Fellows, Frye Leading Change, or UCLA Senior Fellows. A later question asked all respondents explicitly about their interest in attending Senior Fellows if invited: 72% selected extremely or very interested in attending.

Table 5. Likelihood of program attendance in next 1 to 3 years.

How likely are you to attend a library leadership development program in the next 1 to 3 years?		
Answer Options	Response Percent	Response Count
Extremely likely	20.5%	9
Quite likely	27.3%	12
Moderately likely	22.7%	10
Slightly likely	22.7%	10
Not at all likely	6.8%	3
<i>answered question</i>		44

Reputation and Cost

Results of the online survey suggest that program reputation is the most important factor in deciding to attend a leadership development program, even more important than cost. Nevertheless, 70% of respondents rated program cost as very to moderately important to the choice of program. Table 6 reports these results side by side.

Table 6. Most important factors for deciding to attend a program. N = 44

Green = top choices

Q17. Please choose from ONE to THREE factors that would have the MOST impact on your decision whether to attend a leadership development program. N=44			Q18. How important is program cost when choosing a leadership development program? N=44		
Answer Options	Response Percent	Response Count	Answer Options	Response Percent	Response Count
Reputation of program	77%	34	Extremely important	18%	8
Institutional support for program costs, travel costs, and my time away	66%	29	Very important	36%	16
Program length	39%	17	Moderately important	34%	15
My workload	32%	14	Slightly important	11%	5
My commitments at home	30%	13	Not at all important	0%	0
Program location(s) (at my location/nearby, at a conference, online, etc.)	16%	7			
Size of program (number of attendees)	14%	6			
Other	7%	3			
Length of travel to program (if applicable)	2%	1			

In the nine respondent comments on the question about decision factors, two restated the importance of program reputation, three stressed the importance of program content and faculty strength, and two mentioned the attractiveness of programs with smaller numbers of participants.

In the four survey respondent comments on the question about the impact of price, three reinforced the critical role of institutional support for program costs, travel costs, and time away from the job. In essence, programs like ACRL/Harvard, ARL Fellows, Frye Leading Change, and UCLA Senior Fellows are highly unlikely to exist in the absence of funding from participants' institutions. Perhaps not surprisingly, those Senior Fellows who were interviewed by the advisory council seemed more concerned than prospective participants about the affordability of costs for leadership programs, as suggested by the interviewee quotes that follow. Interviewees made nine mentions of program cost as a barrier, threat, or concern facing the Senior Fellows program.

Cost is also an issue for ensuring the diversity of program participants. If less-wealthy libraries cannot afford to send their staff to programs like Senior Fellows, it will remain necessary to continue recruiting participants from within the limited number of wealthier academic libraries.

“One thing we have not talked about – sustainability and cost of the Senior Fellows program. My expenses were covered. What would a dean think is an affordable cost of the program? What would a dean reject as being out of reach?”

“Can there be some forms of financial support for attendees whose institutions may not be able to fully support their attendance?”

--Senior Fellows Interviewees

Market Needs and Wants

Prioritized learning and developmental outcomes

The interviews with past Senior Fellows included two questions to elicit perceptions of the program's most valued outcomes. Another of the questions asked about program strategies and objectives, and another gathered information about desired leadership skills and competencies. The sidebar captures some comments that were characteristic of those made during the interviews.

Analysis of the collected responses to these questions provided the foundation for the list of learning and developmental outcomes that online survey respondents were asked to prioritize. Next, the advisory council reviewed the learning objectives of the closest alternatives to Senior Fellows and also included these in the list. The final lists contained 12 learning outcomes and 9 program outcomes for respondents to rank.

When ranking the listed outcomes, respondents were asked to answer from the perspective of a person who has decided to attend a well-known program for academic library leaders (see Appendix B for a copy of the survey). Table 7 contains the results in order of respondents' priorities.

A survey question requesting respondents to identify other outcomes of value resulted in a number of restatements of outcomes already listed, especially those related to influencing others and understanding organizational culture and dynamics. The new outcomes identified were peer-to-peer learning, assessment skills, developing work-life balance, and understanding the differences between academic library settings (ARL vs. non-ARL, larger vs. smaller universities and colleges; etc.).

Interview Quotes

"Leading change—helping people change their mindsets."

"Putting a lot of focus on diversity and cultural competence."

"Relationship building and understanding the climate on campus."

"Political skills—how do people learn to be politically savvy in the academy?"

"Focus on high level thinking [and] developing your own vision and leadership path."

"My own personal voice and persona."

"A really deep understanding of higher education ... how our institutions are flexing now and how the library can help the institution and reflect the characteristics that will lead to survival and success."

"Fundraising ... understanding what this role means and how to go about doing it."

"Fiscal and budgetary skills and strategies"

"Mentoring should be included in any program like this."

Table 7. Prioritized list of most beneficial learning and program outcomes. N = 44

Green = top priorities

Yellow = middle priorities

Orange = lower priorities

Q1. Please prioritize the following potential LEARNING OUTCOMES in order of their benefit to you.			Q2. Please prioritize the following potential PROGRAM OUTCOMES in order of their benefit to you.		
Answer Options	Most beneficial	Percent	Answer Options	Most beneficial	Percent
Understand organizational culture and how to influence it; learn how to lead innovation and change	34	77%	Become a more strategic thinker; broaden my perspective	37	84%
Learn about fund raising; what this role means and how to go about it	27	61%	Take time away to step back from my workday mindset, focus on broader issues, and develop my own vision, goals, and/or action plan	33	75%
Learn how to present myself; develop my own voice as a leader	26	59%	Become more politically savvy; improve my ability to initiate conversations and position the library strategically	27	61%
Know a set of core skills for leading an organization and be able to apply them	26	59%	Build lasting relationships with a small cohort of trusted peers who will function as my own network and learning community	25	57%
Learn how to develop, inspire, coach and mentor others	25	57%	Build my self-awareness and confidence as a leader; assess and identify how to be more effective	24	55%
Improve knowledge and understanding of financial decision making, budgets, budgeting	25	57%	Prepare for a director or dean position-- understand what the job entails, how to succeed, be ready to interview	19	43%
Improve my ability to advance diversity and inclusion in library leadership, libraries, and higher education	23	52%	Become part of a large, prestigious professional network of library leaders*	15	34%
Learn negotiation, collaboration, and partnership skills	22	50%	Help me decide whether to pursue a library dean/directorship	15	34%
Improve knowledge and understanding of critical issues in higher education	21	48%	Be ready to undertake my own research project and disseminate the results	3	7%
Improve understanding of scholarly communication processes and implications for libraries	9	20%			
Improve my understanding and ability to use technology strategically	8	18%			
Further develop my capacity to conduct and disseminate research in my field	6	14%			

*Part of middle priorities because this outcome was often rated as moderately beneficial, while the next outcome (“help me decide ...” was more consistently ranked as less beneficial.

Diversity and inclusion

It is interesting to note that the results of the interviews with Senior Fellows indicate a strong priority for more knowledge and skill development around diversity and cultural competency. One interviewee remarked “The issues around diversity (class, social justice, and race) will continue to get more difficult in society and they are difficult to discuss on our campuses. We need to develop ways to engage in these conversations.” In contrast, prospective leadership program respondents to the online survey rated the ability to advance diversity as a middle priority.

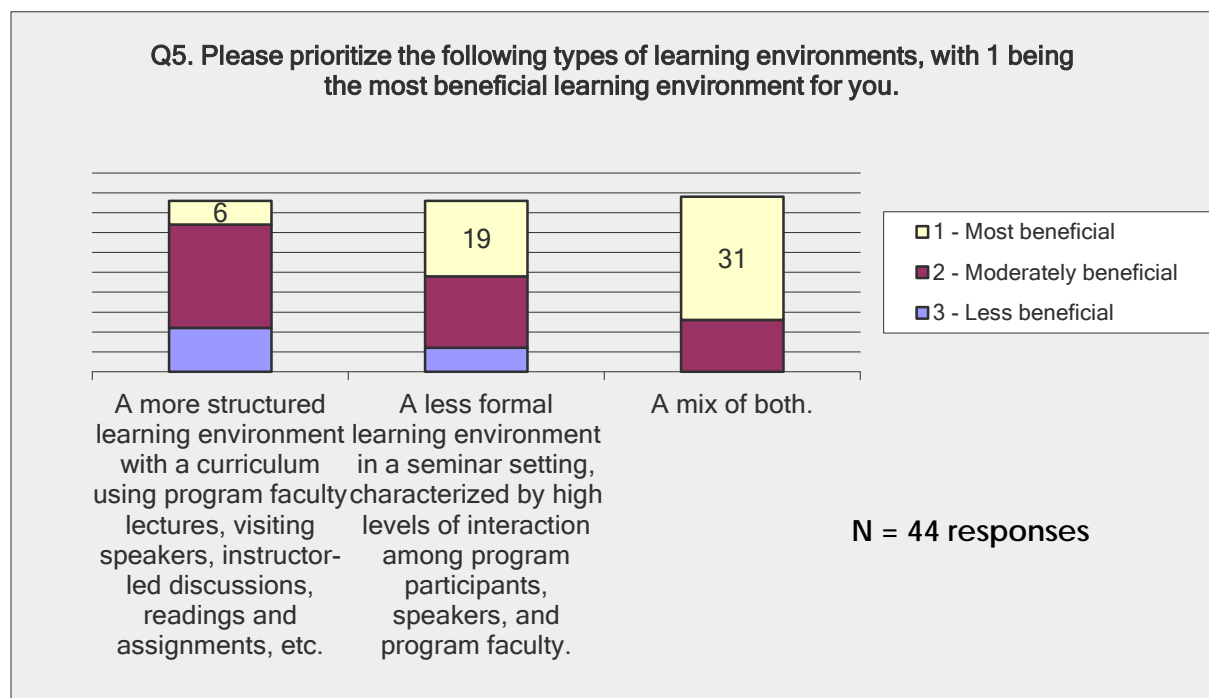
Characteristics of learning environments

The interviews with Senior Fellows contained a thread suggesting that the less-scripted, more participant-led (even “flipped”) structure of the Fellows program is a strength for many, though not all. Several interviewees noted that the less formal Senior Fellows learning environment may have advantages over the shorter or stretched-out opportunities for interaction provided by alternative programs. These include a stronger cohort, sustained focus, customized content, time for self-reflection, and taking responsibility for one’s own engagement and learning.

“Senior Fellows is a jam session; other programs are played from musical scores.”—Senior Fellows interviewee

A section of the online survey of prospective participants in leadership development programs tested respondent preferences for types of learning environments. Figure 4 presents the result that respondents found a mixed environment—some structured elements, some less formal – most beneficial. At the same time, the results indicate a slight preference for high levels of interaction.

Figure 4. Preference for types of learning environments.



Three of the twelve respondents who chose to comment on this question emphasized their preference for a high degree of interaction in learning environments, while two individuals emphasized their preference for learning in a more structured environment, and from experts rather than peers. The remainder either re-stated the value of a mix of both, or made other points.

Pedagogical methods

Online survey respondents were asked to assume they would be engaging in a program in which learning might occur before, during, and after the leadership development program. Then they were asked to identify the pedagogical methods that would be most beneficial to them. Table 8 contains a ranked list of respondents' preferences.

Table 8. Prioritized list of most beneficial pedagogical methods. N = 44
Green = top priorities Yellow = middle priorities Orange = lower priorities

Q6. Please prioritize the following possible pedagogical methods, with 1 indicating the methods that you find most beneficial.		
Answer Options	Most beneficial	Percent
Case studies, problem solving	33	75%
Professional mentoring and coaching during and/or after the program	32	73%
Informal conversations with other program participants	31	70%
Shadowing or job exchanges during and/or after the program	29	67%
Field trips or site visits	26	59%
Peer-to-peer coaching during and/or after the program	24	55%
Presentations and lectures	16	36%
Self-assessment tools*	14	32%
Individual assignments, readings*	12	27%
Post-program individual or group projects	10	23%
Group work and assignments*	9	20%
Diaries, blogs, wikis, discussion boards	4	9%

*N.B.: These three methods were rated as "moderately beneficial" by more than half of the respondents.

Enhancing the Program

Target Audience

The outlook for the Senior Fellows program is strongly favorable in its current market, which is existing and emerging senior leaders in the reported 3,998 academic libraries in the US and Canada (source: <https://www.oclc.org/global-library-statistics.en.html>). Of these nearly four thousand libraries, 124 (3%) are members of ARL (Association of Research Libraries).

The findings of the Fellows interviews suggest there may be some confusion around the intended audience: ARL, or both ARL and non-ARL? While communications about the program up to now may have been unclear, in fact, Fellows has attracted participants from both ARL and non-ARL libraries for

some time. Based on the 144 listings in the May 2015 directory of Senior Fellows in which the Fellows' name is associated with a library address, 61 (42%) are from non-ARL libraries, and the remainder (58%) are from ARL libraries. The advisory council's environmental scan results indicate that the Fellows program has met and will continue to meet the core needs and preferences of a target audience drawn from both ARL and non-ARL libraries in North America.

The advisory council strongly suggests that communications about the program be more explicit about the intended audience for the Fellows program, and that future communications clearly encourage the nomination of both ARL and non-ARL candidates. These actions can be expected to not only increase the size of the target audience from which participants can be drawn, but also positively influence the diversity of program participants.

Improving Brand Awareness

The results of both the Senior Fellows interviews and the online survey suggest the need for a careful analysis and new planning for marketing communications about Senior Fellows. The purpose is to increase *brand awareness* and boost the target audience's understanding of the distinctive value that Senior Fellows delivers, and for whom. At the moment *brand meaning* (what past Fellows value the most and what they find distinctive) is strong, but it is inadequately converted to brand awareness and positive *brand equity* (marketing advantage, or prospective participants' positive response to the Senior Fellows brand).

To address this issue, there is a need to not only engage in more formal marketing but also to expand the audience for the marketing. For instance, if Senior Fellows wanted to include more non-ARL participants, marketing communications might be prepared for, say, provosts and college librarians at the Oberlin groups of colleges.

Up to now, Senior Fellows "marketing" has relied on communications external to the program itself—mostly word of mouth. Word of mouth communications are extremely important within a well-connected professional network like academic librarianship. However, there is a question how far word-of-mouth goes beyond the immediate network of people who talk to one another regularly (for example, those working in ARL libraries).

By their nature, external communications like word-of-mouth rely on impressions about the Fellows program's purpose and value not only by participants but also by independent sources. One manifestation of the program's reliance on word of mouth communications, which came out in the interviews, is some confusion about the Fellows program's intended audience, as discussed in the previous section.

In contrast, more formal marketing communications are more intentional and have a broader reach than word of mouth communications. They can increase the clarity and understanding of Senior Fellows' purpose, mission, focus (the changing landscape of higher education), and target audience. Perhaps most importantly, marketing communications can more strongly influence the Senior Fellows program's reputation, target audience size, and the target audience's perceptions of the program's distinctive value compared to alternative programs. Also unlike word-of-mouth, more formal, intentional communications have the potential to increase the diversity of participants.

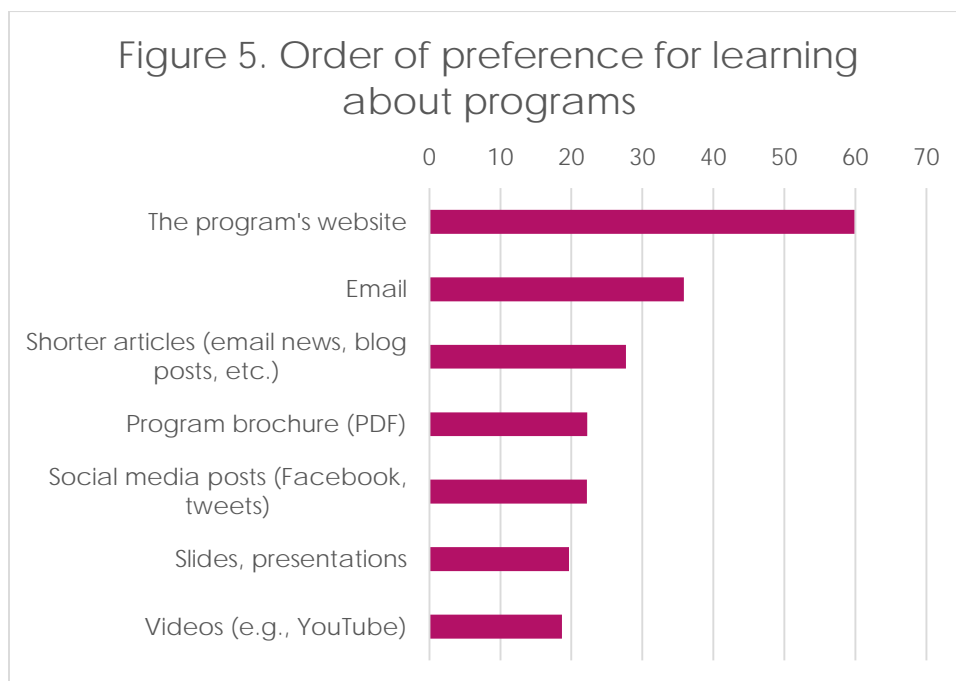
In addition, brand equity strongly affects how the target audience and stakeholders respond to the chance to enroll in the program (especially those who pay participant fees). Thus, cultivating brand

equity for Senior Fellows—and using marketing techniques to do so— becomes more critical as the market for leadership development programs has more players and becomes more competitive.

Program Information

The online survey contained a question designed to measure respondents’ needs and preferences— what they would like to have when considering leadership development opportunities, how and where they would like that information delivered, and what pre-program information they would like to have once they have registered for a program. Their replies suggest that the most-preferred methods for learning about a program are its website, email, and short articles (Figure 5).

Q15. Please rank the following possible methods for learning about programs in your order of preference, with 1 being the method you like most.



At the moment, the Senior Fellows website is badly in need of improvement; a fact noted by several Fellows in the interviews. As one of the interviewees put it, “[We need to] modernize the communications methods and resources. The website does not well represent the program [and] there is an overreliance on physical mail.”

A follow-up question in the online survey measured preferences for what materials to receive when one is registered and getting ready to attend a program. Respondents’ top three, in order of preference, are:

1. Pre-program readings, self-assessments, or other preparatory assignments (90%)
2. Information about the structure, content, and objectives of the program (80%)
3. Information about program accommodations, logistics, etc. (61%)

Lower-ranked choices included information about program faculty (34% - one respondent commented this can be easily found on the web), and a list of current and past participants (22%).

Refreshing the Curriculum

As noted earlier in this report, the less-scripted, more participant-led structure of the Fellows program is considered a strength for many who were interviewed, though not all. The selection of interview quotes that follow suggest that the transition of the program affords a good time to review the currency of the program's key topics and the balance of structure and improvisation in its curriculum. For example, diversity and inclusion issues might be considered as a key topic.

"How to keep the program fresh? If there isn't an ongoing Senior Fellows program, being a Senior Fellow loses power and influence. For the sake of everyone who is a Fellow now, the program needs to continue being high-level and excellent."

"There should be a stronger curriculum or more structure ... Yes, we can be responsible for our learning experience, but it would be good to have some structure as well."

"[Adjusting the] speakers and curriculum to reflect the particular issues that everyone needs to think about at the time ... [The program] needs to remain current with what is happening in higher education and libraries."

--Senior Fellows interviewees

Mentoring

The recent report *Training the 21st Century Library Leader* makes the point that leadership development training has matured over the past decades beyond classroom-based training. In this process "classroom experiences have been complemented—and sometimes even largely replaced by—developmental experiences (e.g., coaching, mentoring, team-based work, practicums, 360-degree feedback)" (Skinner and Krabbenhoft 2014, p. 5).

In keeping with the trend of including mentoring as a more frequent component of leadership programs at all levels, three of the six senior leadership development programs described in Table 2 have mentoring components. In the ARL Leadership Fellows program, this takes the form of a customized, immersive experience to shadow a library director.

The Fellows interview data makes it clear that Dr. Lynch has been serving as a mentor—both during and after the program—to many of the Fellows. The program also does a good job of building peer-to-peer coaching relationships among individuals in the same cohort. Interviewees noted that the annual reunions at ALA are extremely important for enriching and sustaining the professional network of all Fellows across cohorts.

Missing is a more intentional mentoring component built into the Fellows program—a possible enrichment for consideration during the time of transition that is coming for the Fellows program. Indeed, asked to identify key competencies for senior library leaders, several interviewees chose the ability to develop talent and mentor others. One interviewee's remarks suggested the idea of pairing new Senior Fellows with mentors from previous cohorts, or some other arrangement akin to ACRL's [College Library Director Mentoring Program](#), which matches first-year college library directors with more experienced colleagues.

Professional Networking

In their article on the Senior Fellows program, Rumble and Hayes (2008, p. 272) note that founding director, Robert Hayes, articulated the program's fundamental purpose this way: "to create through [participants] and their association with each other *a cadre of persons who [can] serve as a force for improvement of the strategic positions of libraries* within their institutions and the nation as a whole" (Hayes 1989, p. 20). The results of this advisory council's environmental scan provides evidence that, cohort by cohort, the program's founding purpose has been achieved for more than thirty years.

A key distinguishing element of the Senior Fellows program today is the prestige and size of its professional network of senior library leaders, and its impact in advancing Fellows' careers. Several interviewees made the point that past Fellows have a self-interest in keeping the Fellows professional network strong. Interviewees offered various suggestions for building on the existing network and extending it, such as introducing ways to build links between cohorts; using social web tools; or holding short Fellows workshops or programs on particular leadership topics in conjunction with conferences attended by many.

Mission and Vision

An organization's *mission* states the reason for its existence in three ways: what it does, who it is for, and how it accomplishes its work. An organization's *vision* states what it aspires to be over time and serves as the organization's compass or "north star."

When leadership changes, clear, compelling mission and vision statements can be sustaining, enabling focus on what remains important about the organization and what it aspires to do. For organizations that are part of larger entities or which frequently engage with partners, mission and vision statements can help to create vertical and/or horizontal strategic alignment between one organization and others.

Going forward, the UCLA Senior Fellows program would benefit from engaging with its key stakeholders in a renewal of its mission statement and possibly the addition of a vision statement. These could then be propagated to the Fellows website at an appropriate time; but the exercise of renovating the Fellows' mission and vision can be expected to deliver benefit in and of itself.

The [Fellows website](#) that existed while this report was being written did a reasonable job of stating the program mission (what it does, who it is for, how it does this):

The Senior Fellows is a professional development program for senior level academic librarians. The program offers a unique combination of management perspectives, strategic thinking, and practical and theoretical approaches to the issues confronting academic institutions and their libraries.

The Senior Fellows program is an intensive three-week residential program structured around a variety of learning experiences: lectures, guest speakers, case studies, field trips, and informal group study sessions.

At the same time—and anticipating the need for a mission and vision that can help sustain Senior Fellows through the transition of leadership that is coming—the existing descriptive statement is unlikely to be one that past Fellows can recall and articulate. Neither does the current statement draw others in, enlist the reader in a shared view of the future, or align strategically to the missions of UCLA,

GSEIS, the IS department, and the UCLA library. Table 9 summarizes the mission statements of these organizations.

Table 9. Possible context of a future Senior Fellows program mission and vision

Organizations	Statements
<u>UCLA</u>	<p>Mission: "UCLA's primary purpose as a public research university is the creation, dissemination, preservation and application of <i>knowledge for the betterment of our global society.</i>"</p> <p>First "principle of community": "We believe that <i>diversity is critical</i> to maintaining excellence in all of our endeavors."</p>
<u>UCLA GSEIS</u>	<p>Mission: "GSEIS is dedicated to inquiry, <i>the advancement of knowledge</i>, the <i>improvement of professional practice</i>, and service to the education and information professions. <i>We develop future generations</i> of scholars, teachers, information professionals, and <i>institutional leaders</i>. Our work is guided by the principles of individual responsibility and <i>social justice</i>, an ethic of caring, and commitment to the communities we serve."</p> <p><u>GSEIS Dean's message</u>: "Our responsibility moving forward is preparing the next generation of scholars and practitioners for <i>transformative work in an ever more diverse, interconnected, and miniaturized world.</i>"-- Dean Marcelo Suárez-Orozco</p>
<u>UCLA GSEIS, IS Department</u>	<p>IS vision: "The Department of Information Studies seeks to define, study, and evaluate <i>interactions among people, information and information technology in a pluralistic society</i>. The Department values and promotes <i>equity, diversity, accountability and intellectual openness.</i>"</p>
<u>Ithaka S+R</u>	<p>Mission: "Ithaka S+R is a not-for-profit service that helps the academic community navigate economic and technological <i>change.</i>"</p> <p>Libraries and Scholarly Communication program: "Through our research and services, the Libraries & Scholarly Communication program guides libraries, publishers, and scholarly societies as they <i>transition to the technological and economic context of the 21st century.</i>"</p>
<u>UCLA Library</u>	<p>Mission: "The mission of the UCLA Library is to provide access to and delivery of <i>information resources</i> to UCLA students, faculty, and staff in support of the research and instructional mission of the university... The Library provides [collections and] services ... to enable its users to fulfill their academic and intellectual needs... the Library encourages <i>innovation, capitalizes on appropriate technologies, forges effective partnerships</i>, and aggressively promotes excellence"</p>

Note: Emphasis (italics) added.

Some common threads in the table appear to be:

- Knowledge creation, dissemination; access to information resources
- Commitment to diversity, inclusion, social justice
- Excellence in professional practice in education and the information professions
- The application of a socio-technical approach (interaction among people, information, technology) to improve scholarship, teaching, and learning
- Innovation and change

What the Senior Fellows program distinctively adds to the context laid out in table 9 is its specific, time-tested capacity to create a lasting professional network of senior library leaders who continually adapt and enhance how academic libraries contribute to higher education and the advancement of knowledge. The common threads of the UCLA and Ithaka S+R statements, together with a statement about the Fellows program's distinctive features, might provide a good starting point for a Fellows program visioning exercise.

Financial Position

When Senior Fellows began in 1982, it was a fully funded initiative of the then Council on Library Resources (now CLIR). The intent was to make the program self-supporting, and it has been since 1991. Financial management for the program currently comes from the business office of GSEIS.

Senior Fellow participant fees cover housing, breakfast and dinner, all instructional costs including honoraria and travel of guest faculty, various tours and social events, use of an eight passenger van, administrative support and UCLA administrative fees. The fee for the 2016 program has been set at \$9000 per participant. As evidenced by the online survey results, the participant's home institution generally pays the fee plus the participant's travel expenses to attend. If there is a deficit at the end of the budget cycle, it carries over into the next year's budget.

Revenue and Expenses, 2012-2014

A discussion of the 2014 Senior Fellows program revenue and expenses for the financial cycle 2012-2014 took place on October 12, 2015 with Karen Calhoun, Bill Dandridge (UCLA GSEIS Assistant Dean for Financial Administration/Chief Financial Officer), and Ramces Jimenez (then UCLA GSEIS Contract and Grant Analyst). Following that meeting, Beverly Lynch verified this writer's interpretation of the numbers that the GSEIS business office supplied. The next step was to match the expenses incurred to prepare and deliver the 2014 Senior Fellows program (see Figure 1) with the revenue collected for participation in that program. Thanks are due to Clara Samayoa, Strategic Business Manager at Ithaka S+R, for her review and advice with the analysis of the current Fellows program's financial position.

Break-Even Analysis

A break-even analysis is a method for identifying the point at which revenue equals the costs of generating that revenue. Based on this analysis of Senior Fellows' financial position after the 2014 program, the program does not appear to be breaking even. In other words, the program does not seem to be self-supporting as intended.

Estimating a break-even point for the 2018 program would require first, selecting a model for structuring the program (see the next section for three suggested strategic options). Then, it would be

necessary to estimate the program's variable costs (those that increase in proportion to the number of participants) and fixed costs (those that remain the same regardless of the number of participants) for this model of planning and delivering the program. If the program improvements recommended in this report are acted upon—for example, improving administrative and marketing communications support, program fixed costs are likely to increase. Once estimates of variable and fixed costs are in hand, it would be possible to compute (1) an estimate of revenue to cover these costs and (2) a projected participant fee for a 2018 program for 15 individuals (or some other number of individuals).

The 2018 participant fee might be estimated and set in this way. However, given the present environment for leadership programs for senior library leaders, the advisory council recommends both holding the Senior Fellows participant fee for 2018 at the 2016 level (\$9,000) or lowering it, and also continuing to limit participants to around 15 people (the small size of the program is one of its unique advantages in the current market).

Holding the participant fee at the 2016 level, or even lowering it, will require expenses to be significantly scaled back, new sponsored funding to be found, new in-kind support to be put in place, new revenue to be generated, or some combination of these actions. Given the possible desire to intentionally attract more non-ARL participants (see "Improving Brand Awareness," p. 26), and the expanded target audience's probable sensitivity to cost ("Reputation and Cost," p. 21), a strategy for returning to the break-even point by raising the participant fee seems ill-advised. *In the absence of new sources of sponsored funding, new earned revenue, and/or in-kind support to lower expenses*, this report's recommendations are incompatible with the goal of breaking even.

Strategic Options Going Forward

Suggestions for What to Address in the Transition

This report lays out a number of issues and suggests they be addressed in the transition to a sustainable Senior Fellows program for 2018 and beyond.

It seems clear that communications to Senior Fellows and other stakeholders will need to cast the 2018 program as a transitional one. The advisory council believes the top priorities for the transition are:

1. **A successful 2016 program.** It almost goes without saying, but a successful program in 2016 is necessary to deliver the value participants expect, sustain the program's reputation, retain the confidence of the Senior Fellows professional network (the source of program nominations), and also sustain the confidence of those who provide the funds for participants to attend.
2. **Cost recovery:** Identifying what must be done, and achieving, cost-recovery funding while holding the line or lowering program fees
3. **Mission and vision:** Developing and building consensus around a revitalized, compelling mission and vision statement that is strategically aligned with the host institution and/or its partners
4. **New leadership:** Agreeing on how the program will be led. Is there another model other than that of a single leader? The likelihood of recruiting another program director with Dr. Lynch's abilities and stature in the field may be low. Continuing Senior Fellows without Dr. Lynch will not be the same as Senior Fellows today.

Whether the new leadership comes from a single individual or is team-based, if the program is planned using the current life cycle, the 2018 leadership should be in place, oriented, and ready to work by the third quarter of fiscal year 2016-17 *at the latest* (that is, no later than January 2017). An earlier start date would ensure adequate planning, perhaps fall of 2016.

The advisory council has also identified the following issues for consideration during the transition to a revitalized, sustainable program:

5. **Target market:** Clarifying the target audience for the program as both ARL and non-ARL. Possibly, intentionally expanding marketing communications to non-ARL libraries and to attract a more diverse pool of participants.
6. **Branding:** Improving awareness of the distinctive features of the program and cultivating the program's brand equity
7. **Communications:** Enhancing and regularizing program communications, especially via the program website
8. **Curriculum:** Refreshing the program curriculum
9. **Mentoring:** Considering the addition of a mentoring component to the program

The advisory council is suggesting the consideration of three strategic options for transitioning the Fellows program. In the interest of clarity, this report states the three options as more self-contained than they may actually be. The intent is to provide a starting point for decision making that will lead to the best outcome for not only the Senior Fellows program and its participants, but also for sustaining the professional network of Fellows. Each Fellows cohort and the combination of cohorts that make up the Fellows network— together with these individuals' commitment to the program—are strategic assets that can help the program thrive and remain competitive during the coming transition.

Option 1: Collaborate

In the *Collaborate* option, Senior Fellows would continue as a biennial, cost-recovery, three-week residential program for a small cohort of individuals. The program would continue to be held at UCLA. However, no single program director would be recruited to replace Dr. Lynch. Instead, a team would be assembled to develop the next program, guided in general by the life cycle planning process described in this report. The team would be led by a strong, energetic, and committed facilitator. The intent is to ensure the program maintains its prestige, continues to attract high-potential participants, and thrives, but without replicating the current reliance on a single program leader to replace Dr. Lynch.

In this scenario, three partners would work out collaborative roles and responsibilities for the future Senior Fellows program and its funding model: Ithaca S+R, the IS department of GSEIS, and the UCLA Library. Guided perhaps by a memorandum of understanding (MoU) to define specific roles that play to their respective strengths and interests, the partners would share responsibility for setting strategic direction, identifying sources of funding, providing financial decision-making and administration, creating the 2018 Fellows curriculum and program, selecting the cohort, recruiting speakers, managing marketing and communications, administering the program, providing facilities, and so on. One of the partners, or perhaps the facilitator, would need to be identified to break ties and make final decisions about the program, for example about program fees, speakers, curriculum topics, etc.

The partners would need to devise a new financial model to reflect any new sponsored funding and to repurpose funds that are currently allocated to other uses such as paying the program director. It should be noted that the first year of using the team-based model might be the most costly, as the curriculum is

reviewed and refreshed for the 2018 and future programs, and other program improvements are put in place.

The facilitator-led, team-based model might be reviewed at the end of the 2018 program cycle to assess its success and determine the model's use in the future. Leading up to the 2020 program, it is possible that a further analysis of program benefits and costs will be warranted to consolidate and act upon lessons learned during the 2016 and 2018 program life cycles.

The next paragraphs offer ideas for the possible roles of the three partners.

Given its keen interest in supporting the next generation of academic and research library leaders, Ithaka S+R's role might begin with convening and charging a small group and selecting a facilitator. One of the group members might also have the role of a facilitator with decision-making authority. Alternatively, the facilitator might be an individual who is separate from the group—a person who is substantively neutral, whose chief concern would be on improving how the group works together and achieves its objectives.

This advisory council recommends that the group use the findings of market wants and needs identified in this report as the starting point to collaboratively develop an outline and details of the 2018 curriculum/topics and guest speakers. The intent would be to sustain as many current program strengths as possible, while integrating what this advisory group has learned and reported about past and prospective Senior Fellows' priorities for preparing senior academic library leaders (see "Market Needs and Wants" section).

The small group might be made up of three individuals representing the primary stakeholders (possibly a representative of Ithaka S+R, the chair of the IS department in GSEIS, and the UCLA University Librarian) plus one or two recognized, influential library thought leaders (who might also serve as guest speakers in the 2018 program). It would be important for the small group to also include at least one additional ARL director (current or recently retired) who has a keen sense of what is involved in library leadership positions; in fact, this person might also be considered for the facilitator role.

In the course of its work, the small group might also consider the other recommendations in this report, for example creating a program mission and vision statement and considering the feasibility of adding a mentoring element to the program.

If the *Collaborate* scenario is implemented as suggested here, Ithaka S+R, the chair of the IS department, and the UCLA University Librarian would have other defined roles in addition to participating in the collaborative program development team. Ithaka S+R, for example, might consider being a key resource for strategic planning, financial decision-making and management, selecting the cohort, marketing communications, and program assessment.

Possibly, the chair of the IS department, besides helping to shape the curriculum, might also serve as a resource for identifying and recruiting program speakers who are working on areas of research and emerging practice (e.g., research data management) that are of high interest to the 2018 Senior Fellows cohort. With an eye to a possible future role, the IS department chair might also wish to begin involving the new, tenure-track assistant professor of information studies specializing in Library Studies (LS) in planning and executing the 2018 Fellows program, once that person is hired. The IS department's position posting indicates a start date of July 1, 2016.

In addition to participating in the collaborative program development team, the UCLA Library might provide Fellows program facilities (meeting rooms, break-out spaces, etc.) in the Young Research Library, thus taking advantage of the library's modern design and technology-enabled collaborative spaces. Other UCLA Library roles besides helping to plan program content might include supporting program administration through the University Librarian's office, for example hosting the Fellows program website, planning and hosting the annual Fellows lunch, and co-facilitating the set-up and execution of the 2018 program.

If chosen, the *Collaborate* option might be announced in series of stakeholder communications, culminating in a joint press release by the partners.

Option 2: Enhance Current Position

In the *Enhance* option, Senior Fellows would continue as a biennial, cost-recovery, three-week residential program for a small cohort of individuals, planned and carried out using the life cycle process described in this report. The program would continue to be held at UCLA. The program would continue administratively within GSEIS and the IS department. The other primary stakeholder, should this option be chosen, might be the UCLA Library.

The immediate next step would be for the IS department chair and UCLA University Librarian to jointly convene and charge a small group of stakeholders to (1) review the Fellows curriculum; (2) develop new mission and vision statements for the Fellows program; (3) develop a plan to restore the program to cost-recovery while holding the line or lowering the 2016 program fee; and (4) develop and implement the 2018 Fellows program; and (5) make a recommendation as to the feasibility of appointing a new program director from within the IS department faculty. If this is not feasible, then recruiting a program director with the appropriate credentials would be necessary. The assumption of this option is that this individual would work under the same financial terms as Dr. Lynch has done (regular salary for working during the UCLA summer session or its equivalent; donated support during the remainder of the academic year).

In the *Enhance* option, the new partnership with the UCLA Library might be formed and implemented around using the Young Research Library facilities for the program (meeting rooms, break-out space, etc.), thus taking advantage of the library's modern design and technology-enabled collaborative spaces. The use of the library's facilities would be offered as in-kind support for the Fellows program. A memorandum of understanding (MoU) might define the respective roles of the IS department and UCLA Library in setting program direction, guiding ongoing Fellows program development, managing the program's financial aspects, selecting the cohort, etc. The MoU might specify that a program review would be carried out after the 2018 program.

The MoU might also indicate that the leadership team and staff of the GSEIS dean's office would continue to administer the financial aspects of the program, and that GSEIS would add responsibilities for hosting the Fellows program website and promoting the program through regular marketing communications. In addition, the GSEIS dean's or IS department chair's office might take on administrative support for the Fellows program director, absorbing that support into its own operations. The intent would be to address the current inadequacy of administrative, website, and marketing support for the program without further damaging the program's cost-recovery balance. Absorbing these program costs in some way is essential to restore the program to cost-recovery without raising the current Fellows program fee of \$9,000 per person. In fact, from a market perspective, it would be best if the program fee could actually be lowered for the 2018 program.

If chosen, the *Enhance* option might be announced in a series of stakeholder communications, culminating in a joint press release of GSEIS, the IS department, and the UCLA Library. The press release might mention the contribution of Ithaka S+R and this advisory council to planning for the transition of the Fellows program.

Option 3: Redesign

In the *Redesign* option, the current status of Senior Fellows as a biennial, cost-recovery, three-week residential program for a small cohort of individuals would be evaluated from the ground up, including whether to continue locating the program at UCLA. The primary stakeholders for this option would be Ithaka S+R, the Senior Fellows professional network, and (depending on the decision process of the redesign project) GSEIS/IS and the UCLA Library.

If the *Redesign* option is chosen, the next steps might include asking Ithaka S+R to convene and charge a second advisory council to (1) review and evaluate the possibility of re-siting the Fellows program at an ARL library with a history of support for the Fellows program; (2) review and evaluate the option of consolidating the Fellows program with another similar program in North America; (3) make a recommendation where to locate the Fellows program shortly after the 2016 program ends; (4) if the option of consolidating with another program is rejected, develop a full business plan and propose a funding model for the new Fellows program; (5) prepare and be ready to execute a market communications plan in conjunction with the new site or program; (6) as appropriate, identify the qualifications of a new program director and prepare a job posting; and (7) as appropriate, specify an approach for planning the 2018 program; and (8) as appropriate, gain approval for the new funding model and acquire program funding.

If chosen, the *Redesign* option would be announced in a series of stakeholder communications, culminating in a press release from Ithaka S+R. The development of the *Redesign* option would need to begin soon to assure the selected site or program consolidation can be announced shortly after the 2016 Fellows program ends. As appropriate, a second joint press release would be issued by late 2016 to announce the host site and program director, and the execution of the marketing communications plan would begin. Ithaka S+R and its partner(s) would aim to launch the redesigned program in 2018.

Consideration of the Options

Collaborate

A consensus has emerged among the members of the advisory council and key stakeholders Dr. Marcum, Dr. Lynch, and Dr. Furner around the *Collaborate* option. Its anticipated benefits are:

- Adding roles for Ithaka S+R and the UCLA Library that play to their respective strengths
- Retaining the program's location at UCLA (preserves and protects a distinctive feature of the existing brand) and the connection with UCLA's IS department
- Providing new sources of financial and in-kind support for the program, increasing the likelihood of the program's return to cost recovery balance without needing to increase participant fees
- Most likely option to mitigate a key risk (loss of the program's long-time, extraordinary leadership) while also sufficiently increasing the capacity to achieve program enhancements recommended in this report (improvement of Fellows brand awareness; expansion of target audience, renewal of mission and vision, using interview and survey results and new partners' ideas to build on strong program content and refresh curriculum/topics)
- The option's probable appeal to the Fellows professional network as a transition strategy from the 2016 to the 2018 program

- Most likely to ensure the success of the 2018 program while buying time for learning what works, in anticipation of a more complete transition for 2020 and beyond
- The idea of collaboration itself

The foremost risk of the *Collaborate* option may be that some or all of the anticipated benefits will not be realized. Other risks that were identified by advisory council members include the uncertainty associated with developing a new financial model for the program, potentially less clear authority for decision-making, the possibility that one or more partners' commitment will be insufficient for the Fellows program to become embedded institutionally (and thus unlikely to outlast the tenure of the individuals now involved), the necessity for another program evaluation to define the 2020 program and beyond, and some degree of loss of focus on what ARL directors believe is essential for developing research library leaders.

Enhance Current Position

The *Enhance* option is the least preferred of the three. While it has the benefits of retaining UCLA's involvement and adding strong participation from the UCLA Library, discussions with Drs. Furner and Lynch indicate there is no one currently on the existing IS department faculty with the desire and time to take on the leadership of UCLA Senior Fellows. The new assistant professor to be hired for the IS department's Library Studies track cannot be expected to take on these duties in the near term. It is uncertain that the history of inadequate financial and administrative support can be turned around, especially in light of this option's likely requirement to recruit and pay market value for a new program leader from outside UCLA—and furthermore, someone who will immediately be recognized and respected by existing and prospective Senior Fellows.

Redesign

The Redesign option has some support; a new beginning has an appeal that cannot be denied, and presumably choosing this option is likely to result in a shorter period of transition than the *Collaborate* option. Generally, however, the advisory council regards a wholesale program redesign as the riskiest and most labor-intensive option. Advisory council members noted that this option would require the most investment of time and effort, with an unpredictable degree of success among the program's existing target audience. The chair of the IS department at UCLA identified the *Redesign* option as the least desirable outcome by far. The Senior Fellows network may agree with him: some responses from the Fellows interviews suggested that removing the program's connection with UCLA might create a backlash in the Fellows network, and so that would be another risk to be managed, should the *Redesign* option be selected.

Next Steps

The essential next steps are:

1. ensuring that the 2016 program is successful
2. making a decision about how to structure, lead, finance, and create a plan of work for implementing the 2018 program
3. putting the pieces in place to develop and deliver the 2018 program

A new model and high-level plan of work for program development, delivery, and financial support (step 2) need to be decided, put in place, announced, and ready to launch by the end of UCLA's fiscal year (no later than June 2016).

Actual program development for 2018 (step 3) should begin by the third quarter of fiscal year 2016-17 *at the latest* (that is, no later than January 2017). An earlier start date, perhaps fall of 2016, would mitigate some of the inevitable risk associated with doing things in a new way.

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Appendixes

Appendix A: Senior Fellows Interviews

Interview Questions for Senior Fellows

1. What would you say are the major strengths of the current UCLA Senior Fellows program? What aspects of attending the program have been most helpful to you?
2. Can you think of any topics covered in the Senior Fellows program that you considered irrelevant or marginally important at the time, but gained importance after you became a dean/director?
3. What would you say are the major threats, limitations or internal barriers facing the UCLA Senior Fellows program? What aspects of the program could be improved?
4. Have you participated or contributed to other executive- or senior-level leadership programs?
 - a. If no – Move to question 5
 - b. If yes – Ask 4c and 4d -
 - c. Which ones?
 - d. Compared to those programs, what would you say is most distinctive about the UCLA Senior Fellows program?
5. Thinking more generally about library leadership development programs, what strategies, objectives, projects, or new initiatives should these types of programs pursue over the next five years?
6. Our advisory council will be conducting additional interviews of key stakeholders like prospective attendees at future Senior Fellows programs. Thinking over the librarians that you feel might benefit from and contribute to a future Senior Fellows program, please provide two or three names (even if you do not plan to actually nominate these individuals for the 2016 program). If we interview these individuals, we will not reveal your name.
7. The Center for Creative Leadership has identified a number of competencies for senior leaders of organizations of all types, among them self-awareness, influence, creating strategic alignment, creating a culture of innovation, catalyzing change, and leading outwardly (<http://www.ccl.org/Leadership/impact/individual.aspx> under “Leading the Organization - Competencies”).

What are some of the skills and competencies related to *leadership specifically in academic libraries* that participants in programs like UCLA Senior Fellows will need to develop going forward? Which of these skills and competencies will be most important and relevant to library leadership programs?

8. What have I not asked about that you expected I would?

Appendix B: Online Survey of Prospective Participants

About the survey

This online survey instrument was developed with SurveyMonkey and pre-tested with volunteers from the advisory council and Karen Calhoun's Senior Fellows cohort. An invitation and the survey link were sent to 55 individuals who had been identified by the Senior Fellows interviewees as candidates for leadership development programs targeted to senior and prospective library leaders. The survey ran from October 5 to 16, 2015 and resulted in 44 responses (an 80% response rate). Three-fourths of the respondents identified their libraries as ARL members, and one quarter identified their libraries as non-ARL.

SURVEY TEXT

Leadership Development Programs for Current and Prospective Library Leaders

Welcome and thank you for taking part in our survey. Your anonymous answers will help our advisory council to better understand participants in library leadership development programs and what they want.

Please complete the survey now if you can, but no later than October 16, 2015 by 11:00 pm US Eastern time.

It should take you about 10 or 15 minutes to go through the questions.

If you wish, you can complete a portion of the survey and return later to finish it. You can edit your answers until you finish the survey.

Thanks again and we look forward to seeing the survey results.

--Advisory Council, UCLA Senior Fellows Planning Initiative

Learning Outcomes

We're trying to learn what outcomes are most valuable for future participants in professional development programs for current and potential library leaders.

For this and the next question, please assume you have decided to attend a well-known program for academic library leaders, and respond to the question from that perspective.

1. Please prioritize the following potential LEARNING OUTCOMES in order of their benefit to you.

Choices:

Most beneficial

Moderately beneficial

Less beneficial

- Improve understanding of scholarly communication processes and implications for libraries
- Learn how to develop, inspire, coach and mentor others
- Learn negotiation, collaboration, and partnership skills
- Improve knowledge and understanding of financial decision making, budgets, budgeting
- Further develop my capacity to conduct and disseminate research in my field
- Improve my understanding and ability to use technology strategically

- Understand organizational culture and how to influence it; learn how to lead innovation and change
- Improve my ability to advance diversity and inclusion in library leadership, libraries, and higher education
- Improve knowledge and understanding of critical issues in higher education
- Know a set of core skills for leading an organization and be able to apply them
- Learn how to present myself; develop my own voice as a leader
- Learn about fund raising; what this role means and how to go about it

Program Outcomes

Once more, please assume you have decided to attend a well-known program for academic library leaders, and respond to the question from that perspective.

2. Please prioritize the following potential PROGRAM OUTCOMES in order of their benefit to you.

Choices:

Most beneficial

Moderately beneficial

Less beneficial

- Build lasting relationships with a small cohort of trusted peers who will function as my own network and learning community
- Take time away to step back from my workday mindset, focus on broader issues, and develop my own vision, goals, and/or action plan
- Be ready to undertake my own research project and disseminate the results
- Become part of a large, prestigious professional network of library leaders
- Become a more strategic thinker; broaden my perspective
- Become more politically savvy; improve my ability to initiate conversations and position the library strategically
- Prepare for a director or dean position: understand what the job entails, how to succeed, be ready to interview
- Build my self-awareness and confidence as a leader; assess and identify how to be more effective
- Help me decide whether to pursue a library dean/directorship

3. Are there other outcomes that would be valuable for you?

Choices:

Yes

No

If yes:

4. Please describe other outcomes that would be valuable to you.

Learning Environments

Assume you are in a face-to-face learning environment. What are your preferences for how the program is organized and carried out?

5. Please prioritize the following types of learning environments, with 1 being the most beneficial learning environment for you.

Choices:

- 1 Most beneficial
- 2 Moderately beneficial
- 3 Less beneficial

- A more structured learning environment with a curriculum using program faculty lectures, visiting speakers, instructor-led discussions, readings and assignments, etc.
- A less formal learning environment in a seminar setting, characterized by high levels of interaction among program participants, speakers, and program faculty.
- A mix of both.

Comments?

Pedagogical methods

Assume that you will be engaging in a program in which learning can occur before, during, and after the program. What pedagogical methods would be the most helpful?

6. Please prioritize the following possible pedagogical methods, with 1 indicating the methods that you find most beneficial.

Choices:

- 1 Most beneficial
- 2 Moderately beneficial
- 3 Less beneficial

- Professional mentoring and coaching during and/or after the program
- Post-program individual or group projects
- Field trips or site visits
- Shadowing or job exchanges during and/or after the program
- Presentations and lectures
- Case studies, problem solving
- Diaries, blogs, wikis, discussion boards
- Self-assessment tools
- Informal conversations with other program participants
- Group work and assignments
- Peer-to-peer coaching during and/or after the program
- Individual assignments, readings

Comments?

Familiarity with Leadership Programs

The next few questions explore your awareness of the leadership program options available to current and emerging academic library leaders, in particular those offered in face-to-face learning environments.

7. How familiar are you with library leadership development programs?

Choices:

Extremely familiar

Very familiar
Moderately familiar
Slightly familiar
Not at all familiar

8. When you think of library leadership development programs, what programs come to mind?

9. Which of the following programs for current and emerging leaders in academic libraries have you heard of? (Select all that apply)

Choices:

- ACRL/Harvard Leadership Institute for Academic Libraries
- ARL Leadership Fellows Program
- HBCU Library Leadership Program
- Leading Change/Frye Leadership Institute
- NLM/AAHSL Leadership Fellows Program
- UCLA Senior Fellows Program
- None of the above
- Other (please specify)
- ACRL/Harvard Leadership Institute for Academic Libraries
- ARL Leadership Fellows Program
- HBCU Library Leadership Program
- Leading Change/Frye Leadership Institute
- NLM/AAHSL Leadership Fellows Program
- None of the above
- Other (please specify)

10. Which of the following programs for current and emerging leaders in academic libraries have you attended? (Select all that apply.)

Choices:

- ACRL/Harvard Leadership Institute for Academic Libraries
- ARL Leadership Fellows Program
- HBCU Library Leadership Program
- Leading Change/Frye Leadership Institute
- NLM/AAHSL Leadership Fellows Program
- None of the above
- Other (please specify)
- ACRL/Harvard Leadership Institute for Academic Libraries
- ARL Leadership Fellows Program
- HBCU Library Leadership Program
- Leading Change/Frye Leadership Institute
- NLM/AAHSL Leadership Fellows Program
- None of the above
- Other (please specify)

11. How familiar are you with the UCLA Senior Fellows Program?

Choices:

- Extremely familiar
- Very familiar
- Moderately familiar
- Slightly familiar
- Not at all familiar

12. In the last year, how often have you heard other people talking about the UCLA Senior Fellows Program?

Choices:

- Extremely often
- Very often
- Moderately often
- Slightly often
- Not at all often or never

Your Plans

This section of the survey asks about your plans for engaging in a leadership development program in the future.

13. How likely are you to attend a library leadership development program in the next 1 to 3 years?

Choices:

- Extremely likely
- Quite likely
- Moderately likely
- Slightly likely
- Not at all likely

14. Please indicate the program(s) to which you plan to apply in the next one to two years, or for which you are already registered (Check all that apply)

Choices:

- ACRL/Harvard Leadership Institute for Academic Libraries
- ARL Leadership Fellows Program
- HBCU Library Leadership Program
- Leading Change/Frye Leadership Institute
- NLM/AAHSL Leadership Fellows Program
- UCLA Senior Fellows Program
- None of the above
- Other (please specify)

Program Information Needs and Preferences

We'd like to better understand what information you'd like to have when you consider leadership development opportunities, how and where you'd like that information delivered, and what pre-program information you'd like once you've registered for a program.

15. Please rank the following possible methods for learning about programs in your order of preference, with 1 being the method you like most.

Choices:

- Email
- Social media posts (Facebook, tweets)
- Slides, presentations
- The program's website
- Shorter articles (email news, blog posts, etc.)
- Program brochure (PDF)
- Videos (e.g., YouTube)

16. Once you are enrolled in a program, what materials would be the most beneficial to receive before attending? Please prioritize the following choices.

Choices:

- 1 Most beneficial
- 2 Moderately beneficial
- 3 Less beneficial

- Preprogram readings, self-assessments, or other preparatory assignments
- Information about the structure, content, and objectives of the program
- Information about program faculty
- Information about program accommodations, logistics, etc. (if applicable)
- List of current and/or past program participants

Comments? Other preferred information?

About You

We'd like to understand the factors that are the most important when you make a decision about attending a leadership development program.

17. Please choose from ONE to THREE factors that would have the MOST impact on your decision whether to attend a leadership development program.

Choices:

- Extremely important
- Very important
- Moderately important
- Slightly important
- Not at all important

- Institutional support for program costs, travel costs, and my time away
- Program length
- Length of travel to program (if applicable)
- My workload
- Reputation of program
- My commitments at home
- Program location(s) (at my location/nearby, at a conference, online, etc.)
- Size of program (number of attendees)

- Other
- Comments?

18. How important is program cost when choosing a leadership development program?

Choices:

- Extremely important
- Very important
- Moderately important
- Slightly important
- Not at all important

You're almost done! The next questions will help us understand a little more about you, then gather any other comments you care to share with us.

We really appreciate your taking the time to respond to this survey to better understand program participants and what they want.

19. Which of the following ALA types of responsibility best describes your current position level?

Choices:

- Director, university or college librarian, dean
- Deputy director, assistant or associate director or dean
- Department head or equivalent
- Librarian (Nonsupervisory)
- Librarian (Supervisor of staff)
- Other (please specify)

20. If you had the opportunity to attend UCLA Senior Fellows, with your institution covering the costs, how interested would you be in attending?

Choices:

- Extremely interested
 - Very interested
 - Moderately interested
 - Slightly interested
 - Not at all interested
- Comments?

21. Which of the following describes your library's relationship to the Association for Research Libraries (ARL)?

Choices:

- ARL member
- Not an ARL member
- Other (please specify)

22. Do you have comments, concerns, or recommendations to share about library leadership development programs?