Final Report

Leadership and Management Section of the
Medical Library Association

Professional Development for Current and
Aspiring Middle Managers (PDCAMM) Task Force

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Executive Summary

The charge of the PDCAMM Task Force was to find a feasible way to give aspiring middle managers the needed experience to be promoted and to give current middle managers ways to fill in their experience gaps and prepare for the next step to upper management.

Conclusions
There is indeed a gap in management professional development programs that needs to be addressed. In particular, new middle managers need support with regard to practical skills.

Upper managers filling positions do not view experience and qualifications the same way that the applicant pool does. There is a need for increased communication of true expectations and assumptions of both sides.

Aspiring managers would like more information on professional development opportunities available through MLA and other channels. Many never use the MLA CE Clearinghouse because they find it difficult to use or not current.

Time and funding are issues, but not insurmountable ones.

Recommendations
- MLA should seek partners and funding for a career development initiative for health sciences library management
- MLA should sponsor the development of CE courses which address operational management skills, targeted to new and potential supervisors and managers, including
    - Adopting or sponsoring courses already developed by other professional associations
    - Making it easier to find out what relevant classes are offered at the chapter and regional levels and by other associations
    - Refining and redesigning the MLA Clearinghouse database.
    - Looking at other associations to see how they market and brand their CE courses.
- MLA should promote participation in employer in-house management programs and give AHIP points for such programs as a whole as well as individual classes
- MLA should expand its mentoring program, and consider the development of a competitive program for management development such as a leadership institute or internship
- MLA should recruit additional mentors and provide guidelines and support for those who want to be mentors
- The Leadership and Management Section, with support from MLA, should continue its efforts in this area by
    - creating or sponsoring a program on career development
    - developing a list of health sciences library management competencies
    - recommending a model for a library management professional portfolio

Statement of the Issue
(Originally published in the September 2004 MLA News)

In 2002, the National Library of Medicine and the Association of Academic Health Sciences Libraries began the Leadership Fellows Program. The program provides leadership training, mentoring, and networking opportunities to potential future directors of academic health sciences libraries while indirectly generating broader interest in library directorships.

The Leadership Fellows Program has been successful and well received in the academic library world, but it only addresses concerns at one point of the job spectrum, the director's position. Other management positions in health sciences libraries also need candidates with strong management skills. Middle managers play a crucial role in accomplishing the missions of our libraries, and good managers in these positions are essential.

Upper managers frequently express concern that they do not get sufficient numbers of qualified candidates for their open middle management positions. Although librarians are interested and the positions are well advertised, applicants and potential applicants alike complain that they cannot obtain management positions, because they do not have previous supervisory experience. The question is often posed: "How do you get supervisory experience when no one will hire you unless you already have supervisory experience?"

At MLA '03, Melissa De Santis, AHIP, and Tania Bardyn, AHIP, at that time both at the Briscoe Library, University of Texas Health Sciences Center–San Antonio, spoke on "Medical Library Middle Managers: Challenges and Opportunities" and presented the results of their survey of middle managers in health sciences libraries. In addition to enumerating many of the challenges facing middle managers, the survey also asked about preparation. Not surprisingly, 73% felt that library school did not prepare them for their positions. Of even more concern was that 64% felt they had no mentors, 34% were unsure of whether they could advance in their careers without leaving medical librarianship, and 11% were certain they could not advance in their careers without leaving medical librarianship.

Those who were present at the MLA '04 session, "Morning of Innovation: Seize the Power of the Next Generation," heard the frustration of some of the new members of our profession, librarians who felt unheard or unheeded and saw limitations rather than opportunities.

While different in content, all of these concerns reflect a lack of consensus about professional development for middle management positions in health sciences libraries. MLA has numerous initiatives in mentoring, continuing education, certification, and recruitment and retention. However, despite their value, none of them address this issue specifically in an organized way.

Background and Approach

At the 2004 MLA Annual Meeting in Washington, DC, during an open forum, there was a lively discussion about barriers to professional advancement. How do you get experience for a job that you can only get if you have experience? LMS has a natural interest in addressing this question. Aware of the aspiring Library Director Leadership Fellows program sponsored by the National Library of Medicine and the Association of Academic Health Sciences Libraries, LMS saw a gap in leadership education that needed to be addressed. At the same 2004 Meeting, the LMS Executive Committee enthusiastically endorsed incoming chair Jane Blumenthal's goal to address this gap in available professional development opportunities specific to the needs of current and aspiring middle managers. After the meeting, the Professional Development for Current and Aspiring Middle Managers (PDCAMM) Task Force was immediately appointed and charged to investigate the issue and propose effective solutions.

The charge of the newly formed PDCAMM Task Force was to find a feasible way to give aspiring middle managers the needed experience to be promoted and to give current middle managers ways to fill in their experience gaps and prepare for the next step to upper management. A core group of task force members and an advisory group were formed. The advisory group was established to provide feedback and guidance at critical stages. The advisory group is made up of individuals with extensive experience working with similar initiatives and has connections to other MLA Sections. The core working-group of the PDCAMM Task Force was initially broken into teams to address three general questions:

- What do current and aspiring middle managers want (or need) for professional development and in what format do they prefer to receive the education?
- What exists now for professional development opportunities to meet these needs and are they feasible options for MLA's membership?
- What are the possible models for delivery of a PDCAMM education program and what resources would be needed for each model?

To give shape to the issue during this process, a literature search of the library science and business literature was performed. Much was found in the business literature and an annotated bibliography can be found in Appendix F. In particular the book, *Transitioning from Librarian to Middle Manager*, by Pixie Ann Mosley was helpful and interesting. In addition to the literature search, a presentation by Melissa de Santis and Tania Bardyn at the MLA Annual Meeting in San Diego, May 2003, *Medical Library Middle Managers: Challenges & Opportunities*, was of great assistance in giving shape to the Task Force.

A survey was conducted using Zoomerang.com during 2005, and data collected from four groups, current middle managers, persons aspiring to middle management, those not aspiring to middle management, and upper management. Initial survey data was compiled and presented at both the LMS annual business meeting during the 2005 MLA

Annual Meeting and at an open forum on recruitment and retention, "Nurturing the new, supporting the experienced: MLA recruitment and retention initiatives."

During the 2005 Meeting in San Antonio, TX, incoming LMS Chair, Anne Linton, renewed the charge to the Task Force for the second and last year. During 2005 and 2006 additional analysis was completed of the survey results and focus groups were utilized to fill in some areas left open by the survey results. The Task Force's conclusions and recommendations were presented at an open forum, "Developing Middle Managers: What We Learned and Where We are Going," during the 2006 MLA Annual Meeting. The open forum allowed for additional discussion of the Task Force's conclusions.

Task force activities included:

- Defining and exploring the parameters of the task force mission
- Performing literature searches in both the LIS and management literature
- Investigating and recording professional development opportunities at similar organizations
- Investigating entities for possible future collaboration
- Developing and completing a survey directed towards four groups, current middle managers, persons aspiring to middle management, those not interested in middle management, and upper management
- Compiling and presenting initial data at the 2005 MLA Annual Meeting
- Performing in-depth analysis of survey results
- Conducting focus groups to gather additional information
- Researching leadership and management CE database possibilities
- Developing recommendations for both LMS and MLA

Survey Analysis

The Task Force collected survey data from four groups, current middle managers, persons aspiring to middle management, those not aspiring to middle management, and upper management. The complete results from the surveys of the four groups, current middle managers, persons aspiring to middle management, those not aspiring to middle management, and upper management, can be found in PDF form at the Leadership and Management Section website: http://www.lms.mlanet.org/PDCAMMTaskForce.html.

The Task Force closed its survey on February 28, 2005, having received more than 900 responses. This included over 400 people identifying themselves as current middle managers and more than 165 who identified themselves as aspiring middle managers. The chart below shows the basic demographics of the four groups surveyed.

	non aspiring	aspiring	current middle managers	upper level managers
# respondents	176	167	401	185
full time (% yes)	83%	91%	95%	99%
Job titles key words*	23	27	275	178
MLS Degree % yes	88%	89%	96%	95%
length of employment:				
3-5 years	16%	28%	5%	4%
6-10 years	17%	25%	14%	8%
11-15 years	14%	15%	16%	13%
16-20 years	15%	5%	15%	16%
21-25 years	15%	5%	18%	22%
more than 25 years	17%	7%	30%	38%
Type of library work in:				
academic med center	41%	56%	41%	45%
teaching hospital	14%	15%	24%	17%
non-teaching hospital	11%	5%	13%	7%
* coordinator, senior, manager, director or head used in title				

When reading the comments that follow, keep in mind that it was left up to the survey takers to identify themselves as middle or upper management. This can mean very different things in an academic library and a hospital library and in addition is subject to individual interpretation. Also, many more academic librarians responded and their responses may reflect different needs from those of hospital librarians.

The analysis also noted the number of survey participants employed in a library more than 25 years, confirming the projection that we will see many retirements from the profession in the near future.

Current and Desired Skills

To determine the focus of future training efforts, four questions were posed to survey participants. First, Current Middle Managers and Upper Managers were asked a question regarding the skills necessary for advancement in management. Second, Aspiring and Current Middle Managers were asked a question about their existing skill levels. Additionally, each of the four groups was asked a question about their training needs. Finally, Upper Managers were asked which topics would be critical in a management certificate program.

In response to the questions about necessary skills for advancement, there was a considerable amount of consensus between the groups (Table 1). Both Current Middle Managers and Upper Managers felt that communication, decision-making, delegation, and conflict management skills were important to those seeking advancement in management. Additional skills identified as important to Aspiring Middle Managers were organizational skills, and skills for managing/affecting change. Additional skills identified as important to Current Middle Managers seeking advancement include financial management and budgeting.

Table 1: **Skills for Advancement (Top 5)**

	Identified by Aspiring Middle Managers	Identified by Current Middle Managers	Identified by Upper Managers
Aspiring Middle Managers			
Communication Skills	65%	67%	77%
Decision Making Skills	47%	40%	38%
Conflict Management	36%	37%	34%
Organizational Skills	N/A	N/A	34%
Managing/Affecting Change	28%	27%	29%
Delegation	30%	31%	N/A
Current Middle Managers			
Communication Skills	N/A	N/A	68%
Decision Making Skills	N/A	N/A	49%
Conflict Management	N/A	N/A	39%
Delegation	N/A	N/A	27%
Financial Management/Budgeting	N/A	N/A	27%

By comparing the skills identified as necessary for advancement with the existing skills identified by Aspiring and Current Middle Managers (Table 2), certain knowledge gaps were identified. Both Aspiring and Current Middle Managers felt they have some foundation in the skills identified as important for advancement, including communication, organizational, and decision making skills. However, the Aspiring and Current Middle Managers did not feel they had sufficient skills in other areas deemed important for managers. These include conflict management, delegation, financial management/budgeting, and managing/affecting change.

Table 2: **Existing Skills (Top 5)**			
Aspiring Middle Managers		**Current Middle Managers**	
Communication Skills	50%	Communication Skills	46%
Decision Making Skills	34%	Decision Making Skills	35%
Listening Skills	34%	Listening Skills	37%
Organizational Skills	34%	Hospital Library Management	29%
Presentation Skills	30%	Organizational Skills	26%

Each of the four groups was also asked about desired topics for training (Table 3). All groups indicated an interest in receiving training on how to manage/affect change. Aspiring and Current Middle Managers had similar interests in training topics, including conflict management, financial management/budgeting, managing/affecting change, project management, and strategic planning. Those not aspiring to management and Upper Managers had interests that separated them from the Aspiring and Current Middle Manager groups. Of particular interest to this study are Upper Managers, who indicated they would like additional training on fundraising, grant writing, and marketing.

Table 3: **Desired Training Topics by Group (Top 5, Including Ties)**

	Not Aspiring to Management	Aspiring Middle Managers	Current Middle Managers	Upper Managers
Assertiveness	X			
Communication Skills	X			
Conflict Management	X	X	X	
Decision Making		X		
Financial Management/ Budgeting	X	X	X	
Fundraising				X
Grant Writing	X			X
Managing/Affecting Change	X	X	X	X
Marketing				X
Negotiation		X		
Presentation Skills	X			
Power Influence and Promotion			X	
Project Management		X	X	
Strategic Planning		X	X	X

Upper Managers were also asked about the skills they felt would be most important to include in a management certificate program. The top five critical areas identified by Upper Managers include: communication skills (53%), financial management/budgeting (51%), conflict management (41%), decision making (39%), and managing/affecting change (33%). The results of this question closely match the responses to the question about the necessary skills for advancement.

The results from the questions on existing skills, skills needed for advancement, and desired training topics indicate a clear direction for the content of the training

opportunities recommended by this group. They also indicate the different skills that should be emphasized during each career stage, supporting training recommendations for Aspiring Middle Managers, and Current Middle Managers looking to move to upper management.

Additional Observations from the Survey

Aspiring to Middle Management Survey

The Aspiring group made up the largest group working in an academic setting. The primary barrier to promotion is lack of opportunity in current institution. Some of the respondents are interested in a management certificate program.

Current Middle Manager Survey

The Current Middle Managers were the largest group of respondents by a huge number. 30% of responding middle managers have been employed in a library more than 25 years. This group also had the largest number working in a non-teaching hospital (as opposed to an academic medical center) than any other.

Interest was expressed in management and leadership training. The reasons varied for not pursing an upper management position; enjoy current career track, time considerations, family considerations, lack of opportunity in current institutional environment, and inability to relocate.

Upper Management Survey

The Upper Management are half as likely to be on a second or third career than any other group. 38% of these respondents have been employed in a library more than 25 years. There is some interest in providing management and leadership training to individuals aspiring to become middle managers and to current middle managers wishing to move up. These Upper Managers feel the best method of acquiring management skills is through practical experience and mentoring. They responded that a management certificate program might be helpful.

Summary of Comments Section to Final Questions

Below is a summary of the comments section of the survey, arranged by category (Upper Management, Non-Aspiring to Management, Current Middle Managers, and Aspiring to Middle Management). The comments provide useful suggestions on training methodology and content for acquiring and further developing necessary management skills. Additionally, those who aspire to middle management are interested in affordable opportunities for advancement. In particular, comments suggest that mentoring is a desirable venue for training.

Upper Management Responses:

There were 32 responses received from this group, with 23 of them useful. Others consisted of general comments about the survey, or complaints about lack of opportunities, etc.

The comments can be generalized to two types: those discussing desired content of educational sessions, and those discussing methodology or pedagogy of such offerings.

Although there were many interesting and thoughtful responses, when looking for trends the following emerged: 13% suggested MLA look to other organizations and programs such as SLA, AMA, or ACRL for good models. It was also suggested that we look to general business training, since basic management skills should be transferable between organizations.

When it comes to methodology, many felt there should be a variety of offerings. The largest category of responses, though, was for mentoring, with 26% of those useful responses mentioning mentoring as either the primary method to gain management experience, or as a supplement to more formal training. 7% of respondents mentioned cost as an issue, suggesting that offerings be either free, or that fellowships be offered to offset costs.

One quote serves as an illustration of the type of responses received: "I think some useful skills should be developed early in every librarian's career – communication skills, problem solving, and goal development for example. Other types of training like managing multiple priorities are best done initially in a seminar or other CE and then with a mentor who will provide support as the individual works through issues in their work place. A lot of management issues cannot be anticipated or prepared for – therefore it is very important for the librarian to have a mentor who can help as situations arise."

Not-Aspiring to Management Responses:

There were a meager 17 comments received from this group, with approximately 13 of them useful.

Consensus in regards to content and methodology were not as apparent in this group. There were several comments about the prohibitive costs of attending CE classes at the annual MLA meeting, with a plea for inexpensive, local, classes of short duration.

Many of the respondents voiced their concern about lack of opportunities or other frustrations with their current position but felt that management training needed to be offered.

A representative comment was this one: "I'm usually in the role of solo librarian and/or consultant, which makes me my own manager. What I lack are some of the skills such as budget, strategic planning, personnel reviews, facilities planning, etc. Managing a

library and staff is not a problem, the skills to run more than a solo or part-time librarian position is what I would need and be most interested in when it comes to CE courses and additional training opportunities." Also, another comment was illustrative of the feelings expressed by this group: "I think technology and better communications capabilities have minimized the importance of middle management in a flatter organization. For the fewer middle managers we do need, there should be better ways to identify and train people to be in that role. Also, leadership can happen outside of middle management…"

Current Middle Managers Responses:

There were 50 responses received from this group; 18 of these responses were useful, in that they provided constructive feedback about suggestions, directions, etc. (as opposed to general comments about the survey tool, or complaints/statements about lack of opportunities, individual problems and issues, etc.)

The comments were for the most part focused on methodology of training and educational offerings. There was no particular trend toward one venue over another, but rather a range of suggestions including MLIS/MBA degree programs, partnering with other professional library organizations, mentoring, local educational meetings, and interactive discussions.

There were several comments about the need for more middle management opportunities and training needed to move into a higher level position. One comment which addressed this noted, "I am not interested in more training for middle management positions – I want training to move UP the ladder."

There was basically one comment that addressed desired training content: "Discussion of a) leader vs. manager/director roles and b) management styles and examples within and outside the library field would all be helpful."

Aspiring to Middle Management Responses:

There were 31 responses received from this group; 13 of these were useful in that they provided constructive feedback about suggestions, directions, etc.

Comments can be generalized into two types: those discussing the desired content of educational sessions, and those discussing methodology or pedagogy of such offerings.

There was no particular trend toward one venue over another for training methods, but rather a range of suggestions that include: joint MBA/MLS degrees, scholarships/fellowships, mentoring, job shadowing, web-based conferences, and an MLA management certificate program. One individual noted, "I've applied for two semi-management positions in the past year. In both, what's been the major factor in my *not* getting the position is either lack of supervisory experience or lack of experience leading people and projects. Mentoring (or other help) in how to acquire those skills when you're in a non-management position would be very helpful."

The two comments which address content of training offerings, suggested supervisory skills, leading people, financial/budgeting, strategic planning, and dealing with hospital/academic administrators.

Conclusions from Survey Analysis

There is a great desire for more management training and the expressed need for communication skills is high on each survey. Upper level managers, in particular, indicated the importance of financial planning/budget. Big deterrents to moving up in management are a lack of opportunity in the current institution and the inability to relocate. "Have skills, waiting for someone to die." The supervisory aspect of management discourages many people from moving into management positions. In addition, a significant number of librarians have taken on management responsibilities and found that they did not want to pursue this career path.

In general, directed e-mail is the first choice for finding out about management training opportunities, course length should be 4 hours (1/2 day) or all day, and the best training methods – hands on, seminar, workshop, mentoring.

Focused Interviews

Originally, the Task Force had hoped to conduct focus groups to drill down into the survey results and gather additional information from upper managers, middle managers, and non-managers new to librarianship and interested in a management career track. Logistical difficulties prompted a change in plan to focused interviews, using the same questions as for a focus group, but conducted by phone one-on-one.

The focused interviews took place between March 27 and May 9, 2006 and were conducted and recorded by Jane Blumenthal. The interviews and data collection were approved by Georgetown University Medical Center's IRB. The scripts for the interviews are included in Appendices B through D, however, to maintain confidentiality, neither the recordings nor the transcripts were kept after the writing of this report.

Interview Analysis

In general, the focused interviews confirmed the survey results. There were clear areas of consensus among the participants.

Participants at all levels of management and experience confirmed the need for additional management education opportunities and the importance of communication skills to middle managers. However, current and aspiring middle managers identified hands-on operational financial/budgeting and personnel management skills as those they most needed to develop. Upper and current managers also commented that much of budgeting and personnel management is institution specific and that in-house training is necessary; aspiring middle managers felt a greater need for general training in these areas. In

general, upper managers had greater confidence in the ability of new middle managers to learn these skills on the job than the current and aspiring middle managers themselves did. Management skills were seen as transferable between hospital and academic libraries, however, all felt that there were significant differences in culture and nature of work between the two.

Mentoring was recognized as an important part of management development by all three groups. Despite this importance, some participants felt that having a mentor was a matter of luck and that mentoring often was inconsistent or unavailable, especially to librarians in smaller organizations.

Most of the current and aspiring middle managers identified with the "Catch-22" scenario mentioned above and could provide specific examples of encountering that frustration during some aspect of a job search. Upper managers were much more likely to indicate that there were other ways to demonstrate management ability, such as project management, leadership roles in professional or community organizations, or non-library work experience. All agreed that classes alone were not sufficient.

Participants liked the idea of a list of management competencies and assessment measures that both applicants and employers could use to demonstrate or evaluate management and supervisory skills. The various suggestions made by the committee (classes, certificate, institute, portfolio, enhanced mentoring, and menu of choices) were all seen as potentially effective and helpful but there was also a strong opinion that a combination of approaches was required.

Upper managers indicated a willingness to support a professional development program for new and potential library middle managers with both funding and release time. Current and aspiring managers agreed that their institutions would likely support such a program. Other points raised in this regard were that it was more difficult for small organizations to allow librarians time away from work and that hospitals and for-profit organizations were more likely to fund participation in a program that was directly relevant to a librarian's current position than they were to fund general library or management education. There was some concern that it would be difficult to get funding for attending MLA annual meetings as well as to attend CE programs at a separate time.

Conclusions from Focused Interviews

There is indeed a gap in management professional development programs that needs to be addressed. Time and funding are issues, but not insurmountable ones. Additional continuing education classes focused on practical management skills such as budgeting and personnel management are necessary and important, but more there is also interest in a more in depth, longitudinal program that would provide a combination of classes, mentoring, and career guidance.

Upper managers filling positions do not view experience and qualifications the same way that the applicant pool does. There is a need for increased communication of true expectations and assumptions by both sides.

Continuing Education Database Analysis

One team from the PDCAMM Task Force was charged to research what other sections and MLA are doing regarding CE databases and then propose if, and how, LMS should move forward in providing a CE leadership and management database resource to the membership.

Research: The team met via conference call on three separate occasions to discuss how best to research what the sections and MLA are doing regarding CE databases. We wanted to determine if the sections are using the MLA CE Clearinghouse website, and if so, how they are using the Clearinghouse to get information about CE to their section. We also wanted to know if the sections believe that a centralized CE database is beneficial to the members.

The team developed a mini-survey with each team member choosing 4-5 MLA sections to contact via e-mail. The e-mail was sent to each section president or list of officers. The following questions were based on the charge that was given to us.

1. Do you have professional development opportunities for your section?
2. Does your section offer CE courses?
3. How do you provide access to CE courses?
4. How do you promote CE courses to section members?
5. Does your section have a CE database?
6. Are you interested in a centralized database for CE courses?

For complete database survey results see Appendix E.

Results CE Database Survey

Twelve sections responded to the mini-survey. The survey reveals that many sections notify their members about CE but there is not a lot of activity or current involvement with CE in the sections. Answers to the questions:

Do you have professional development opportunities for your section?
      5 sections indicate opportunities at the Annual Meeting
      4 sections: YES
      3 sections: NO

Does your section offer CE courses?
      8 sections: NO
      1 section: YES
      3 sections: Yes, via journal clubs, at annual meeting or by individual members

How do you provide access to CE courses? How do you promote CE courses to section members?

These questions seem redundant now. Basically, the sections do make some sort of announcement but do not actively encourage CE or have a formal structure to getting out the information.

Does your section have a localized CE database?
        No section has its own database

Are you interested in a centralized database for CE courses?
        2 sections: NO
        10 sections: YES

Conclusions from CE Database Survey

From some of the comments, many section officers do not put together CE for their sections. It seems that the Annual Meeting is the best place to obtain CE classes. It appears that many members never use the CE Clearinghouse on the MLA database.

Recommendations

The Task Force recommends that

- MLA should seek partners and funding for a career development initiative for health sciences library management

- MLA should sponsor the development of CE courses which address operational management skills, targeted to new and potential supervisors and managers, including
  - Adopting or sponsoring courses already developed by or for other professional associations such as SLA; publicizing the ability to get AHIP points for participation in these programs
  - Making it easier to find out what relevant classes are offered at the chapter and regional levels and by other associations
  - Refining and redesigning the MLA Clearinghouse database. (It's too difficult to use and out of date. Needs to be more "user-friendly.")
  - Making the process of entering CE information into the Clearinghouse easier so people will be willing to include more courses they have taught.
  - Looking at other associations to see how they market and brand their CE courses.

- MLA should promote participation in employer in-house management programs and give AHIP points for such programs as a whole as well as individual classes

- MLA should expand its mentoring program, and consider the development of a competitive program for management development such as a leadership institute or internship

- MLA should recruit additional mentors and provide guidelines and support for those who want to be mentors

- The Leadership and Management Section, with support from MLA, should continue its efforts in this area by
  - creating or sponsoring a program on career development *per se* and offering it periodically without charge at national and local meetings
  - developing a list of health sciences library management competencies and skills with assessment measures or developing a list of criteria for demonstrating competency in health sciences library management
  - recommending a model for a library management professional portfolio (content and format) anchored in those competencies

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Appendix A - PDCAMM Survey Results

The complete results from the surveys of the four groups, current middle managers, persons aspiring to middle management, those not aspiring to middle management, and upper management, can be found in PDF form at the Leadership and Management Section website: http://www.lms.mlanet.org/PDCAMMTaskForce.html.

Appendix B - Upper Managers Focused Interview

Welcome & Ground Rules

Hello, [name]. This is Jane Blumenthal. Thank you for agreeing to be interviewed and for providing input to the Medical Library Association's Task Force on Professional Development for Current and Aspiring Middle Managers (PDCAMM).

As a member of the task force, I am collecting information about the knowledge and experience needed by entry level librarians to successfully move into middle management positions. This information will be used to make recommendations to MLA and its Leadership and Management Section about professional development programs targeted to this segment of the library profession.

Although I am a member of the task force, you should view me as an objective third-party. Neither I nor the task force has a preconceived idea of what the appropriate recommendation will be. Your comments will contribute to our thinking about this issue and will influence our final report. The task force report will include the names of all the interviewees, but will not attribute specific comments, positive or negative, to any individual. I am therefore asking you to be complete, open, and honest about your opinions as you give your answers.

Before we begin, I would like to explain a few things about how the discussion will work.

- The questions I'll ask you today deal with three areas: First, your perceptions of and opinions about the education and experience needed by new middle managers in libraries, second, how entry level librarians can get the appropriate experience, and third, what professional development programs would be useful to early-career librarians who want to move into management positions.

- I will be asking the same questions in all of the interviews of senior managers. In order to get through all of the questions while being respectful of your time, I have allocated a certain amount of time for each section of questions. I ask that you bear with me if I need to interrupt or redirect the conversation to stay within the time limits.

- I will be recording this interview so that I do not have to take notes as we talk. After our discussion, my assistant will transcribe the tape and I will write a summary report of all the interviews using the transcripts and recordings. All of the tapes will be kept completely confidential and will be discarded after they are transcribed.

- Because I am taping, it is important that you speak clearly and distinctly. I may occasionally interrupt you to ask that you repeat a remark or clarify what you have said. I need to be sure that all responses are accurately recorded.

Questions

1. To start our discussion, please tell me a little about yourself and your library. I'd like to know 1) your current position, 2) how long you have held it, 3) how large your library is, and 4) whether you are in a public or private institution.

2. How many middle managers report to you?

Now let's move into our first section. I will be asking you to consider middle managers. Specifically, I'd like you to consider the skills, education, and practical experience you seek in middle managers.

Skills, Education, Practical Experience

1. Consider the most successful middle managers who have reported to you. What were key attributes of their success?

2. Consider your least successful middle managers. Why did they have problems?

3. Other than an MLS or equivalent degree, in your opinion, what specific education is needed for library management positions?

4. What background or experience do you think is essential for someone who wants to move into a library management position? What kind of experience and for how long?

5. What advice would you give a hospital librarian who wants to move to an academic library? Or vice versa?

6. Thinking about your own career path, what contributed to your success? What do you wish you had done differently?

Now let's move into our second section. This group of questions focuses on professional development opportunities that might be created for aspiring middle managers.

Professional Development

At the Open Forum on Recruitment and Retention during the 2004 MLA annual meeting, several young librarians described their frustration in seeking a management position, saying that most if not all require applicants to have prior management or supervisory experience. In designing a professional development program for new or aspiring managers, how would you address the following issues?

1. In your opinion, how can young professionals get appropriate experience if they are not in supervisory positions?

2.   What types of non-work experience do you believe might substitute? How much of this type of experience do you believe would be sufficient? How do you believe it could it be documented?

3.   In your opinion, what role does mentoring play in management development? How formal do you believe the mentoring relationship needs to be? What documentation would be needed?

4.   Do you believe continuing education classes targeted to middle management knowledge and skills would be helpful? What kind/how many? Does there need to be a certificate program? Exam? How would you measure actual learning vs mere attendance?

5.   Would a list of middle management competencies and assessment measures be useful to you as a senior manager?

6.   Would such a list be an effective guide for career development for aspiring middle managers?

7.   If MLA supported a repository of structured professional portfolios, would you use the information in them to inform hiring decisions? In your opinion, what would a portfolio need to include to be useful for this purpose?

8.   Are you familiar with the NLM/AAHSL Leadership Fellows Program? [If not, explain briefly.] Do you believe a similar program would be useful for developing the next generation of middle managers? Is such a program practical?

The final category of questions relate to your willingness to support professional development opportunities that are being considered by the MLA and LMS.

Support Issues

1.   If MLA or LMS sponsored a professional development program for middle managers, would you support it by
   - Participating as a mentor?
   - Participating as an instructor?
   - Encouraging your staff to participate?
   - Considering participation when hiring?

2.   How much funding would be reasonable to provide for a
   - Mentoring program
   - Individual CE classes
   - Certificate program
   - Professional portfolio

3.　　　How much release time would be reasonable to provide for a
- Mentoring program
- Individual CE classes
- Certificate program
- Professional portfolio

Thank you for participating. I am now going to turn the recorder off and you may make off the record comments about the survey. These comments will not be influence in any way in the recommendation made by the task force, but are simply an opportunity to comment on the process.

Appendix C - Middle Managers Focused Interview

Welcome & Ground Rules

Hello, [name]. This is Jane Blumenthal. Thank you for agreeing to be interviewed and for providing input to the Medical Library Association's Task Force on Professional Development for Current and Aspiring Middle Managers (PDCAMM).

As a member of the task force, I am collecting information about the knowledge and experience needed by entry level librarians to successfully move into middle management positions. This information will be used to make recommendations to MLA and its Leadership and Management Section about professional development programs targeted to this segment of the library profession.

Although I am a member of the task force, you should view me as an objective third-party. Neither I nor the task force has a preconceived idea of what the appropriate recommendation will be. Your comments will contribute to our thinking about this issue and will influence our final report. The task force report will include the names of all the interviewees, but will not attribute specific comments, positive or negative, to any individual. I am therefore asking you to be complete, open, and honest about your opinions as you give your answers.

Before we begin, I would like to explain a few things about how the discussion will work.

- The questions I'll ask you today deal with three areas: First, your perceptions of and opinions about the education and experience needed by new middle managers in libraries, second, how entry level librarians can get the appropriate experience, and third, what professional development programs would be useful to early-career librarians who want to move into management positions.

- I will be asking the same questions in all of the interviews. In order to get through all of the questions while being respectful of your time, I have allocated a certain amount of time for each section of questions. I ask that you bear with me if I need to interrupt or redirect the conversation to stay within the time limits.

- I will be recording this interview so that I do not have to take notes as we talk. After our discussion, my assistant will transcribe the recording and I will write a summary report of all the interviews using the transcripts and recordings. All of the recordings will be kept completely confidential and will be discarded after the report is written.

- Because I am recording, it is important that you speak clearly and distinctly. I may occasionally interrupt you to ask that you repeat a remark or clarify what you have said. I need to be sure that all responses are accurately recorded.

Questions

1.	To start our discussion, please tell me a little about yourself and your library. I'd like to know 1) your current position, 2) whether you are in a public or private institution, and 3) how large your library is.

2.	To whom in your organization do you report? How many employees report to you?

Now let's move into our first section. I will be asking you to consider your preparation to be a middle manager. Specifically, I'd like you to consider the skills, education, and practical experience you found helpful as you answer these questions.

Skills, Education, Practical Experience

1.	What has contributed to your success as a middle manager?

2.	What areas of management have given you the most problems?

3.	Is there anything you wish you had done differently in preparation for your current position?

4.	Other than an MLS or equivalent degree, in your opinion, what specific education is needed for library management positions?

5.	What background or experience do you think is essential for someone who wants to move into a library management position?

6.	In your opinion, how transferable are management skills between hospital and academic libraries? What are the specific differences and how would you advise a librarian changing institutions to prepare?

Now let's move into our second section. This group of questions focuses on professional development opportunities that might be created for aspiring middle managers.

Professional Development

At the Open Forum on Recruitment and Retention during the 2004 MLA annual meeting, several young librarians described their frustration in seeking a management position, saying that most if not all require applicants to have prior management or supervisory experience, putting them in a Catch-22.

1.	In your opinion, is this a valid observation?

2.   Did you personally experience this frustration in job searches leading up to your present position?

3.   How would you advise a young professional to get appropriate experience if he or she is not currently in a supervisory position?

4.   Are there types of non-work experience you believe might substitute? How do you believe this could it be documented?

5.   In your opinion, what role does mentoring play in management development? How formal do you believe the mentoring relationship needs to be? What documentation would be needed?

6.   Do you believe continuing education classes targeted to middle management knowledge and skills would be helpful? Does there need to be a certificate program or competency exam? How would you measure actual learning vs. mere attendance?

7.   In your opinion, would a list of middle management competencies and assessment measures be an effective guide for career development? How would you have used such a list if it had been available?

8.   If MLA supported a repository of structured professional portfolios, would you participate by creating and maintaining a portfolio? In your opinion, what would a portfolio need to include to be useful?

9.   Are you familiar with the NLM/AAHSL Leadership Fellows Program? [If not, explain briefly.] Do you believe a similar program would be useful for developing the next generation of middle managers? Is such a program practical?

The final category of questions relate to the willingness of your organization to support professional development opportunities that might be considered by the MLA and LMS.

Support Issues

1.   If MLA or LMS sponsored a professional development program for middle managers, would you participate?

2.   Would your employer encourage librarians to participate?

3.   Would it consider such participation when making hiring or promotion decisions?

4.   Would it provide financial support for participation? How much ($$)?

5.   Would you and your colleagues be allowed release time to participate? How much?

6.   Which of the following types of program would you recommend for professional development for aspiring management development?
- Individual CE classes
- Certificate program
- Mentoring program
- Professional portfolio
- Leadership institute
- Combination or menu approach

Thank you for participating. I am now going to turn the recorder off and you may make off the record comments about the survey. These comments will not be influence in any way in the recommendation made by the task force, but are simply an opportunity to comment on the process.

Appendix D - New Librarians Focused Interview

Welcome & Ground Rules

Hello, [name]. This is Jane Blumenthal. Thank you for agreeing to be interviewed and for providing input to the Medical Library Association's Task Force on Professional Development for Current and Aspiring Middle Managers (PDCAMM).

As a member of the task force, I am collecting information about the knowledge and experience needed by entry level librarians to successfully move into middle management positions. This information will be used to make recommendations to MLA and its Leadership and Management Section about professional development programs targeted to this segment of the library profession.

Although I am a member of the task force, you should view me as an objective third-party. Neither I nor the task force has a preconceived idea of what the appropriate recommendation will be. Your comments will contribute to our thinking about this issue and will influence our final report. The task force report will include the names of all the interviewees, but will not attribute specific comments, positive or negative, to any individual. I am therefore asking you to be complete, open, and honest about your opinions as you give your answers.

Before we begin, I would like to explain a few things about how the discussion will work.

- The questions I'll ask you today deal with three areas: First, your perceptions of and opinions about the education and experience needed by new middle managers in libraries, second, how entry level librarians can get the appropriate experience, and third, what professional development programs would be useful to early-career librarians who want to move into management positions.

- I will be asking the same questions in all of the interviews. In order to get through all of the questions while being respectful of your time, I have allocated a certain amount of time for each section of questions. I ask that you bear with me if I need to interrupt or redirect the conversation to stay within the time limits.

- I will be recording this interview so that I do not have to take notes as we talk. After our discussion, my assistant will transcribe the recording and I will write a summary report of all the interviews using the transcripts and recordings. All of the recordings will be kept completely confidential and will be discarded after the report is written.

- Because I am recording, it is important that you speak clearly and distinctly. I may occasionally interrupt you to ask that you repeat a remark or clarify what you have said. I need to be sure that all responses are accurately recorded.

Questions

To start our discussion, please tell me a little about yourself and your library.

1.   I'd like to know your current position and how long you have been a librarian.

2.   Are you in a public or private institution? How large is your library?

3.   To whom in your organization do you report?

4.   Did you have a prior career in another field? Did it include management or supervisory experience?

5.   Why are you interested in moving into a management position?

Now let's move into our first section. I will be asking you to consider your preparation to be a middle manager as you answer these questions.

Skills, Education, Practical Experience

1.   Other than an MLS or equivalent degree, in your opinion, what specific education is needed for library management positions?

2.   What background or experience do you think is essential for someone who wants to move into a library management position?

3.   In your opinion, how transferable are management skills between hospital and academic libraries? What are the specific differences and how would you advise a librarian changing institutions to prepare?

Now let's move into our second section. This group of questions focuses on professional development opportunities that might be created for aspiring middle managers. I am asking you to consider your own career and aspirations in answering these questions.

Professional Development

At the Open Forum on Recruitment and Retention during the 2004 MLA annual meeting, several young librarians described their frustration in seeking a management position, saying that most if not all require applicants to have prior management or supervisory experience, putting them in a Catch-22.

1.   In your opinion, is this a valid observation?

2.   Have you personally experienced this frustration in job searches?

3.   Are there types of non-work experience you believe might substitute? How do you believe this could it be documented?

4.   In your opinion, what role does mentoring play in professional and specifically in management development? How formal do you believe the mentoring relationship needs to be? What documentation would be needed?

5.   Do you believe continuing education classes targeted to middle management knowledge and skills would be helpful? Does there need to be a certificate program or competency exam? How would you measure actual learning vs. mere attendance?

6.   In your opinion, would a list of middle management competencies and assessment measures be an effective guide for career development? Would you use such a list if it were available?

7.   If MLA supported a repository of structured professional portfolios, would you participate by creating and maintaining a portfolio? In your opinion, what would a portfolio need to include to be useful?

8.   Are you familiar with the NLM/AAHSL Leadership Fellows Program? [If not, explain briefly.] Do you believe a similar program would be useful for developing the next generation of middle managers? Is such a program practical?

The final category of questions relate to the willingness of your organization to support professional development opportunities that might be considered by the MLA and LMS.

Support Issues

1.   If MLA or LMS sponsored a professional development program for prospective middle managers, would you participate?

2.   Would your employer encourage librarians to participate?

3.   Would it consider such participation when making hiring or promotion decisions?

4.   Would it provide financial support for participation? How much ($$)?

5.   Would you and your colleagues be allowed release time to participate? How much?

6.   Which of the following types of program would you recommend for professional development for aspiring management development?
   - Individual CE classes
   - Certificate program

- Mentoring program
- Professional portfolio
- Leadership institute
- Combination or menu approach

Thank you for participating. I am now going to turn the recorder off and you may make off the record comments about the survey. These comments will not be influence in any way in the recommendation made by the task force, but are simply an opportunity to comment on the process.

Appendix E- Database Survey Results

	Are there professional development opportunities for your section?	Does your section offer CE courses?	How do you provide access to CE courses?	How do you promote CE courses to section members?	Does your section have a CE database?	Are you interest a centralized database for CE courses?
Health Association Libraries Section	Not really	No	MLA website	E-mail sent to listserv	No	Yes!
Public Health/Health Administration Section	Yes. Section purchased the MLA satellite teleconference and made available to section members	Section offers journal clubs, encourages symposium participation	Publicize & survey members	CE chair keeps track of CE courses and notifies members	No	Make current MLA Educational Clearinghouse more robust.
Tech Services Section	Provide information on opportunities offered	No	Quarterly newsletter; e-mail notification	Quarterly newsletter; e-mail notification	No	Seems like a good idea. Would want to poll the members
Hospital Libraries Section	Yes	No	N/A	HSL website	No	Yes
HALs (another response)	MLA annual meeting	No	n/a	Listserv	No	Yes!
Cancer Librarians Section	No	No	No	No	No	Yes, very interested
Collection Development	Not currently	Two members offered a CE course and working to make it web-based	In person; meetings; working toward web-based	Listserv; online newsletter	No	Yes
History of Health Sciences	Encourage participation in committees & to teach CEs	Yes	Annual & chapter mtgs	Annual & chapter mtgs	MLA database	All CE courses have to be in the database
Chiropractic Section	Yes, we sponsor CEs at Annual.	Not recently	N/A	Mailing list; provide stipend for those who teach CEs	No	Yes
Dental Section	Annual meeting only	No	No	Listserv	No	No. No need for a centralized database, just new young

						members
NAHRS Section	Section programming at Annual	At the Annual meeting only	NAHRS website	Listserv	No	Yes
Veterinary Medicine Section	Annual mtg	No	No	Listserv if there is a course	No	No

Categories listed in the MLA Database	Number of Courses Listed
Health Sciences Environment & Information Policies	34
Management of Information Services	66
Health Sciences Information Services Management	150
Health Sciences Resource Management	34
Information Systems & Technology	59
Instructional Support Systems	27
Research, Analysis & Interpretation	22

Appendix F – Annotated Bibliography

General Leadership: **Books**

Bass, Bernard B. Bass & Stogdill's Handbook of Leadership: Theory, Research & Managerial Applications. The Free Press, 1990, (3rd ed)

> *"Bass and Stogdills" is how this classic book is referenced, and in its third edition, it is still encyclopedic in its covering of the history of organizational theories, social psychology and political science . Theories and models of leadership; leadership attributes, leadership and management, and leadership issues for women, minorities, and in different cultures is included. The final section, on leadership developme*nt *is most pertinent to this project.*

Cargill, Jennifer & Webb, Gisela M. Managing Libraries in Transition. Phoenix: Oryx Press, 1988.

> *In a new era for libraries, the authors argue that libraries must have a mission or purpose which justifies their existence. The organizational structure needs to be carefully designed and adjusted to support the mission and minimize constraints. Cargill also believes libraries have become brokers of information, rather than warehouses of materials.*

Kouzes, James M & Posner, Barry Z. The Leadership Challenge. San Francisco, CA: Jossey-Bass, 2002 (3rd ed)

> *Through the five practices of "exemplary leadership", the authors explore case studies and examples that highlight the best practices of successful leaders in a variety of settings. The book demystifies leadership and maintains that it can be learned by anyone. Transformational leadership, focusing on collaboration and commitment is the focus.*

Rost, Joseph C. Leadership for the Twenty-First Century. New York: Praeger Publishers, 1991.

> *An important critique of leadership studies, with a call for a "post-industrial" concept of leadership.*

Seldin, Peter and Mary Lou Higgerson. The Administrative Portfolio: A Practical Guide to Improved Administrative Performance and Personnel Decisions. Anker Publishing, 2002.

Veaner, Allen B. Academic Librarianship in a Transformational Age: Program, Politics, and Personnel. Boston: G.K. Hall & Co. 1990.

> *A highly cited classic in the field of library administration. Historical trends in leadership are reviewed through the literature and focus on future developments is included. Veaner addresses political concerns of the emerging leader and predicts that leadership will be the greatest challenge (not technology or funding) in the library of the future.*

General Leadership Articles:

"Required Reading for Library Administrators, Part Two: An Annotated Bibliography of Highly Cited Library and Information Science Authors and Their Works" Libr Admin Manager 17 (1) Winter 2003. Page #'s?

> *Members of the Cooperative Library Organization Committee (CLOC), a LAMA/LOMS standing committee, have developed this list of the most highly cited works published within library literature. Using citation analysis, they identified the top twenty works. Part One (2002) identified the twenty most highly cited outside the library literature. Works here include both books and journal articles, and contain three medical studies. Matheson, Marshall, and one on UMLS.*

Hernon, Peter B & Powell, Ronald R; and Young, Arthur P. "University Library Directors in the Association of Research Libraries: the Next Generation, Part Two" College & Research Libraries 63(1) January 2002, p 73-90.

> *Description of a study designed to generate a list of attributes useful in designing leadership training programs and institutes; to librarians serving as mentors, and to those aspiring to leadership of large academic libraries. One of the few studies to survey assistant, associate and deputy university directors.*

Jones, Rebecca. "Competencies for Information Professionals of the 21st Century" Information Outlook 7(10) October 2003, p11-20.

> *A revision of the original 1991 SLA competencies, which describes the four major competencies of information professionals: managing information organizations, managing information resources, managing information services, and applying information tools and technologies. Personal competencies are also included. Since there seems to be little agreement among medical library leaders on what constitutes the "core" body of leadership skills, this article seems pertinent.*

Kotter, J.P. "What Leaders Really Do" Harvard Business Review, May-June 1990. p 103-111.

> *Contains the most useful discussion of the distinctions between management and leadership. Kotter believes management's purpose is to deal with complexity; and leadership is about coping with change. Components of management include: planning and budgeting; organizing and staffing; and controlling and problem solving while the equivalent leadership duties are: setting direction, aligning people, and motivating and inspiring people.*

Lynch, Beverly P. "Theory and Practice" Library Administration Management, 18(1) Winter 2004. p30-34.

> *A literature review of the organizational theories that have influenced thinking about library management and leadership. Training and leadership emerged as important elements of the Human Relations period of 1925-1955. Lynch notes that the contingency and situational models, along with team based leadership, are the most common in library leadership training.*

Mason, Florence M & Witherbee, Louella V. "Learning to Lead: An Analysis of Current Training Programs for Library Leadership" Library Trends 53(1) Summer 2004. p187-217.
> *An important article on leadership training programs in libraries, with a complete literature review of leadership theories and training implications. The authors urge more systematic evaluative research, particularly longitudinal studies, be conducted on these programs.*

Matthews, Catherine J. "Becoming a Chief Librarian: An Analysis of Transition Stages in Academic Library Leadership" LibraryTrends 50(4) Spring 2002. p578-602.

> *Using the Nicholson and West model of transition cycles, the author applies it to becoming a chief librarian of an academic library. The four stages are: preparation, encounter, adjustment, and stabilization. These have implications for those designing leadership education and development programs. Contains an evaluation tool for directors to use with staff.*

Weiner, Sharon Gray "Leadership of Academic Libraries: A Literature Review", Education Libraries 26(2) Winter 2003, p5-18.

> *An excellent review of the literature on academic library leadership in the United States, including published research studies, theories and models; literature reviews, books and journal articles published between 1980-2003.*

General Leadership - Websites:

NLM/AAHSL Leadership Fellows Program, http://www.arl.org/olms/fellows/

Middle Management- Books

Cargill, Jennifer & Webb, Gisela. Managing Libraries in Transition. Phoenix: Oryx Press, 1988.

> *Regarding middle management; the authors point out that, traditionally, middle management has been the training ground for future leaders. Because of current organizational trends that favor flatter structures, there are fewer of these positions, and, in fact, middle managers are often predicted to be a "dying breed". Cargill believes the roles of associate and assistant directors are assuming more importance and relevance in libraries because library management is becoming more complex and directors have to spend increasing amounts of time outside the organization.*

Bailey, Martha J. Supervisory and Middle Managers in Libraries. New Jersey: Scarecrow Press, 1981.

> *Bailey believed the role of supervisory and middle managers to be a neglected area of library management literature. Most usefully in this book, she defines middle management as "professionals who supervise other professionals" which generally includes department and division heads. Many library directors regard themselves as middle managers in their parent organization, which leads Bailey to two separate considerations: middle managers in the classification of the parent organization, and inside the library suborganization.*

Moseley, Pixey Anne. Transitioning from Librarian to Middle Manager. Libraries Unlimited, 2004.

> *A blurb on the back of this book best defines it's coverage; Providing insight into the many different areas of expertise that are required in a good manager, Mosley draws upon her experience as a professional library manager to offer sage advice for the aspiring or recently promoted manager. Some of the situations a new manager may encounter that Mosley covers include handling cliques or difficult subordinates, dealing with the perceived or real excellence in the previous manager, establishing and maintaining good relationships with those in positions above or parallel to one's own, budgeting, assessing performance, and many more.*

Veaner, Allen B. The Assistant/Associate Director Position in ARL Libraries. Occasional paper Number 8, July 1984.

> *Based on a survey of 51 libraries, describes the role and function, employment conditions and career patterns of assistant/associate university librarians. Of particular interest to the PDCAMM project, twenty years later, are the survey results and career patterns described. Veaner's survey demonstrated that the*

position directors held immediately before their appointment is the most important predictor of future success. Data showed that librarians serving in AD/AUL positions were twice as likely to rise to a directorship.

Middle Management- Articles

Bailey, Martha J. "Leadership Characteristics of Assistant/Associate Directors" Journal of Library Administration, 17 (3) 1992. 43-55.

> *Bailey examines the position of Assistant Director (AD) in libraries and reviews the studies of leadership both in library and corporate settings. The author defines middle managers as "in the middle, between the staff and the administration". She further lists qualities of successful AD's.*

Bailey, Martha J. "Leadership Qualities of Assistant/Associate Directors". Library Administration and Management, Fall 1992, p193-196.

> *Describes the relationship between director and deputy with a view to melding personalities and for seeking one whose skills complement director's skill and interests. Includes managerial competencies/skills/principles. Of special interest to PDCAMM is: mentoring, formal classes, workshops, or temporary assignments as leadership development tools. Ultimately in deciding when an AD is ready to move up is based on a match between requirements of a particular organization and qualities of a particular individual.*

Kwaskik, Hanna; Fulda, Pauline O; Ische, John P. "Strengthening Professionals: A Chapter-Level Formative Evaluation of the Medical Library Association Mentoring Initiative" JMLA 94(1), January 2006, p19-29.

> *A survey of 184 members of the South Central Chapter of MLA to determine how many used mentors in their careers and to measure the satisfaction with that method of career development. Recommendations were to further improve mentoring at the regional level to include: formal mentoring, web-based mentoring, and a CE course for mentors. Refers in the article to the PDCAMM task force and its 2004 charge as a natural outgrowth of such studies.*

Lynch, Beverly P. "The Role of Middle Managers in Libraries" Advances in Librarianship, Vol 6.,1976. p253-277.

> *The traditional view of the middle manager emphasizes the manager's downward authority over the people who report to him or her. Lynch identifies several important studies on the librarian as professional and examines several models.*

Martin, Elaine R; Brown, Helen-Ann; Epstein, Barbara A; Lipscomb, Carolyn E; Riley, Ruth A; Shipman, Jean P. "Leadership Reconsidered Symposium Report" JMLA 91 (2), April, 2003. p251-7.

> *In 2002, a symposium was conducted at MLA to explore the concepts of leadership in health sciences libraries. The objectives were to: 1) obtain an overview of library leadership issues from national experts in the field; 2) hear the latest research on the attributes that present and future leaders need to possess; 3) learn about existing library leadership development programs; 4) brainstorm in facilitated discussions about leadership challenges facing health sciences libraries and 5) engage in dialog with leaders from MLA, AAHSL, NLM.*

Matarazzo, James M. "Library Human Resources: the Y2K plus 10 Challenge" Journal of Academic Librarianship 26 (4) July, 2000. p223-3.

> *Statistics from the 1990 census show that 83,866 librarians will reach the age of 66 by 2010. A corresponding 1982 study done by King Research showed a drop in total number of graduates of master's degree courses in librarianship.*

Young, Arthur; Hernon, Peter; and Powell, Ronald. "What Will Gen Next Need to Lead?" American Libraries, May, 2004. p33-35.

> *A study of what today's current library directors see as desirable leadership attributes for their successors. The survey, which included assistant and associate directors, also points out that these attributes are relevant to those in leadership positions throughout the library organization, such as members of teams. Three broad groupings were looked at: managerial qualities, personal characteristics, and general areas of knowledge.*

Middle Management- Presentations

De Santis, Melissa and Tania Bardyn at the MLA Annual Meeting in San Diego, May 2003, *Medical Library Middle Managers: Challenges & Opportunities*, www.mlanet.org/am/am2003/e_present/desantis_bardyn.pdf