

## Narrative

The Conference on Academic Library Management (CALM), institutionally and fiscally sponsored by the University of California San Diego (UCSD) Library, requests \$141,088.00 for *Expanding the Impact of the Conference on Academic Library Management: Identifying Gaps and Opportunities in Professional Development Support for Managers*. This two-year planning grant will bring together management researchers, practitioners, and existing formal and informal organizations to examine the state of management training and professional support in the field of academic libraries, and make recommendations for how institutions and professional organizations can provide development resources for managers across the career lifecycle.

**Project Justification**

This proposal aligns with the Laura Bush 21st Century Librarian Program objectives 2.1, “Support the preparation and implementation of large-scale organizational change addressing diversity, equity, and inclusion,” and 2.2, “Create initiatives, activities, and curricula that reduce equity gaps and address issues of diversity, equity, and inclusion in the recruitment, development, and retention of faculty, library, and archives leaders from diverse and underrepresented backgrounds.” Management is a key skill for the success of libraries, organizational change, and development and retention of a diverse workforce. Management plays a significant role in library workers’ everyday experience on the job, and may especially affect workers from minoritized backgrounds. This project aims to create recommendations that develop the skills of current and future managers, with an eye toward equity, diversity, and inclusion, while exploring the qualities that library workers identify as hallmarks of good managers.

Since the 1980s, the academic library literature has bemoaned the lack of management training and recognition of “management” as a separate skillset across the field (e.g., McClure 1980; Wittenbach, Bordeianu & Wycisk, 1992). In a 2010 study, Michael P. Rooney found that more than half of first-time managers in academic libraries had not received any management-related training through their employers, and almost half continued not to receive any management-related training throughout their managerial career. Rooney also found that there were significant differences in access to management training and support at ARL libraries versus non-ARL libraries.

Poor management creates very real problems in academic libraries. A 2009 dissertation by Susan R. Rathbun-Grubb found that a quarter of librarians she surveyed who were leaving their first jobs were doing so because of poor managers. Heady et al. (2020) found in a recent survey of academic librarians that “half of all participants strongly agreed that dissatisfaction with library administration was a key factor in their decision to leave their previous position.” The work of Kaetrena Davis Kendrick (2017) on the low morale of academic librarians found that “all respondents mentioned that absent, ambivalent, laissez-faire, or apathetic leaders significantly contributed to their low-morale experience.” While the problem of management leading to job dissatisfaction and turnover is not unique to academic libraries (see Gallup Inc 2015), there is a growing literature that demonstrates the scope of the impact to our field.

As noted in the 2017 IMLS Positioning Library and Information Science Graduate Programs for 21st Century Practice report, leadership and management skills are both critical for librarianship and under-taught in MLIS programs. Even when programs do offer these courses, it is often the case that students don’t take them, perhaps because they don’t initially intend to become managers, or for lack of flexibility in the courses they choose during a relatively short graduate program. While there are numerous fee-based leadership programs available in the profession (Herold 2015), their reach is limited due to factors such as geography, cost, and release time. There are several examples of multi-day leadership institutes for librarians. In a 2019 study, Hines indicated that most of these courses do not address barriers to leadership, nor critical concerns related to race, gender, and other

identities, although such topics are increasingly listed on the curricula of leadership institutes over the previous three years (Vong 2021).

These institutes meet an essential training need for library leaders, but in the context of management training, share a few key traits that keep them from meeting the training needs of potential managers – focus, cost, and audience. Some examples include:

- The Leadership Institute for Academic Librarians. The focus of this institute is leadership, rather than management, so it emphasizes things like strategic planning/thinking, transformational change, engagement, and organizational theory. The cost is over \$4000 in 2023, not including travel. The training is 5 full days in person in Boston, with substantial pre-work required for participants. The target audience is academic librarians who are already leaders.  
<https://www.gse.harvard.edu/ppe/program/leadership-institute-academic-librarians>
- The ALA Leadership Institute: Leading to the Future. The focus of this institute is leadership, rather than management. It emphasizes leadership, coaching, and community engagement. The program is on hiatus in 2023, and previous cost information is not immediately available, but current membership in ALA is a requirement for participation. The institute is over 4 full days in person in Chicago. The target audience is not limited to academic librarians, but is intended for librarians in high level leadership positions in their libraries. <https://www.ala.org/educationcareers/leadership>
- DeEtta Jones & Associates Library Management Skills Institutes 1 & 2. These sessions are much more focused on day to day management, with learning objectives surrounding cultural competency, self-awareness, decision-making, coaching, and feedback. The cost is just under \$1000 per person in 2023, with some online-only options and some in-person options, and include 9 hours of pre-work, and 9 hours of instructor-led training. The target audience for Institute 1 is new library managers. Institute 2 is targeted toward existing library managers and is more leadership focused.  
<https://www.deettajones.com/library-management-series>
- Regional leadership programs such as the Mountain Plains Library Association Leadership Institute. It is focused on leadership, communication, strategy, collaboration, and change management. The cost is around \$1000 not including travel, and requires membership in a regional organization (multiple years of membership is encouraged), years of experience and leadership potential, and commitment to future service in the organization running it. The institute is 5 days in person in Colorado. The target audience is leadership librarians in the region, and while academic librarians are eligible to apply and attend, the majority of participants in both the organization running it, and in the institute, are public librarians.  
<https://mpla.us/leadership/>
- The ARL Leadership Fellows Program. The program is an intensive, year-long commitment focused on leadership development, public policy, strategic decision making, communication, and change management. The cost is between \$7000-\$9000 and is borne by the institution, and includes 9 monthly online sessions, group projects, and two multi-day trips to host institutions. The target audience is senior leaders at specifically ARL Libraries, with the explicit intent of preparing future ARL Library leaders.  
<https://www.arl.org/category/our-priorities/learning-at-arl/arl-leadership-fellows-program/>

Other similar examples of institutes like these exist, and these are a representative sample of the options available to academic library managers. We want to emphasize that these trainings are extremely valuable for attendees, useful to the profession as a whole, and fill essential needs for professional development for library leaders. Even taken together, they are insufficient for the development needs of the profession. Specifically a training gap remains for ongoing professional development, especially for new and middle managers. All of them present certain challenges that this planning grant proposal is seeking to address:

- Cost: Even the least expensive of these institutes costs \$1000 plus travel costs, and several require annual membership costs for their host organizations. While some institutions might provide funding for managers to attend trainings like these, many organizations would not, and the cost is likely out of the personal budget of many managers in a perennially underpaid profession. Even institutions that do cover training costs for these institutes are unlikely to offer it to everyone on their staff who seeks it.
- Location: Most of these institutes are in-person, for several days. If institutions do not cover travel costs, then travel alone could make many of these inaccessible for managers seeking professional development.
- Focus: With the exception of the Library Management Skills Institute 1, the majority of existing training for library managers is leadership training, rather than management training, focusing on high-level concepts or theory, strategic decision making, and change management, rather than the day-to-day nuts and bolts of management.
- Audience: Most existing professional development opportunities are targeted at librarians who are already in senior leadership roles, which is in keeping with the leadership focus of most of these programs. Few programs offer development opportunities for new managers, or for senior managers with a lot of experience but who have never engaged in fundamental management training. Many leadership programs are targeted toward public librarians, instead of focused on the needs of academic library managers.
- Repeatability: All of the existing development programs we could find are designed for participants to attend once, and carry their new leadership skills into their future roles. None of them are designed to provide ongoing learning opportunities, the way that many conferences do, where the content changes with every program, with the intent of offering new development opportunities every year to the same audience.

It is against this backdrop that the Conference on Academic Library Management (CALM) was created in 2020. What began as a social-media conversation between two Twitter acquaintances turned into a group of over forty volunteers within three months, and delivered its first full-scale virtual conference in March 2021. The conference, whose \$18,000 budget is wholly funded by academic library institutions, “sold out” of our 1,000 free conference seats in a little over a day during the first year, and in under nine hours the second year. The CALM mailing list, which solely serves to share information on the management conference, now has 1,972 subscribers, and CALM has over 1,800 followers on Twitter. In three years of soliciting conference presentation proposals, we have received almost 200 unique proposals each time, with an acceptance rate of approximately 20%. In the 2022 post-conference survey, 98.7% of respondents said they would recommend attending CALM to a colleague, and 96.9% plan to attend CALM again this year. In the free-text responses to the question, “Please share any additional thoughts or comments about CALM 2022,” we received numerous comments wishing for more national, accessible opportunities for conversations and training around library management. A few representative quotes include:

- “This conference is an important resources for academic librarians and I hope to see it continue to grow and shape our field”
- “This was my first library conference that dealt strictly with management techniques and insight from BIPOC managers. We need more of them!”
- “Thank you for focusing on the managers. It is often hard to feel seen/heard for this work that is time consuming, important, and often glossed over.”
- “Overall, I think CALM fills a really important gap in our professional landscape. We don't have enough opportunities to come together around the topic of management and so many of us end up as managers with little formal training. As a field, I think we have a lot of management debt, and as academics, we also struggle with a push toward new managerialism that this conference has helped give me tools to resist.”

- “There is a big chasm between formal ARL-sponsored meetings/trainings on management/leadership, and the 1-2 management themed sessions that seem to be available at function-specific conferences (access, e-resources, assessment, etc.)”

More information about the feedback we have received from attendees is summarized in the CALM 2022 evaluation form, included in the supporting documents.

CALM has created an annual forum for conversations about practical and person-centered management, but there is a clear need for deeper, more sustained, and ongoing professional development around management. CALM’s mission statement states that “we see the practice of management as a set of skills and dispositions developing over time through ongoing education, community sharing, and critical reflection.” This grant represents an opportunity to explore how the field can meaningfully engage in developing management as an ongoing and communal practice.

To this end, CALM seeks funding for a planning grant to precisely define the professional development needs related to management for academic librarians, including aspects such as scalability, accessibility (in terms of cost, geography, and disability), and sustainability. With planning support over two years that will bring together both scholarly experts and practitioners in the field, CALM will produce a white paper that makes recommendations for expanding management education and training in the field of academic libraries.

### **Project Staff**

- Dani Brecher Cook, Associate University Librarian, Learning and User Experience, UC San Diego, PI – Expertise in academic library management, quantitative research methods, person-centered pedagogy, and organizational change
- Kathleen Kim Bell, Head, Assessment and Planning, George Mason University – Co-PI – Expertise in strategy, planning, project management, organization development, building partnerships
- Heather James, Associate Dean, Scholarly Resources, Gonzaga University – Co-PI – Expertise in data management, scholarly communication, quantitative and qualitative research, and academic library management
- Maoria J. Kirker, Teaching and Learning Team Lead, George Mason University – Co-PI – Expertise in qualitative research methods, person-centered management practices, and information literacy instruction
- Jennifer E. Knievel, Department Director, Researcher & Collections Engagement, University of Colorado Boulder Libraries – Co-PI – Expertise in academic library management, professional development for mid-career librarians, mentoring, sexual harassment in libraries
- Shawn(ta) Smith-Cruz, Associate Dean for Teaching, Learning, & Engagement, NYU Libraries – Co-PI – Expertise in critical pedagogy, Queer studies, archives, and DEI initiatives among library faculty
- Diann Smothers, Head, Dacus Library Services & Initiatives, Winthrop University – Co-PI – Expertise in academic library management, organizational change, policy development, and marketing
- Library Professional 4 (to be recruited) – will provide administrative and research support for the project.
- Diversity Consultant (to be identified) – will bring expertise in equity, diversity, and inclusion, as well as facilitation

### **Project Work Plan**

Our objectives for this project include:

- Identify the professional development needs of academic library managers.
- Engage with a wide variety of perspectives on library management with a particular attention to library professionals from historically excluded communities.

- Collaborate with academic librarians and organizations interested in person-centered management principles to map a professional development program for academic library managers.
- Create a sustainable and equitable set of recommendations to facilitate opportunities for professional development in person-centered management practices.

The objectives are broken out into three main phases that are described in detail below. These phases are:

- Phase One: Information Gathering on the State of Academic Library Management
- Phase Two: Management Forum
- Phase Three: Analysis and Synthesis of the Project

Each phase will have distinct tasks/activities that will be led by one or two key project members to ensure the grant remains on track according to the brief timeline provided below and the detailed Schedule of Completion supporting document.

	Aug 2023	Aug 2024	July 2025
Phase One			
Phase Two			
Phase Three			

**Phase One: Information Gathering on the State of Academic Library Management**

During the first year of the grant, the project team will complete four tasks: (1) identify key practitioners, researchers, and professional groups in academic libraries for potential partnership; (2) conduct a review of management professional development in adjacent fields, such as other areas in higher education and museums; (3) review syllabi and course offerings from management courses in library and information science courses; and (4) deploy a survey of the academic library managers about their educational and practical experiences in management. The goal of each of these tasks will be to identify generalizable gaps in education and on-the-job training across the profession. A letter of support from institutions committed to encouraging their staff to participate in the information gathering phase is included in the supporting documents.

*Identifying Partners* (Bell, lead)

We will use time during this initial phase of the grant to build and expand our network of academic library managers and aspiring managers who are interested in advancing the professional development opportunities in the profession. This information gathering will not only inform later aspects of the grant work, such as invitees to the open forum, but it will also help expand the reach of the grant work. Building a community of practice of academic library managers is a key goal of this grant, and this aspect of our work is critical to building that community.

*Reviewing the Literature Outside of LIS* (Library Professional 4 and Smith-Cruz)

Based on the work and scholarship of the grant team, collectively we have a solid foundation for the research and professional development opportunities for academic library managers in the LIS field. We do not necessarily have the scope of the research and scholarship for adjacent fields. During this phase of the grant project, we would expand our research to include similar and complementary disciplines. This includes higher education, nonprofit management, museum studies, and instructional design. The information gathered through this investigation will

inform the survey in this first phase of the grant, the forum proposed in Phase Two of the grant, and the white paper documenting the grant work.

*Syllabus and Course Review* (Kirker, lead)

As part of the information gathering phase, we will conduct a two prong investigation of recent management courses taught in library and information science master's programs. The first part of this task will involve searching library school websites or soliciting library schools directly for recent course offerings and syllabi on management courses. We will analyze the syllabi for skills taught, assignments, and readings, both to identify thematic coverage areas and identify gaps in instruction. The second part of this task will involve engaging library and information school professors or instructors who regularly teach these courses. After appropriate IRB approvals, we will conduct either focus groups or semi-structured individual interviews with this group. This will provide additional qualitative detail on what the syllabi review cannot provide. Additionally, it will help build the community of practice the grant aims to foster. This task is an ideal one for the grant's Library Professional 4 role.

*Survey of Academic Library Managers* (Cook and Smothers, leads)

Informed by the research described above and with the approval of relevant IRBs, the final task of the information gathering phase will be to develop and implement two national surveys for academic library workers. The first survey will focus on academic library managers and aspiring managers. The guiding research questions for this survey include:

- What factors contribute to an academic library worker's decision to become a manager?
- How does library school prepare librarians for the skills required to be an academic library manager?
- How do library managers currently develop management skills outside of formal education?
- What professional development opportunities and skills do academic library workers need to be successful in their jobs?

Library managers impact all workers within a library. The second survey will be open to any academic library worker in an attempt to understand the diverse and varied perspectives of the field. The guiding research questions for this survey are:

- How do academic library managers influence your decision to remain in or leave a position?
- What characteristics embody a good academic library manager?
- What skills would an individual contributor in an academic library need to move into a management role?

We will then synthesize the survey results to help facilitate the in-person forum described in Phase Two of the grant.

**Phase Two: Management Forum** (Full grant team)

Approximately 12 months into the grant, we will convene an in-person forum with approximately 50 participants, including a facilitator and diversity, equity and inclusion (DEI) consultant. The forum will engage participants in a structured design process to develop a preliminary plan for a meaningful and unique national program focused on developing management skills and a management community of practice. Pre-planning for the forum will begin approximately 3-4 months prior and include thoughtful design to ensure accessibility and safety for participants.

*Forum Attendees*

We will invite approximately 20 of the attendees while the remainder of the forum participants will complete a brief application demonstrating their interest and background in the forum topics. We will select all attendees based on their demonstrated commitment to advancing research, scholarship, or practice within the academic

library management space. Of the 20 invited attendees, we envision inviting librarians with a variety of backgrounds. Examples include:

- Library deans and administrators with documented success in academic library management principles, e.g. Kaetrena Davis Kendrick (Winthrop University) and Annie Bélanger (Grand Valley State University)
- A library and information science professor who regularly teaches library management courses
- Library workers focused on labor issues in academic libraries
- Library workers affiliated with the profession's BIPOC-focused communities, e.g. We Here and the Spectrum Scholars Program
- Volunteers from CALM who consistently demonstrated a commitment to building community around the practical skills development of academic library managers
- CALM Steering Committee members, most of whom are also Co-PIs: Kathleen Bell (George Mason University), Dani Brecher Cook (University of California, San Diego), Heather James (Gonzaga University), Maoria Kirker (George Mason University), Jennifer Kniewel (University of Colorado Boulder), Shawn(ta) Smith-Cruz (New York University), and Diann Smothers (Winthrop University)

We will select an additional 30 attendees through an application process. We will invite applications for forum participation through the CALM mailing list, as well as through mailing lists and discussion boards for organizations such as ACRL, Core, and We Here. We will use the application process to further balance the pool of forum attendees, and will include attendees from multiple types of academic libraries such as community colleges, regional comprehensive, research universities as well as public and private institutions. We will also invite attendees who are at different stages of their management careers, including aspiring managers. The application process will also ask about travel support and work release time to ensure equitable support for attendees. Letters of support from potential forum participants are available in the supporting documents. Our diversity consultant will ensure that our application process results in a diverse group of participants in the forum.

#### *In-Person Forum*

A two-day in-person forum will occur in San Diego, California. In consultation with the grant's diversity consultant and with the data gathered from Phase One of the grant, we will draft a collaborative agenda. Prior to the convening of the forum, we will share the preliminary results from our research to inform the conversations in the forum. The primary goal of the forum is to provide opportunity and space for participants to synthesize research results and develop recommendations for what sustainable and accessible professional development opportunities are needed for developing person-centered management skills in academic libraries. We will invite participants to help guide the forum agenda based on emerging needs and interests of the groups. If we conclude the forum with a list of professional development needs and ideas of how to implement those ideas, we will consider this a success as we move to the final phase of the project.

#### **Phase Three: Analysis and Synthesis of the Project** (Full grant team)

The final phase will include analyzing the collected data and feedback through the project, synthesizing the grant work, and disseminating the results to the great library community. During this phase, which will occur September 2024 – July 2025, we will create the following deliverables:

- A white paper synthesizing the work of the grant
- A series of infographics to visual the collected data and its implications
- Informational webinars to share the project results
- A series of presentations at applicable academic library conferences
- A sustainability plan that outlines how the ideas generated throughout the grant can be implemented at a scalable level

These deliverables are explained in greater detail in the “Project Results” section of this proposal.

### **Diversity Plan**

As a person-centered organization that aims toward developing more just and inclusive management practices, CALM has a strong commitment to diversity. Our steering committee (as well as other volunteer groups) intentionally includes library workers with a variety of intersectional identities, including racial/ethnic backgrounds, abilities, gender identities, sexual orientations, age, body size, religion (or lack thereof), geographic locations, educational attainment, and caregiver status. All aspects of our grant work will continue to center diversity, equity, and inclusion, including recruiting focus group and forum participants from underrepresented groups within academic libraries; making recommendations that will expand the accessibility of ongoing management training to library workers with a variety of resourcing; and identifying management training that supports a diverse workforce.

Additionally, the grant will fund the hiring of a diversity consultant who will work with the project team throughout the grant period. During the first year, the diversity consultant will help us to design our survey instrument, focus group protocols, and calls for participation. Specifically, we will consult on accessibility, inclusive language, and culturally inclusive practices. In the second year, the consultant will help us to plan the forum and serve as the key facilitator for the forum.

For any synchronous work, such as focus groups and the forum, we will solicit any accommodation needs from our participants, and provide live-captioning through Zoom as a default setting. We will ensure that products developed for the web exceed WCAG 2.1 guidelines, including providing non-text alternatives, using high-contrast presentation options, and keyboard operability. We will also consider physical spaces that support accessibility and safety for all participants, especially with the ongoing impact of the pandemic.

All virtual and in-person work will conform to CALM’s existing [code of conduct](#) policy, which was developed with a broad range of volunteers and is reviewed annually.

Examples of expected behavior that contributes to a positive environment includes:

- Using welcoming and inclusive language
- Being respectful of differing viewpoints and lived experiences
- Accepting constructive criticism gracefully and owning the impact of our words and actions
- Showing empathy towards other participants
- Showing consideration and respect in both speech and action
- Showing respect for individuals’ personal boundaries
- Respecting the pronouns indicated by attendees and not assuming pronouns
- Leaving room for each other in the conversation

Unacceptable behavior includes, but is not limited to:

- Harassment of any kind, even in a joking or ironic manner
- Deliberate intimidation, stalking, social media harassment, or non-consensual photography or recording
- Trolling, insulting or derogatory comments, personal or political attacks, or sustained disruption of talks or other events
- Other conduct which could reasonably be considered inappropriate in a workplace setting



These practices will help to ensure that spaces associated with the grant are welcoming and safe for all library workers.

### **Project Results**

We envision at least four products as a result of this grant: (1) a white paper synthesizing the findings of the project; (2) infographics visualizing the findings of the project; (3) a suite of webinars and workshops for the greater library community; and (4) a sustainability and implementation plan to carry the work of the grant forward.

#### *White Paper* (Full grant team)

This planning grant will culminate in the completion of a white paper outlining the findings of the grant work. This will include an overview of the current state of management training in academic libraries; identification of themes and gaps in managerial training for academic librarians; and recommendations for the field. We will accomplish this through synthesizing a variety of components outlined in this grant application: A researched literature review, an analysis of the survey results from academic library managers and aspiring managers, an evaluation of syllabi from library school management courses, and feedback and information gathered from the in-person management forum.

#### *Infographics* (James and Knievel, leads)

While the white paper will provide a rich and detailed synthesis of the grant project, we will also create a set of easily digestible infographics to visualize the grant work. Using survey results and feedback from the in-person forum, these infographics will show the issues in academic library management training and present workflows and recommendations to move the field forward.

#### *Presentations* (James and Knievel, leads)

Using the CALM platform, we plan to present the findings of this grant in a variety of different venues, including through a CALM sponsored webinar or event. A webinar serves as a way to disseminate our work in the white paper and infographics to a live audience. This format also allows us to record a presentation that can be viewed as time allows and to preserve the recording for later reference for the field.

We also envision submitting proposals to various library conferences and events to broaden the reach of our work. This extends beyond the network of librarians associated with CALM and will allow the results of this grant project to reach a wider audience. Conferences and organizations that might benefit from hearing about this project include the Association of College & Research Libraries (ACRL); Core: Leadership, Infrastructure, Futures (a division of the American Library Association); We Here; the Association of Research Libraries; the Library Assessment Conference; and the Joint Conference of Librarians of Color (JCLC).

#### *Sustainability Plan* (Full grant team)

Using the products described above, we will also create a sustainability and implementation plan. This plan will use the grant work and findings in the white paper to identify gaps in management training and create a multi-faceted, collaborative, and national approach to building a community for academic library management professional development.

While the specific details of such a plan are dependent on the findings of the grant, we envision a few possible outcomes:

- Cohort Program – Inspired by the ACRL Immersion Program, a cohort program will focus on developing practical academic library management skills over the course of a year. Occurring remotely through the use of applicable digital platforms, a cohort group will build community and grow together through set webinars, reading groups, and other professional development activities. This would include facilitating guest speakers for the group and culminate in a final managerial deliverable relevant to the individual participant. Examples include a 5-year managerial plan, a mentoring plan, or a professional development program they can deliver locally at their institution or may be generalized for the greater library profession.
- Mentoring Program – A mentoring program would aim to match experienced academic library managers with new managers. There are other potential mentorship managing opportunities to explore, such as an aspiring administrator with an experienced library dean.
- Webinar and Workshop Series – Based on the topics and themes identified from the grant work, a monthly webinar and workshop series open to the wider library community could be offered. These events could focus on both foundational skills through the webinar series and developing deliverables for individual managers to deploy locally through the workshop series.
- Publication Opportunities – A potential outcome of the grant work may reveal a gap in publishing opportunities for academic library managers. One outcome could be the creation of a publication venue. Examples include a blog with invited content, a newsletter, or an open access scholarly journal. CALM currently uses Open Science Framework (OSF) Meetings as a conference repository. The grant may indicate enhancing this repository or developing a new platform.

Based on the analysis of the grant project results, we also intend to apply for an IMLS implementation grant.



August 2024 – July 2025												
	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Forum Planning	Light Blue	Light Blue										
Forum Convening	Dark Blue	Dark Blue										
Forum Post-Survey		Light Blue	Light Blue	Light Blue								
Forum Analysis		Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue					
White Paper Development				Light Blue	Light Blue	Light Blue	Light Blue	Light Blue				
Development of Infographics						Dark Blue	Dark Blue	Dark Blue				
Publication of Results								Light Blue	Light Blue	Light Blue	Light Blue	
Webinar/Event with Grant Wrap-up									Dark Blue	Dark Blue	Dark Blue	Dark Blue
Informal Community Engagement			Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue	Light Blue
Conference Submissions and Presentations					Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	
Development of Final Grant Report										Light Blue	Light Blue	Light Blue

## Digital Products Plan

### **Type**

This project will produce a white paper, an infographic, two surveys, and at least one conference presentation that will be recorded. File formats will include downloadable PDF, MP4, and CSV files. The white paper will provide an overview of the results from the grant work and detailed analyses and findings from the surveys and forum. The project will also produce an infographic that shows a visual summary of results presented in the white paper. Survey results will be presented in CSV format with identifying details redacted, with an analysis of the data attached in PDF format. The findings will be presented at the Conference for Academic Library Management (CALM), and the presentation will be recorded. Proposals to present at other national conferences may result in additional presentations.

### **Availability**

The white paper, infographic, and survey datasets and documentation will be shared through the Open Science Framework (OSF) platform for viewing and downloading, allowing for free and open access with no single institutional affiliation. The recording of the CALM presentation will be viewable through the OSF platform and on the CALM YouTube channel. All digital products will be available through the OSF platform. Additionally, all products will be linked through the CALM website for an additional pathway to discoverability.

### **Access**

The investigators will seek approval from the UC San Diego Institutional Review Board (IRB) to ensure that research protocols protect the privacy of participants and the protection of collected data. Raw survey results data and interview recordings will not be shared for privacy and protection of research subjects, and only available directly from research personnel upon vetted request. Additionally, interview recordings will be shared only with written permission from the interviewee. Investigators will also prepare optional release forms for any photos, video, or audio gathered from the focus groups and interviews before sharing these types of materials. We will work with our DEI consultant to ensure that cultural concerns are appropriately addressed. Survey results will have identifying information removed before being published.

All digital products will be released under the Creative Commons CC-BY-NC license, allowing others to share and adapt the findings for non-commercial use only, with attribution.

### **Sustainability**

Digital products will be made available through OSF, an online platform maintained and developed by the Center for Open Science. Hosting through OSF ensures long-term open access and discoverability of all digital products. This non-profit organization has a preservation fund that will allow read access for 50 or more years at current hosting costs.

For the purpose of backup and preservation, data project folders will also be deposited in the data repository of the University of California (institutional Dryad) as the primary supporting institution.

## Organizational Profile

The University of California, San Diego (UC San Diego) was established as a public land-grant institution in 1960, as the seventh campus in the University of California system. [The University's mission](#) focuses on “transforming California and a diverse global society by educating, by generating and disseminating knowledge and creative works, and by engaging in public service.” The campus now serves over 40,000 students and was recently recognized as an Asian American and Native American Pacific Islander-Serving Institution. 22% of UC San Diego students identify as Latinx, and is identified as an emerging Hispanic Serving Institution.

UC San Diego Library was established in 1970, and reports to UC San Diego leadership through the Executive Vice Chancellor for Academic Affairs. As part of the [2022 strategic planning process](#), the UC San Diego Library adopted a new mission statement: “The UC San Diego Library stewards knowledge and empowers users to analyze and interpret information in order to advance transformational research, teaching, learning, and creative endeavors.” Also as part of the strategic planning process, the Library adopted a [strategic pillar of “responsible stewardship.”](#) which includes “employing a person-centered approach to leadership and management.” This is in alignment with UC San Diego’s campuswide “[People Proposition](#),” which centers person-centered management practices such as authentic engagement, diversity, and clear campus and work direction.

UC San Diego Library serves as the administrative home for the [Conference on Academic Library Management](#) (CALM), a grassroots effort of like-minded academic library professionals that provides a national forum for discussions around person-centered management practices. Founded in 2020, CALM is a fully volunteer organization, whose conference activities are fully funded by the sponsorships of academic library institutions. The direction of CALM is set by the Steering Committee, a core group of eight volunteers from diverse backgrounds and institutions, and supported by a rotating group of volunteers from an intentionally diverse set of volunteers and backgrounds. Over 40 institutions are represented in this year’s group of CALM volunteers. CALM’s mission is “...to fill a gap in the academic library professional development landscape by focusing on practical management skills and concrete practices.”

Over the past three years, CALM has hosted two fully virtual conferences, and will produce a third in June 2023. The CALM mailing list has almost 1800 subscribers from community colleges, liberal arts colleges, public universities, private universities, and professional associations. The 2022 conference “sold out” of free tickets in 8 hours, and there was international representation from New Zealand, Canada, the UK, and the UAE. There is a large and growing number of library workers interested in developing and improving management skills.

Members of the CALM Steering Committee will lead the work of the grant to explore the broader needs for management professional development. This group includes the co-founders of CALM, members who have been with CALM since 2020, and highly engaged volunteers who joined the group in 2021 and 2022. The Steering Committee includes members with a wide variety of intersectional identities.