

Proposal to Re-Schedule HLI from November to June

February 21, 2019

Prepared by John Garrison Marks

Executive Summary

In late 2018, AASLH learned that planned renovations to the Indianapolis Residence Inn—where the History Leadership Institute/SHA has housed participants in shared, 1-bedroom suites since 2004—might dramatically increase our lodging costs or force other changes to the lodging arrangements for the program. We found few viable alternatives among area hotels. The best alternative was the 2-bedroom, 2-bathroom graduate apartments at nearby Indiana University-Purdue University Indianapolis (IUPUI). These apartments would enhance the lodging arrangement by offering more space and privacy, but would require moving HLI to the summer.

After discussing the issue with the HLI advisory committee and executive committee of AASLH Council, major questions were raised about the viability of a June program. Both groups expressed concern that a summer program might be less accessible for professionals from small institutions. At the suggestion of the advisory committee, we developed a quasi-experimental survey to gather more data to inform our decision. The survey presented respondents with descriptions of three program scenarios in random order: the program as currently offered; a November program with higher lodging costs; and a June program. It also asked respondents to rate the importance of several factors when considering applying to a residential professional development program. We distributed the survey to a stratified (based on budget size), random sample of staff members at AASLH member institutions. In our sample group, 53 percent of respondents represented institutions with budgets of \$250,000 or less; 69 percent represented institutions with budgets of \$1M or less. At the time of this report, 152 people responded to the survey; their distribution at various institutional budget levels matched the sample population very closely. This sample size allows us to say with 80 percent confidence and a margin of error of 5 percent that the results are representative of our institutional staff database of approximately 3,100 individuals.

The survey results indicate that across all budget levels, including institutions with budgets of \$250,000 or less, history professionals are more likely to apply to the June program than to either of the November options. They indicated that, in addition to overall quality and relevance of sessions, that cost and length of program are the two most important factors when considering applying to a professional development opportunity of this kind. While more than 80 percent of respondents said cost and length were either “Important” or “Very important,” only 52 percent of respondents rated “Time of year offered” as such.

These results lead AASLH to offer several recommendations regarding HLI. First, **we recommend that the HLI seminar currently scheduled for November 2019 be rescheduled for June 2020 and held in June each year thereafter.** Working with the HLI advisory committee and Council, we will use the intervening period to continue to investigate further changes to enhance the program, including building greater racial and ethnic diversity within each cohort and the expert facilitators, and evaluating the possibility of a shorter residential option, supplemented by distance learning. Finally, **AASLH will use these survey results as part of our IMLS-funded continuing education framework development, investigating other ways we can make our offerings more accessible to small institutions.**

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Background

Since the History Leadership Institute (formerly the Seminar for Historical Administration) moved to Indianapolis in 2004, HLI has housed its program participants (now referred to as “associates”) two each in 1-bedroom, 1-bathroom suites at the Residence Inn Indianapolis Downtown on the Canal, located directly across the street from the Indiana Historical Society (IHS). In these suites, one associate sleeps in the bedroom while the other uses a sofa bed in the shared living room; the two share a bathroom accessible only through the bedroom. Most recently, these shared rooms cost approximately \$1,600 per person for the three-week program.

In late 2018, AASLH learned of planned renovations at the hotel. While the full impact of the renovations remains unclear due to poor communication from the hotel, we used this opportunity to begin investigating what other lodging options might be available and if they presented an opportunity to enhance the program. Ultimately, we learned that few, if any, hotels within reasonable walking distance of IHS could provide enough suites to match the current arrangement at the Residence Inn. Offering each associate their own suite at the Residence Inn, which renovations may make necessary, could double the cost of housing for each person.

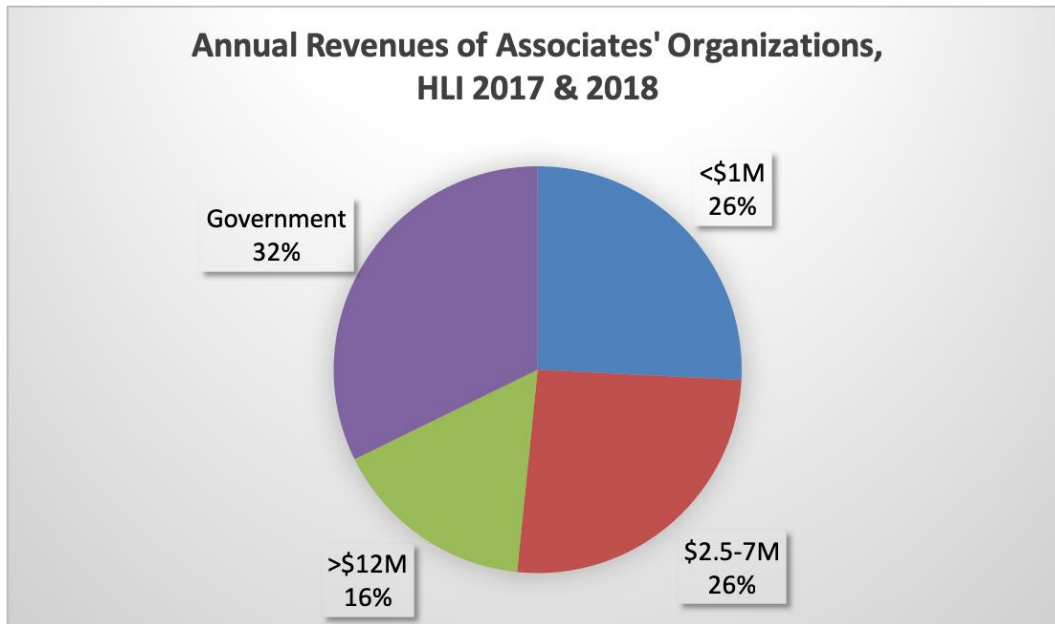
Other options, like short-term business apartment rentals, proved untenable for one reason or another. The most promising alternative to the Residence Inn was the use of graduate apartments at Indiana University-Purdue University Indianapolis (IUPUI). These 2-bedroom, 2-bathroom apartments with a shared kitchen and living space would provide a lodging arrangement more appropriate for the mid-career applicants we hope the program will attract, offering more privacy for about \$300 less per person. Unfortunately, these apartments would only be available if the program was offered in the summer.

As we began considering changes, we first gathered information to gain a stronger understanding of how the program as it stands now—offered in November, for 3 weeks, at cost of \$3,200—compares to other mid-career museum and history professional development programs. We found that HLI is one of the only such programs offered over the winter months (and the only one offered between August and December) and is one of the longest programs of any in the field.

Program	January	February	March	April	May	June	July	August	September	October	November	December	Fee*
History Leadership Institute													\$ 3,200
Getty Leadership Institute													\$ 8,000
GLI Next Gen													\$ 3,500
Jekyll Island Management Institute													\$ 750
Center for Curatorial Leadership													\$ 2,500
VSA Newport Summer School													\$ 2,700
Attingham Summer School													\$ 5,830

Legend one week residential online * Fees may include tuition, lodging, meals, transportation and vary significantly.

We also sought to better understand how the program as currently offered reaches professionals from small institutions. Using the Form 990 from private non-profits represented in the past two classes, we found that 26 percent of participants represent institutions with budgets smaller than \$1M. The program also had no participants representing institutions with budgets between \$7M and \$12M or between \$1M and \$2.5M.



As we considered the feasibility and impact of potential changes to housing arrangements, cost, and scheduling, and after conversations about the program with the HLI advisory committee and the executive committee of AASLH council, we sought additional data to guide our decision making. To that end, we used a survey to gather the opinions of history professionals about residential professional development opportunities.

Questions

The primary question we sought to answer was: how will potential changes to the program affect participation, particularly from small institutions? The HLI advisory committee in particular expressed concern that shifting the program to the summer might have a detrimental impact on the ability of history professionals at small institutions to apply.

Methodology

In order to answer this question, we developed a quasi-experimental survey that would offer us the ability to understand how respondents viewed different program scenarios and what factors they felt were most important when they thought about applying to a program like HLI.

Using staff profiles of AASLH institutional members, we distributed the survey to a stratified, random sample of approximately 750 history professionals. From our database of about 3,000 staff profiles that we could connect to an institutional budget level, we determined how many individuals at each level should receive the survey. We distributed the survey as follows:

Budget Level	# of Recipients	Percent
Partner Inst.	164	19%
INST >10M	5	1%
INST 5M-10M	0	0%
INST 2.5M-5M	30	4%
INST 1M-2.5M	45	7%

INST 500k-1M	70	7%
INST 250k-500k	70	9%
INST 50k-250k	328	42%
INST <50k	45	11%

The survey was distributed to 373 individuals working at institutions with budgets of \$250,000 or less, about half of the total sample. While this proportion was generated through an analysis of institutional staff profiles, AASLH estimates that about half of the history organizations in the United States have budgets of \$250,000 or less. While 26 percent of HLI participants in 2017 and 2018 represented institutions with budgets smaller than \$1M, such individuals represented 76 percent of our sample audience, a number AASLH believes much more accurately represents the field.

Respondents were contacted and asked to provide their response to a professional development survey. The survey instrument did not mention the History Leadership Institute by name. Upon opening the survey, respondents were presented, at random, with three different program scenarios. Each scenario began:

“[This Program] is a professional development seminar in which mid-career professionals at history organizations work with experts from around the country to consider and discuss the biggest challenges facing the field.”

Each scenario then provided details, in bullet points, as follows:

“Program Sigma”

- *The program is 3 weeks long and is offered in November.*
- *Participants are required to be in residence on site for the entire duration.*
- *Participants are housed two each in a 1-bedroom, 1-bathroom suite with a shared bathroom (accessible through bedroom), living room and kitchenette.*
- *One participant sleeps in a closed bedroom and the other on a sofa-bed in the shared living room.*
- *The residence is across the street from the professional development site.*
- *The program costs \$3,200.*

“Program Delta”

- *The program is 3 weeks long and is offered in November.*
- *Participants are required to be in residence on site for the entire duration.*
- *Each participant is housed in a 1-bedroom, 1-bathroom suite with a living room and kitchenette.*
- *The residence is across the street from the professional development site.*
- *The program costs \$4,800.*

“Program Gamma”

- *The program is 3 weeks long and is offered in June.*
- *Participants are required to be in residence on site for the entire duration.*
- *Participants are housed two each in a 2-bedroom, 2-bathroom apartment with a shared living room and kitchen.*

- The residence is approximately 1 mile from the professional development site.
- The program costs \$3,200.

Finally, all respondents were asked “How important are the following factors in your decision to apply to a residential professional development seminar?” They were asked to select from ‘Not Important,’ ‘Slightly Important,’ ‘Important,’ and ‘Very Important’ for the following factors:

- Cost of program
- Time of year
- Length of program
- Quality of lodging arrangements
- Distance between lodging and classroom
- Relevance of sessions
- Size of cohort
- Diversity of expert facilitators
- Location of program
- Overall quality of program

Results

At the time of this report, we received 152 responses to the survey. This response rate provides 80 percent confidence and a 5 percent margin of error that the responses are representative of the more than 3,000 institutional staff members in the AASLH member database that can be connected with an institutional budget. The representation of each budget level among the 152 respondents aligned very well with the proportions in the sample.

Budget Level	Responses	Sample	Difference
Partner Inst.	22%	19%	2%
INST >10M	1%	1%	0%
INST 5M-10M	0%	0%	0%
INST 2.5M-5M	4%	4%	0%
INST 1M-2.5M	6%	7%	-1%
INST 500k-1M	9%	7%	3%
INST 250k-500k	9%	9%	0%
INST 50k-250k	43%	42%	1%
INST <50k	6%	11%	-5%

Among these responses some clear trends emerged.

- The description of the program as it is currently offered (referred to in the survey as “Program Sigma” emerged as the *least popular* of the three possibilities. The description of the June program with a shared 2-bedroom suite was the *most popular*.

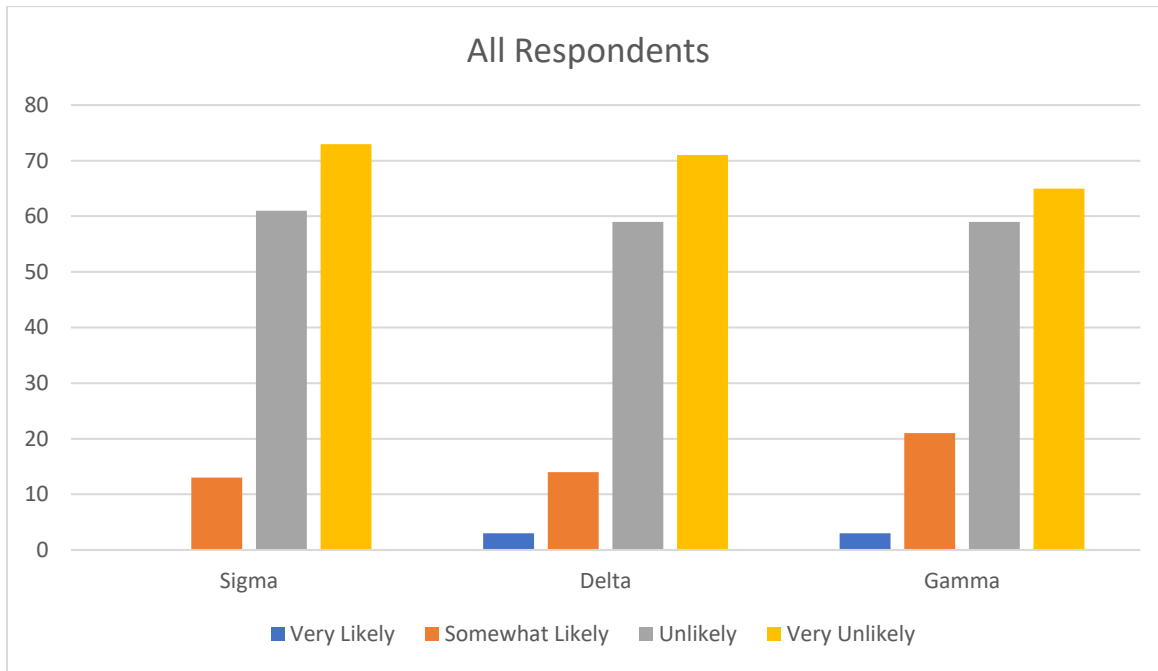
- Respondents indicated that, in addition to overall quality and relevance of sessions, that *cost* and *length of program* were the most important factors when considering applying.

Comparison of Three Programs

- Program Sigma: describes HLI as currently offered, with a shared 1-bedroom suite, in November, \$3,200
- Program Delta: describes November program with a private 1-bedroom suite, for \$4,800
- Program Gamma: describes June program with a shared 2-bedroom suite, for \$3,200

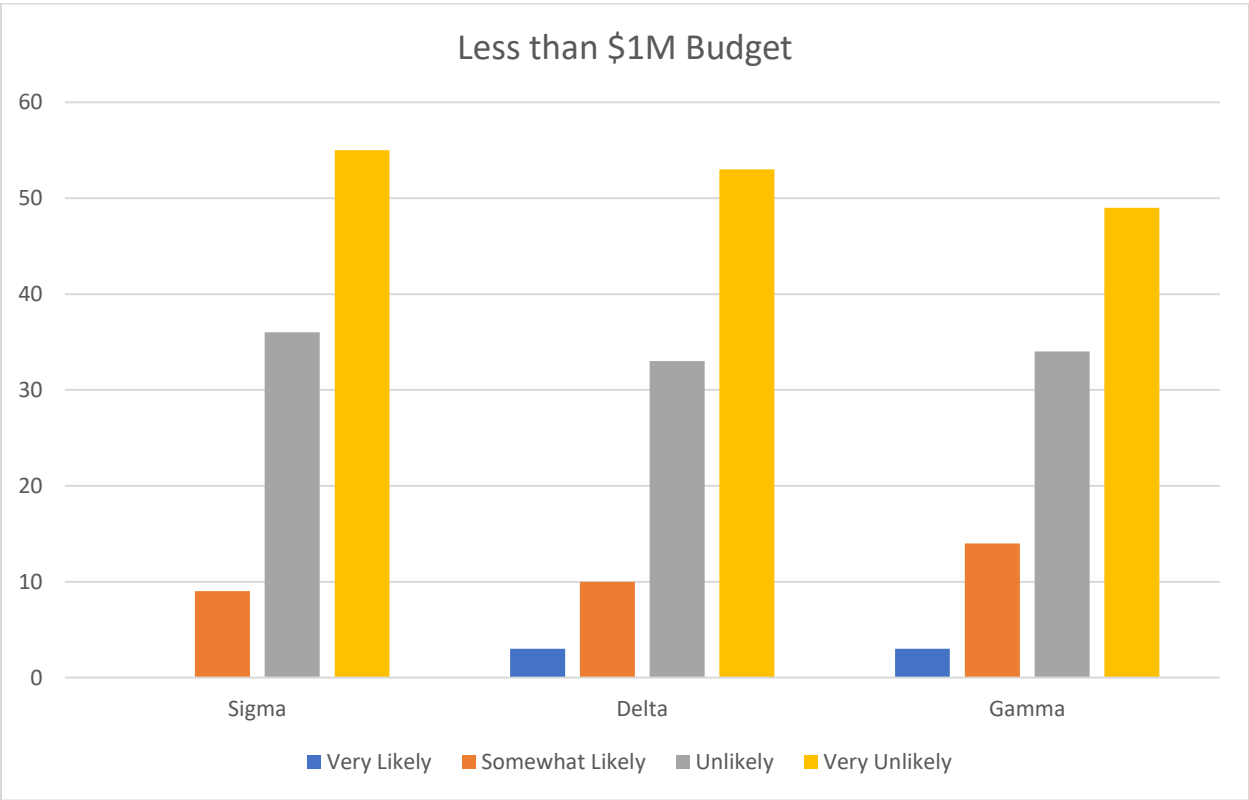
Among all respondents, 16 percent were “Somewhat Likely” or “Very Likely” to apply to Program Gamma, while only 11 percent were “Somewhat Likely” or “Very Likely” to apply to Program Delta and 9 percent (with 0 indicating they were “Very Likely” to apply to Program Sigma).

All Respondents						
	Sigma		Delta		Gamma	
Very Likely	0	0%	3	2%	3	2%
Somewhat Likely	13	9%	14	9%	21	14%
Unlikely	61	40%	59	39%	59	39%
Very Unlikely	73	48%	71	47%	65	43%



This trend held when only respondents representing institutions with budgets smaller than \$1M were analyzed.

Less Than \$1M						
	Sigma		Delta		Gamma	
Very Likely	0	0%	3	2%	3	2%
Somewhat Likely	9	6%	10	7%	14	9%
Unlikely	36	24%	33	22%	34	22%
Very Unlikely	55	36%	53	35%	49	32%



This trend remained true for any individual budget level as well, including the \$50k to \$250k budget level, which had the most respondents. **Across the sample, more respondents indicated they were “Somewhat Likely” or “Very Likely” to apply to the June program than to the two November programs as described.**

Furthermore, the survey’s experimental design also allows us analyze if respondents are more likely, less likely, or equally likely to apply to one of the two new possibilities than they are to the program as currently offered. As explained in the background section, the program is likely to have to change due to hotel renovations; the question we are seeking to answer is what that change might look like.

Program Delta

When comparing Program Delta (November, private suite, \$4,800) with the current program offering, the results are largely neutral. Although 15 percent of respondents indicated they were *more likely* to apply to Program Delta than to Program Sigma, nearly as many (13 percent) indicated they were *less likely* to apply to this program, almost surely due to the 50 percent cost increase.

Program Delta		
More Likely	23	15%
Same	110	72%
Less Likely	19	13%

Meanwhile, the results for Program Gamma (June, 2-bedroom suite, \$3,200) were more favorable. For that program, 16 percent indicated they were *more likely* to apply when compared with Program Sigma, but in this case only 4 percent indicated they were *less likely*.

Program Gamma		
More Likely	25	16%
Same	121	80%
Less Likely	6	4%

Given the need for some kind of change to the program, these results indicate that offering the program in June instead of November and keeping the cost the same is preferable to a change that keeps the program in November but increases the program cost.

Comparison of Factors Influencing Applications

The survey also asked respondents to indicate how important various factors were in their decision to apply to a residential professional development program; they indicated whether each factor was “Not important,” “Slightly important,” “Important,” or “Very Important.” Respondents clearly indicated they considered four of these factors more important than all the others, as indicated in the table below:

Important or Very Important		
Factor	Count	%
Overall quality of program	135	89%
Relevance of sessions	134	88%
Cost of program	124	82%
Length of program	122	80%
Diversity of expert facilitators	104	68%
Location of program	97	64%
Time of year offered	79	52%
Quality of lodging arrangements	61	40%
Size of cohort	54	36%
Distance between lodging and classroom	36	24%

This table reveals that 80 percent or more of respondents rated “Overall quality of program,” “Relevance of sessions,” “Cost of program,” and “Length of program” as either “Important” or “Very Important.” Because quality and relevance are not variables being considered for change (we are of course always striving to maintain high standards in those areas), it is cost and program length that are the most

important factors. These results suggest our efforts are best focused on ways to keep program costs down and on exploring the possibility of a shorter residential component.

It is notable that only 52 percent of respondents identified “Time of year offered” as being “Important” or “Very Important.” Coupled with the responses to the scenarios outlined above, this would indicate that providing a higher quality program at any time of the year is preferable to applicants over making sacrifices to keep the program in a certain season or month.

Conclusion

There are many other ways to analyze this data, and the survey will provide us significant insight into ways we can best improve the program. This initial, high-level analysis, however, offers clear answers to the questions that prompted the survey.

First, it reveals that changes to the program will not necessarily disproportionately affect small institutions. All respondents, including those from small institutions, indicated they are more likely to apply to a June program offered at the current tuition and lodging cost than they are to the program as currently offered or to a more expensive November program with a private suite.

Second, the data reveal that, among all the factors that influence one’s decision to apply or not, the cost and length of the program are far more important considerations than the time of year in which the program is offered.

Third, it suggests that the appeal of the History Leadership Institute might be limited to a certain kind of applicant. The program offers an unparalleled opportunity to deeply engage with critical issues facing history organizations in a challenging and dynamic environment, but only a small subset of history professionals are either willing or able to make a three-week, \$3,200 commitment to that kind of program.

Recommendation

Based on the results of this survey and the analysis provided above, AASLH makes the following recommendations:

- That the History Leadership Institute scheduled for November 2019 be postponed.
- That the History Leadership Institute be re-scheduled for June 2020 and held annually every June thereafter.
- That AASLH, along with the HLI director and advisory committee, continue exploring the feasibility of a shorter residential component to the program and the addition of an online or distance learning component.
- That AASLH, as part of its ongoing continuing education framework development, redouble its efforts to reach small institutions in ways other than the History Leadership Institute.