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## Strategic Human Resource Planning for Academic Libraries

Information, Technology, and Organization

Michael A. Crumpton





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### About the author

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### Introduction

Writing this book reminded me of the "barrel of fun" part of a fun house at a fair or circus. The idea is to past through to the next section of the attraction while the barrel is moving or spinning, without falling down. The environment within academic libraries is undergoing this same feature, of being in constant motion while the goal is to progress forward. Managing libraries and the people employed in these organizations can be hard to do without falling down. This is where managing the human resource functions strategically, can help your progression through various obstacles that might present themselves to your organization. But the goal is to get to the next part of the fun house; so strategically planning your steps, so as to not fall down, becomes critical to get through the barrel.

Likewise, my esteemed colleagues and peers who are cited in this volume have all undergone similar trials and upheavals in determining their course of actions with regards to the human resource functions of their organizations, as well as operating in a dynamic and changing environment. This should be considered in reviewing these resources, assessments, studies and viewpoints, as everyone has unique circumstances and customized needs for their organization.

Academic libraries have always been institutions of change and the onset of the Internet and World Wide Web over 25 years ago, created the opportunity for change to occur quicker and with increasing complexity. This has provided the opportunity for staffing to be modified from traditional activities and functions into web-based or supported activities moving traditional functions into an electronic mode of resources and services.

This monograph represents a unique point of view for managing the human resources functions in academic libraries, given the constant changes that are occurring and the enhanced need to provide value and relevance to the also changing needs of institutions of higher education. Academic libraries have increasing become complex and dynamic organizations that need strategic thinking and more complex processes in order to compete in an environment challenged by technology and independent users. Chapter 1 discusses this environment and why an organization should grow its strategic acumen especially with regard to its human resource element, one of the most critical of functions for the organization.

Academic libraries, because of their relationship with a centralized larger institution, can very well overlook the importance of developing their own strategic plans and initiatives for developing personnel and the human role of total operations and relevance to its mission and value added to institutional goals and objectives. Understanding how the human resource components of the organization adds to the dynamics of the library as a whole can offer a higher level of intelligent decision making for the road ahead.

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Chapter 2 offers some basic process planning considerations in how the human resource functions can be integrated with other strategic objectives for overall total organization benefit. These processes are probably performed in conjunction with the university's or college's central human resource functionality, but academic library leaders need to be the driving force over much of the process for the benefit of the library as an organization.

This focus is continued in Chapter 3, to address how human resource ideals and principles should be seen as a partner in strategic planning and why it is important to follow a separate clear strategy as it relates to managing the human element. Librarianship as a profession is moving into new challenges and maintaining the status quo is no longer the norm. The new normal for librarians will require a modern, strategic element of purpose for keeping the profession active, and relevant in an "on-line" global society.

Chapter 4 addresses how academic libraries are organized and how the profession is changing. The changes work their way into the individual roles and responsibilities of all library staff, in particular librarians, most of whom have had a traditional library and information science education. As the world has changed, so has the fundamental expectation of users as information seekers. The roles of libraries and those who work in the profession must also change in order to meet changing user needs and their expectations of professional assistance as information seekers.

These emerging trends are also discussed in Chapter 5 in terms of other peripheral issues that have an impact on services, resources, and accountability functions, in academic libraries. As traditional educational curriculum becomes outdated, librarians must look at how this impacts their skills and what measures of development must to taken to ensure individuals are keeping up with the whole, or the organization and profession. Individual competencies impact the organization's total capacity for effectiveness, so insuring the parts develop into the proper "whole" is important.

Rightfully so, library and information science education is changing and adapting to professional trends and needs. Chapter 6 looks at trends and a change to the profession's educational beginning as it impacts the future skills of the profession.

Finally, Chapter 7 discusses how it will take strong leadership within the academic library itself, to influence not only individual institutions but also the profession itself in adapting to a new world of information and new way of providing access and context to scholarly work and big data. Academic library leaders must not only embrace change but also learn to plan strategically for the knowledge, skills, and abilities of library staff, that the organization will need to survive and prosper.

Libraries are a people driven organization and like any other organization, the people working for and supporting the mission of library are paramount to its success. A healthy organization requires strategic thought to be both effective in its mission but also significant to individual needs. I hope this book provides the background and incentive to have both within your organization.

The references listed at the end are also wonderful resources for additional reading, and can provide additional detail and perspective to your actions going forward.

## Strategic intelligence in today's environment

### 1.1 Introduction

The global economic crisis of the last several years has had a profound impact on organizations across a wide scale of purpose and type. Overall, the libraries and information centers have been impacted, not only financially but also with enhancement and change of technologies affecting the output of services and material format and accessibility. Private companies and firms seek to find strategies in which financial shortfalls can be offset in order to remain profitable and sustainable. Public institutions, such as state supported facilities of higher education, which depend on public revenue for support, not only have to adjust for sustainability but also have a stake in the impact to its organizational values and mission for its constituency.

All of these organizations must develop a strategy which will institute needed organizational changes to provide a path for sustainability as well as create values to its stakeholders. Institutions of higher education in particular must balance a very diverse set of needs in order to remain true to its mission. Academic libraries are part of that balance within the larger institution and must develop strategies on their own that support the institution's mission while also adhering to the principles and values of the information studies and librarianship profession.

Strategic intelligence is most often associated with military actions, plans, and policies to lead resources toward a successful conclusion of a conflict or potential conflict. Wells (2012) discusses strategic intelligence as the purposefully "steering" in a winning direction. He also associates different levels of strategic intelligence with the inertia of what is driving the need for change or the lack of awareness that change is needed.

Academic libraries have been forced into a change mode, since the Internet provided users a means for finding information on their own. Since then, these changes get modified frequently due to the changes made by other organizations that impact the library. Vendors seeking a competitive edge, systems enhancements that provide data faster, changing formats that are marketed commercially and a rise in user expectations, parent organizational demands of sharing costs or adding services, are examples of changes being made consistently in the last 20 years. Much of this change is being facilitated by librarians those who did not experience these types of curricula in library school or worked on the development of those changes internally.

This reinforces the need for strategic planning and consideration in terms of an academic library's human resource needs and philosophy. Hernon and Matthews (2013)

describe a "sweet spot" of competitive ideals in which librarians should focus their strategic energy in order to maintain relevance and competitive advantages. This sweet spot is the convergence of a library's capabilities, customer or user needs, and competitor's offerings. Each of these has broader and diverse layers of complexity as it relates to librarians and staffs those who work through these ideals.

The human resources consideration within institutions of higher education is also undergoing change and is impacted by current economic conditions. Evans and Chun (2012) point out that by drawing the elements of human resource consideration into the strategic planning, an advantage can be gained with proactive contribution and leadership. Larger academic libraries have begun bringing human resource representation to the table, either from the institution's human resources department or by incorporating the human resource positions onto library staffs. This trend allows for the elements and activities related to human resources to become part of the strategic planning process and demonstrates a higher level of strategic intelligence by recognizing these advantages.

### 1.2 Strategic intelligence to strategic planning

Strategic planning in itself is not new to academic libraries. Traditionally, long-term strategic plans were developed and put into place to provide guidelines as to the library's output for the larger institution. In more recent times, the strategic planning process occurs more rapidly due to the changes discussed previously with technology and competition. In Wells's definition, he discusses three different levels of strategic intelligence as follows:

- Least intelligent—does not recognize the need to make changes.
- *Higher or smarter intelligence*—recognizes the need to change based on the external factors and react accordingly.
- Highest intelligence—foresees the upcoming need for change and change faster, thus influencing those external factors to their advantage.

Higher education institutions can be complicated and bureaucratic and the libraries within them could be much the same. The organizational culture of the institution would have an impact on the libraries and vice versa. Part of preparing for strategic planning activities is to address where the institution stands with regard to organizational development. The strategic intelligence of the larger institution can have political implications on how strategic planning is accomplished within the libraries.

Birdsall (2013) recognizes the political aspects of strategic planning within academic libraries and offers advice on success strategies. He postulates that strategic plans for the library must be accepted by the affected constituencies in order to relevant to a course of action. He also stipulates that it is important to have alliances and coalitions supporting the strategies from library stakeholders, and finally to create persuasive and attractive planning documents that are tools for change.

Academic libraries typically enjoy low turnover and people stay in positions longer than in a lot of other professions. This is good for the cost associated with turnover

(Fitz-Enz, 2009) but raises the issue of talent management; does the library have the right talent to meet strategic objectives? This will be discussed in more detail later, but it is important to point out during the strategic planning process. Part of understanding, the strategic intelligence of any particular library will be to understand the willingness to change and plan strategically in a subjective method.

Although academic libraries have discussed strategic planning for years, changing times call for a broader approach to the process, such as a more holistic approach called strategic engagement (Singh, 2013). Singh advocates for strategic engagement through development of a culture of strategic thinking, in which stakeholders learn to think strategically on a daily basis. This can provide a competitive edge as the value of libraries is challenged in many different venues. Library leadership who encourage open and collaborative communication about issues related to strategic thinking will find a stronger commitment from library staff.

### 1.3 What's changing?

In 2011, the University Leadership Council, as supported by the Education Advisory Board in Washington DC, published their research findings related to the changing mission of the academic library. Titled *Redefining the Academic Library, Managing the Migration to Digital Information Services*, this work is the collective wisdom of many high-level academic librarians and related associates, who are in the business of defining the changes that are occurring and need to occur in order for academic libraries to remain relevant and support their home institution's mission and values statement.

This work addresses the change that is occurring or transforming the academic information environment to be centered in four major principles: unsustainable costs or support from the academic community, viable alternatives for information seekers, declining usage of libraries' resources, and new demands by patrons outside of the traditional library business model. And of course, this all leads to library staff and how they must be redeployed or change, in order to meet these new skills and competencies.

In 2012, the Association for College and Research Libraries (ACRL) Research Planning and Review Committee published their top 10 trends that are affecting academic libraries in higher education. These trends reflect similar findings as the University Leadership Council with changes in technology, user expectations, and needs as well as changes to the larger institution, figuring predominately in trends to follow. One of the 10 trends identified was staffing and the ability to develop staffs who can meet these changes and new challenges either through hiring practices or redeployment. This trend was supported by researching and observing conference activities and other professional development actions related to changes to staffing expectations.

This ACRL Research Planning and Review Committee followed up with the publication of an Environmental Scan 2013, which was a scan of the environment in which those trends developed in order to provide the broader context in which academic libraries need to operate and consider. This report also addresses the profession itself

and the shifting of traditional jobs toward unmet and sometimes unknown needs of the communities being served. The report quotes Brian Mathews taking an entrepreneurial approach to changes in staffing models. He says, "Anticipating and preparing for new roles and how these roles can expand and evolve over time will be key to an enduring, and thriving profession in the future" (Mathews, 2012).

This complements Wells notion that the higher level of strategic intelligence can foresee the need for change and react quicker and sooner. Mathews advocates that rather than trying to improve services or functions, consider instead developing new service models and functions that better meet the needs of patrons and library users. This can be a major change of thinking for incumbent librarians devoted to tradition.

The Environmental Scan 2013 also discusses library science education and the importance of graduating librarians with new skills that will meet the changes permeating the profession. These skills should not only be technical in nature but should include soft skills, such as being creative or innovative and willing to take risks. The library science education challenge is also broader from the perspective of talent management and a trend to hire non-MLS degrees for specialty areas or subject matter experts for particular disciplines.

Another point of view comes from Priti Jain, Associate Professor for the Department of Library & Information Studies at the University of Botswana. Jain provides a correlation between the advancement of information and communication technologies to the changes imposed on academic librarians. Jain (2013) purports that these changes to the demands of the profession will either see librarianship as a dying profession, in which traditional concepts are simply no longer desired or a dynamic profession in which librarians embrace the opportunities and challenges of needed change in order to provide enhancements to those seeking to find and to understand information.

Brad Lukanic, Executive Director of CannonDesign's a global design firm recently commented on the changes occurring in academic libraries in which he recognized the advantages that technology was bringing. He recommends four key areas that institutions should focus on, in their own voice as is best suited for creating academic scholarship. His recommendations are:

- · Libraries must respond to strategic campus and business needs.
- · Libraries need to have technology infused in all aspects of services provided.
- · Libraries must be flexible to address future changes as well.
- Libraries must have places to engage, offering appropriate spaces for group work and collaborations.

Lukanic sees technology as a positive conduit to move libraries forward in providing information discovery and knowledge creation options.

### 1.4 The financial environment

Academic libraries have faced financial declines for years. Recent years have been impacted by the global financial crisis of 2008/09 but prior to that a trend was already emerging. Davis (2011) identified financial trends from a study analyzing library

statistics from 1998 to 2008. Her report concluded that in this time frame overall total library staffing decreased by 1.6%. Her numbers demonstrate across the academic classifications that the percent of librarians increased, while overall staffing from support staff, assistants, and students decreased to bring about a net decrease. It is speculated that this is due to the complexity of work associated with academic libraries in that time period.

The full impact of budget reductions occurred for most institutions in the 2009–2010 budget cycle. For example, large research libraries are listed in an American Libraries column (Kniffel, 2009) reported significant cuts to the 2009–2010 with an expectation of addition cuts in the next fiscal year of 2010–2011. An ACRL survey conducted at the same time identified not only the budget cuts but also increasing costs as the most challenging issues of the time.

And this was an international issue as reported by Research Information Network (2010). Based on the data collected in late 2009 from senior librarians, their report addressed the financial changes from a decade of growth to declines in budgets, stemming from reduced governmental support as well as endowed or development-related support to institutions of higher education. This was analyzed in two distinct ways, resources: both cost and distribution, and staffing which impacts activities and services. It is the impact on staffing which has produced the need to look more strategically at how services and activities are related to the cost of staffing and the resulting efficiencies or inefficiencies produced.

This means that academic libraries would need to balance, first between paying for resources and staff and secondly regarding staff, between how related services and activities were impacted by library staff's abilities and skills. Also to be considered is new services or activities needed or requested and how to prioritize what could or could not be accomplished. This type of scenario is what drives the reorganization or repurposing phenomenon.

Come forward a few years to the American Libraries Association's (ALA) State of America's Libraries Report for 2013 and you see the same financial issues still exist but now with more focus. This report identifies growth areas within academic libraries as publishing, data curation, and staffing. Staffing in this case refers to future roles that will be needed by new library school graduates. The wide spread concern over how to balance spending and maintain services has been more clearly defined for academic libraries. An ACRL discussion at ALA Midwinter's Meeting identified these top 10 trends for 2012 and includes the staffing implications:

- Communicating value—activities related to justifying investment in the library but the higher institution larger organization will be an ongoing concern and should be strategically managed.
- Data curation—library staff will become more involved in working with a variety of data
  types and this requires working with faculty and researchers with regard to needs, preservation, and access. Communication and collaboration skills become increasingly important
  here.
- Digital preservation—digital collections grow and mature and will need standards and policies for long-term access and storage. Decision-making skills will be essential to provide leadership for moving forward with these issues.

- Higher education—academic libraries must keep an eye on the trends related to higher education and the impact that has on libraries. It is not only about communicating value but also about demonstrating a return on investment (ROI) to the university or college who has many demands and requests for funding.
- Information technology—technology is a driver of change in many cases. For the academic library, keeping informed and trained on new skills related to new technologies is important.
- *Mobile environments*—users and consumers of information are increasingly expecting a transition to mobile applications for their information needs. Providing mobile services require new skills and perceptions to satisfy these new expectations.
- Patron driven acquisitions (PDA)—the trend of increasing use of ebooks creates many staffing changes, such as the decline of processing print materials as well as licensing and negotiation of options for ebook access and use.
- Scholarly communication—new publishing models, such as open access journals and institutional repositories, create new opportunities for creating and managing the scholarly output of the institution. This also creates the opportunity for new skill development if libraries expect to be actively involved.
- Staffing—as a trend, library staff must be able to recognize, and react to users who have now
  evolved, through technology or online learning opportunities. This means assessment of
  needs and retraining as required to access and instruct on information in new ways.
- User convenience—becomes a primary driver in how users perceive the library and the librarians. Seeking ways to form that type of a relationship and focus attention on the desires of the user will be skills that are valued and supported.

A more recent study, published by Unisphere Research, shows how those trends are shaping up in a period of economic improvement. Trends continue to move toward technology and electronic resources as well as libraries learning to demonstrate value to the larger institution in order to fight for dollars. McKendrick (2013) acknowledges that the value sought is divided between the physical needs and virtual needs in an ever increasing distance education environment.

McKendrick's document is a benchmarking study on how academic libraries will be spending their budgets in the 2013/2014 academic year. Personnel and staffing costs continue to be the leading use of budget dollars at 46% almost half of the total budget. But rising materials costs, reduced income from enrollment declines and the need to support physical and virtual educational activities are driving changes to these models through cost cutting strategies. The impact on staffing is seen in salary freezes and cuts to staff travel.

Huge cuts to materials and resource subscriptions can create a backlash from library stakeholders who see the impact in the classrooms and research. This trend indicates the need to balance resource spending with personnel spending and insure that personnel spending are strategic viable going forward. Demonstrating that value represented by library staff and personnel are critical in the strategic planning process to ensure cooperation with stakeholders during critical budget decisions.

This need to demonstrate value was captured and studied by the Association of College & Research Libraries resulting in a report prepared by Dr. Megan Oakleaf, *The Value of Academic Libraries, A Comprehensive Research Review and Report*. This report captures the key points that focus on an academic libraries' value to the larger institution and blends trends and economic realities into its discourse on assessing internal activities. While not addressed directly on the human resource impact, the parameters and topics of the study provide a framework from which human resource strategic planning can take place.

A direct mention of the human resources impact comes from the Ithaka S+R US Library Survey 2013 which tracked the strategic direction and leadership dynamics of academic library leaders. Their findings, related to staffing concerns, focused on two areas: limited staff capacity and skills along with the need to bring into the organization new skills in emerging areas, such as web services, digital preservation, instructional design, and information literacy services. This becomes concern for budget allocation to staffing, new or developmental, and moving away from traditional services, such as reference, technical processing, and print collections management.

Academic research libraries, in particular needed to shift their focus from collections and traditional services to placing a greater emphasis on supporting the institution's strategic initiatives and mission. Thus many academic libraries began a move toward developing organizational units to accomplish this type of change when the recession hit and forced everyone into a survival mode. This strategy can have its successes as documented by Franklin (2012) and his experience at the University of Connecticut Libraries, who moved from surviving to thriving by aligning their organizational structure and strategic initiatives with the University's academic plan. Franklin (2012) describes five areas of strategic goal driven initiatives: Undergraduate Education, Graduate and Professional Education, Research, Scholarship and Creative Activity, Diversity and Public Engagement in which the libraries demonstrated a high degree of strategic intelligence in order to thrive in a tough environment.

The key to meeting and reacting to financial downfalls is through evidence-based practices and that would include planning for human resources needs, be it knowledge, skills or abilities, or the individuals performing the work. Assessment of human resource components of any organization is important for financial efficiency. In the previous example at the University of Connecticut, as strong program of assessment helped drive strategies and reinforce decisions (Franklin, 2012).

Finally regarding the financial forecast going forward, Lowry (2013) assessed the impact of the recession for Association of Research Libraries (ARL) asking the question of when to expect to get back to pre-2008 budgets. The answers were not optimistic due to the volatile nature of many factors over these last 5 years. Vendor models are changing, having an impact on acquisitions, government support is stressed putting budget decisions into higher level decision-making scenarios and staffing needs are changing as technology continues to evolve. Current strategies to offset financial short falls from the personnel needs include: eliminating vacant positions, hiring freezes, staff layoffs or furloughs, and early retirement programs. Many of these strategies also create the need for repurposing or reassignment of staff, to be discussed later.

### 1.5 Driving an assessment of human resources value

Assessments made for determination of resource acquisition and allocation only, does not lend itself to a strategic intelligence model associated with the human elements of the organization that can see, hear, and feel those actions that mandate oncoming change. The marketing of strategic activities around assessment and value creation

will help to ensure that these efforts are not made in vain. Germano and Stretch-Stephenson (2012) address the issue of academic libraries that, as nonprofits, cannot produce measurable value due to the intangible nature, or lack or revenue generating, activity that is involved. This marketing effort is important for connecting what the library does and stands for with user needs, which can be very diverse across different constituencies.

Germano and Stretch-Stephenson (2012) also point out that within the marketing cycle or activity, critical information is gathered that if viewed and utilized properly, can make a significant difference to the libraries' strategic intelligence. This can generate user data that not only demonstrates present value of resources and services but can also show trends for perceived future value. By aligning a strategic vision with competitive factors influencing the libraries' value, strategic planning can then look at whether or not the human resources are aligned with what needs to be done going forward.

A method for doing this could be the principles associated with the balanced scorecard (more below). In this context, the balanced scorecard perspectives and inquiries could be developed as follows for academic libraries:

- Customer perspective—how does the larger campus view the library and its functions, services, and contribution to the overall mission of the larger institution.
- Internal perspective—what should be libraries be good at or excel in a way others on campus
  do not.
- Innovation and learning perspective—how can the libraries improve and maintain value as
  environmental changes occur across the board.
- Financial perspective—how does the library justify its cost and ensure a return on the financial investment being made in a time to tightening budgets.

By creating measures linked to these perspectives, this type of assessment can provide a balanced point of view for assessing the value that can be placed on the library as an organization. With a library as organization driven by people, using measures related to the human resources function will assess effective strategy related to determining the value of the library's human resources strategy.

### 1.6 Making it credible

An overall concern when considering the creation or updating of strategic plans is to ensure it is credible and useful for influencing stakeholders and patrons. Especially with library staff; library staff must be viewed as instrumental in the execution of the libraries' mission, given other options available, for the economic investment they represent. Part of the credibility owed to the strategy is that the librarians and staff are perceived as valuable to the operation and mission.

The concept of strategic credibility is important in business, in particular when investors are taking a risk with their monies. Diffenbach and Higgins (1987) defined strategic credibility as the way others view the overall institutional strategy and its ability to plan and provide a strategic direction. Having a sound strategic direction also

assumes that management and organizational leaders will have a plan to operate on that will have strategic benefits, or be competitive.

Staines (2009) conducted an analysis of US and Canadian research libraries to determine strategic credibility as it related to reporting out on their strategic planning processes. Most academic libraries create some form of strategic plan annually but she found that many have stopped creating the annual report that provided an assessment of the results. Her recommendations highlighted the importance of communicating our results from the strategic planning process. This includes the strategy behind hiring and retention of librarians as it relates to changes that have occurred in the strategic planning process.

Strategic credibility should not be confused with the institution's image of the administration or management (Diffenbach and Higgins, 1987), but should be the underlying background and purpose for decisions being made or actions being taken. This can be particularly important with decisions made regarding human resource elements, such as hiring, repurposing, or terminations, as they will usually require additional justification. Both Staines (2009) and Diffenbach and Higgins (1987) saw credibility with the human resource components as vital to communicating the overall success of strategic planning.

Communication is a key component to establishing credibility to strategic initiatives coming from the planning process. Demonstrating and communication good outcomes or performance values is great, but communicating how they were strategically and purposefully achieved is even better for making your efforts credible. Added to that the need to emphasis the libraries' role or professional expertise and credibility can be a crucial factor to consider.

### 1.7 The need for strategy

There are multiple advantages of having a strategically intelligence organization that creates, implements, and assesses strategic planning activities. Strategic planning is critical to provide focus beyond vision and mission statements as well as broad organizational goals, in order to provide direction to staff. Strategic planning provides a level of detail that move people forward and without it they will decide themselves how to make things work or how to interpret goals and objectives for their own system of execution. In an academic library, this includes having a strategy plan for developing human resource strategies that meet the needs of both the library as an organization but also the larger institution and its mission to the academic community of stakeholders.

The current global environment calls for organizations to be strategic in order to maximize resources and efforts. Academic libraries are besieged with resources concerns related to changing user expectations, new and different product formats, an increase in choices for vendor business models, not to mention all of the technology enhancements being introduced into the way learning is achieved on campuses. This calls for strategic human resource planning to ensure that the academic library will have the skill sets needed to move the library forward in this dynamic environment.

Human resource strategies need to consider talent acquisition for skills, professional development for increasing institution knowledge in order to compensate for changes, performance management for driving a level of competence forward, not to mention the traditional aspects of human resource management, such as compensation, benefit administration, and employee relations. Much of these traditional services will continue to be driven centrally by a campus human resources department, but much of the strategic intelligence part will reside with the hiring organization and its strategic view of talent, performance, and development.

A common term used to describe or demonstrate value within a library environment lately has been ROI. As a business term, "return on investment" means those investors and others who provide support or investment into the business, are due a return or an evaluation of their efforts. In addition, ROI can be a measure of efficiency from the actions or use of "that which was procured." So in today's academic library, all parts of the university are being held accountable and must demonstrate measurable results of value to continue to expect funding to continue (Kaufman, 2008). The library is no exception and the personnel side of the equation can be significant since it is one of the largest expenses to the operation. Demonstrating ROI on the human capital can be critical.

### 1.8 The balance scorecard

Business and industry have utilized a Balance Scorecard approach to strategic planning for many years. The idea with this system is to provide measurements to what is being managed. The balanced scorecard is a strategic planning and system, to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals. Its use has extended beyond being only a business application but now includes government and nonprofit organizations worldwide.

The balanced scorecard approach is utilized to implement an organization's strategic plan from a concept to directives and action items for the organization to adopt on a daily basis. It provides a framework that not only provides performance measurements but also helps planners identify what should be done and measured. It enables administrators to truly execute their strategies. This concept recognizes the shift in the role of the organization's employees and how they contribute differently in the information age (Kaplan and Norton, 1996). This requires a reskilling of employee skills so that their intellect and creativity can be useful to achieve organizational objectives.

The original basic scorecard asks administrators to view the organization from a variety of perspectives built around four basic premises (Kaplan and Norton, 1996):

- How do we look to shareholders (the financial perspective, including such familiar measures as ROI, revenue, net income, and cash flow)?
- How do our customers see us (the customer service perspective, including measures of customer satisfaction)?
- What must we excel at (the internal process perspective, focusing on performance measures)?
- Can we continue to improve in creating value (the staff development and learning perspective, focusing on knowledge creation and innovation; Kaplan and Norton, 1996)?

Consideration should be given to this approach as over the years since the initial development, the balanced scorecard method for developing strategic plans have begun to be used in nonprofit and educational organizations. Michelle Reid identified some of the benefits for academic libraries who could choose to use this method (Reid, 2011):

- · justification for increased funding;
- · building stakeholder awareness and demonstrate accountability;
- provide metrics that align and support the library's role on campus;
- · support assessment and accreditation activities;
- · provide framework for development for internal standards and ethical issues; and
- · increase productivity and effectiveness of staffing.

As a strategic intelligence component, use of balanced scorecard methods can demonstrate an organization's recognition that changes are coming and the need to strategically modify current operations and services is mandatory. Figure 1.1 shows how these changes can be reflected in a balanced scorecard set of perspectives for an academic library.

The literature has multiple examples of the use of the balanced scorecard, including a program through the ARL.

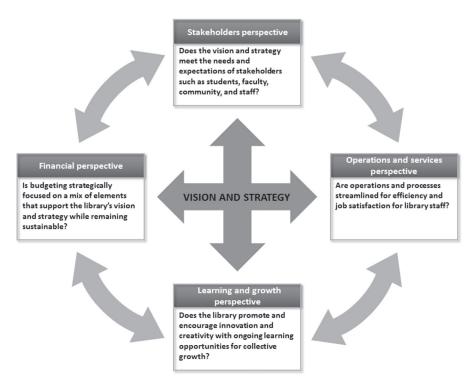


Figure 1.1 Balanced score card.

### 1.9 Knowledge management

Another consideration for strategic intelligence can be knowledge management. Higher education institutions, along with their academic libraries become creators of knowledge through teaching, research, and service activities. Townley (2001) describes knowledge management as the set of processes that create and share knowledge across an organization to optimize the use of judgment in the attainment of mission and goals. Or more simply, knowledge management is the art of creating value from an organization's knowledge assets.

Librarians, through services related to reference, cataloging archiving, etc., have applied many principles of knowledge management in performing these services in supporting the institution's mission. Townley's example of this is compared to a pyramid in which knowledge is broadly at the bottom, in the form of data, and as academic libraries process this data and give it context, it becomes information to share and provide access to. This can have a tremendous influence on strategic human resource practices in an academic library.

A good example of this would be considering a point of view that librarians as information professionals, can also become information practitioners as it relates to what someone intends to do with available data (Westcott, 2004). Westcott, citing a business context of perspective, considers the role of the librarian as content regulator through the development of knowledge into information. This role includes guiding or leading users toward needed information in prescribed ways.

From the human resources consideration, Koenig (2012) describes the stages of knowledge management development: information technology, human resources and corporate culture, and taxonomy and content management. As the knowledge management has grown conceptually and in practice, the recognition of the impact on the human element has become apparent, both in how organizations learn and the impact it makes on corporate or organization culture. Once again the opportunity here is for librarians to be able to connect content with users.

With our strategic intelligence definition referencing change, the ability to predict and react faster and more effectively to upcoming changes, academic libraries have an opportunity to assist the larger institutions in managing its organizational knowledge and scholarly output. A trend in the last several years has been the development and stewardship of institutional repositories to house the institution's scholarly production. These types of changes have changed the strategic direction of academic libraries to focus more efforts to these types of activities in support of research and scholarly communication objectives.

### The strategic planning process

Creating strategy is a process for being sustainable and achieving success with an organization's primary mission. This becomes the framework in which decisions are made, processes are developed, and choices are evaluated that impact the organization's value. These decisions, processes, and choices define an organization's competitive position (Cascio and Bourdreau, 2012) or in the case of an academic library, its value and relevance in the higher education institution. Organizations should not be static but dynamic and on the move, strategic planning helps to make those moves in the right direction.

Strategic planning can cover many elements depending upon the level of detailed need or desired. Obviously the more detailed and extensive of an effort that goes into the planning process, the more likely it is to be successful in the execution and overall results. Many different perspectives exist regarding steps to be taken in the strategic planning process. What follows is the highlights from several points of view, to help to determine what approach is right for you.

### 2.1 SHRM's strategic planning phases

The Society of Human Resources Management (SHRM) is the largest association in the world, dedicated to representing the human resources management profession. This is a multinational organization that provides expert advice and advocacy for the field of human resource professionals. As part of a certification process, human resource professionals are tested and then continually evaluated on work accomplished within the profession.

SHRM partners with both the American National Standards Institute (ANSI) and the International Organization of Standardization (ISO), to provide appropriate human resources practice and activities guidelines from which to follow. The SHRM Learning System offers these professionals as a body of knowledge, as established by the Human Resources Certification Institute and developed by a team of subject matter experts within the field.

Per the *SHRM Learning System* (Society for Human Resource Management, 2009), the strategic planning process is the best established using a four-phased approach:

- · strategy formulation;
- strategy development;
- · strategy implementation; and
- strategy evaluation.

Strategy formulation is about developing mission or vision statements, which most academic libraries already have. In renewing or updating a strategic plan based on the changes to economic support or the changes within the larger institution, a review of these mission statements and intended vision is appropriate. This can also be a great opportunity to involve library staff in reassessing or developing new versions of who you are as an organization (in this timeframe), what you do and why (with new technologies and tools), and who are you serving and how (in a Google age). This can lead into establishing a list of values for the organization that will guide the execution of the vision and mission.

Strategy development is the gathering of information that will be needed to influence the planning process. This can include a SWOT (strengths, weaknesses, opportunities, and threats) analysis which is identifying the organization's SWOT. In an era of change, this might be difficult as some perceptions of traditional strengths can also be considered new weaknesses, in trying to move the organization forward. And some threats might need to be seen as opportunities, for example; if budget declines are a threat, holding the organization back they might also provide an opportunity of seeking alternative revenue resources.

Another form of gathering information can be an environmental scan, which is gathering all the relevant data about external factors that influence the organization's operation. For academic libraries, this can be looking at a broad view of the traditional librarianship values such as who is seeking information, how are they evaluating it and using it, what alternative resources do they have, and is the library keeping up with the technology they seek? This might become delineated into library departments that face different external factors in their service models. And this could include that has changed within the external environment over the last several years that impact the work being done currently.

The third phase listed by SHRM is strategic implementation. This starts with the establishment of short-term objectives or goals, which can be measured as a strategy's effectiveness. This will include creating action plans as to how resources will be distributed and how to communicate effectively, so that staff remains motivated and willing to implement the strategic directions desired. This is a critical phase, because this becomes the point in which employees are asked to do something different, assuming that the short-term goals that have been established is moving the organization in a different direction based on the changes to the environment or profession. The academic libraries have identified changes that need to be made in order to stay in sync with the larger institution, this can be the most difficult phase to implement.

Gaining employee "buy-in" is critical to the success of implementing these strategies and should actually be considered a strategy within itself. Library staffs need to know the challenges that the organization is faced with and how the proposed strategies will benefit them as individuals as well as make a different for the larger organization. Some suggestions from SHRM that could be utilized in this phase include: providing learning opportunities, recognizing team efforts, and ensuring that communication efforts reach and are understood by everyone concerned.

The final phase is strategy evaluation. This is a review of the strategies implemented to measure or to determine if differences were realized or not. Or, if the strategy itself is in need to change or "tweaking" so as to realign and still be positioned for success.

This phase also allows library staff to provide feedback on what is working or what is not working. Once again, this is important for "buy-in" to maintaining a strategy that is creating needed change within the organization.

SHRM's point of view with regard to the strategic planning process is that by having a human resource professional involved, who is committed to organizational goals and health, a total organization benefit, can be gained with objective and learned feedback. The human resources role is to be more of a consultant, which can develop and build partnerships across departmental lines within the larger organization. At this level of involvement, the human resources professional should understand or learn much of the basic industry information about the function of the organization.

In an academic library that does not have a human resources professional on staff, hiring an outside consultant or someone from the campus human resources department is appropriate during the strategic planning process. This role is important due to the strategic changes and the impact it might have on the employees within the organization. The strategic changes could impact positions, job descriptions, repurposing, training, and development need or possibly even lay-off. Having a human resources partner focused on these issues can help move initiatives along easier.

### 2.2 Strategic planning in higher education

Earlier literature regarding higher education planning activities refer to incremental or multilayered processes and budget driven limitations as it relates to effectively conducting long-term planning activities. Academic institutions, unlike their corporate counter parts, usually suffered from a lack of useful data and ended up with descriptive phrases rather than process driven goals and objectives.

More recently and also driven by tighter accreditation standards, higher education planning has become more strategic so as to tie funding and political considerations into more accountable and measurable outcomes that support the business or mission of the specific institution. Hinton (2012) outlines the contemporary strategic plan in higher education institutions and how separate components are necessary to provide a process, but also support each other for long-term effectiveness.

Hinton's (2012) breakdown of the strategic plan is outlined as follows:

- Foundation
  - · Mission statement
- Supporting components
  - Values
  - · Institutional goals
  - · Vision
- · Strategic plan
  - · Goals and objectives
  - · Implementation plan

These components of strategic planning offer a linear progression toward implementation that provides a framework for packaging the entire plan for stakeholders. This also provides targets for assessing and measuring specific outcomes related to how the institution is growing and developing.

This assessment of institutional effectiveness would also include human resource attributes, usually most importantly, compliance with legislative regulations, policies, and procedures. For the academic library, this adds a layer of support from the larger institution, that human resource strategy is tied to assessment and compliance measures.

### 2.3 Strategic planning in the library

In her chapter on *Strategic Planning*, Mary Wilkins Jordan (Velasquez, 2013) outlines the basic strategic planning process in this practical guide for library management. She outlines the basis steps as:

- · gather data;
- · assess the current situation;
- set goals;
- establish evaluation standards;
- · implement the plan;
- · assess the plan; and
- · celebrate.

Jordan framed the strategic planning process in libraries to occur about every 5 years but acknowledges this varies by library and needs. The level of strategic intelligence that the library has attained would impact each of these steps, both in a positive or negative way. These steps offer similar actions as SHRM but are rooted in library experiences from Jordan. Her suggested steps are:

Gathering data—is about pulling together the information that will impact the operation and/or services provided by the library. This is everything from budgets, marketing plans, policies, and procedures to staffing information such as job descriptions and competencies. Annual reports are a good source of, not only data or statistics but also trends as to how quantitative measures look over the course of several years. A typical example discussed in the literature is circulation rates that are in decline for print materials. Academic libraries might focus on data related to teaching information literacy or research assistance to faculty.

Assess the current situation—understanding what the organization's current strengths and weaknesses are essential to for continuing any kind of useful strategic planning. As with SHRM's phases this is called a SWOT analysis, an analysis of the organization's SWOT. Since our subject is human resource, that becomes the strategic component on which to focus the analysis. This might include analyzing the skills of library staff and comparing them to emerging trends within the industry or looking at threats from declining library use to find out where patrons are seeking their information, i.e., a search engine or direct from faculty or other students.

Set goals—this is defining what you want to do or need to do, as determined by your analysis of both internal and external factors. This is part of SHRM's strategic implementation phase of establishing goals and action items. Jordan refers to the management SMART, related to goal setting, which stands for Specific, Measurable,

Achievable, Realistic, and Timely. Some folks also refer to SMARTER goals which include Evaluate and Reevaluate, which is later in Jordan's steps.

Establish an evaluation criterion—which means determining what success looks like as action plans are implemented. Creating the link between the goals and action items you want to accomplish to how those actions will be analyzed and evaluated is critical for good success. Library staffs involved in developing a plan also need to know what to look for as they are implemented to determine goal achievement, modifications needed, or failure of the actions taken.

*Implement the plan*—sounds obvious but can be bad for morale if time is spent gathering data and creating plans, only to not move forward with the implementation. Part of the communication process associated with plan development and analyzing data, is to build momentum for organizational improvements; a delay in the implementation will lose that momentum and cause frustration.

Assess the plan—is back to considering SMARTER goals that include evaluation of progress, not once but ongoing, in order to ensure the path to change is the right one. Allowing feedback from staff involved on individual pieces of the action items and then reporting on that feedback to the larger organization is instrumental to making changes that last long term.

*Celebrate*—is acknowledging the work and effort it took to develop and implement plans that improve the overall performance of the organization. A celebratory demonstration of what was achieved provides a solid foundation for sustaining a culture of change.

Jordan's chapter offers some case studies as well to demonstrate how her steps to strategic planning worked in practice. Further in this book will be some examples for academic libraries, in particular, and how these steps were found to be useful.

### 2.4 What can go wrong?

Proper planning for strategic change is useful, with phased approaches and steps to take for success, but many things can go wrong in the process that impact success or failure in making changes. Studies linking failure factors for strategic planning activities have been done; a useful one is from the American Management Association (2007). They commissioned a study from the Human Resource Institute regarding strategic planning and its effectiveness. They cited the following reasons for poor results from strategic planning activities:

- · Clarity of goals and expected outcomes unclear, a clear strategic is needed.
- · Strategic plans not aligned with organizational goals.
- · Adaptive organizational infrastructures.
- · Lack of leadership development within the strategic planning process.
- · Lack of employment engagement or adequate communication.
- · Not address resource allocation properly.

Add to this list, the concept that not all strategic planning is strategic in nature but instead is a reactive form of resource allocation (Matthews, 2005). This implies that

the vision of positive organizational change is not proactively seeking to become a better organization but instead is being forced into changes due to circumstance, like economic limitations.

Although strategic planning is considered to be an important factor in moving an organization toward success, the daily execution of the activities are not always valued or prioritized. A study by Cervone (2014) demonstrates that how agile methodologies used in software development can be adapted to the strategic planning process to be more effective and garner better engagement by the employees. He speculates that because strategic planning can be different for each organization, the opportunity for apathy within the execution can occur with different perspectives.

From the field literature on strategic planning, Cervone identified seven potential problems that can cause strategic planning to fail or go astray. They are:

- · leadership failure;
- · problems within the organizational culture;
- · exclusion in the process;
- · failure to integrate planning with the organizational operations;
- · poor execution;
- · poor metrics and goals; and
- too much formality and structure in the planning process.

Agile methods that Cervone considered recommend short iterations of activity, rather than longer or lengthier projects. He also emphasized that stakeholders should have direct communication in all phases of the process. He used as an example a "Scrum" model which provides a process for stopping and starting the work on a plan, thereby making it shorter and more manageable as well as continuous or ongoing. By strategically adopting these methods, Cervone (2014) felt that the organization would gain efficiencies working as a team, resources would be better enabled, shared, and transparent for all of the organization to see and measures could be tweaked to provide overall better understanding of what was happening.

All of these issues could apply within an academic library environment which is driven by the people employed there. It needs to be recognized that developing a strategic plan is not the same as implementing the plan with the decisions, processes, and choices to be identified for moving forward. The implementation of the strategic plan is a critical concern that needs to be addressed as a people process in order to warrant successful outcomes. At the end of the day, it is all about the people (Delprino, 2013).

### 2.5 Benchmarking

Part of a strategic planning process could include benchmarking with other academic libraries. This process is identifying and evaluating services, processes, and workflows of similar organizations in order to establish a view of the best practices and compare to evaluate how your own plans are being developed. In academic libraries, it is common to have a list of peer institutions, of similar size and academic missions, in order to view how strategies have worked in other institutions or what did not work

and could have been done differently. Benchmarking is about observing how a process or decision has worked elsewhere in order to emulate or avoid consequences of similar actions (Smith, 2006).

Benchmarking can be tricky in academic libraries due to the eclectic nature of higher education institutions. In determining what constitutes a "best practice," it is important to understand the differences and similarities within the organizations being considered. The idea is to understand the value that adopting a practice from another organization can represent.

### 2.6 Understanding and supporting the strategy

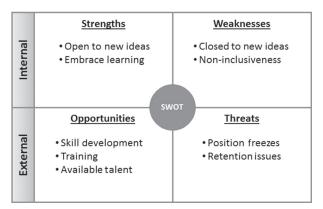
Part of the strategic planning process will be to gain support and acceptance for the changes that will occur as a result of implementation. Even back in the 1990s, it was recognized that political beliefs, loyalty issues, and resistant to change could hamper successful implementation of a strategic plan (Birdsall, 2013). Academic institutions can be complex and organizations and library staff are integrated into the campus in many ways, both formally and informally. Marketing the plan will require a persuasive point of view which should include supporting information gained in environment scans, SWOT analysis, or a PEST analysis which is a simple tool that helps to analyze the political, economic, sociocultural, and technological changes that can occur within the organization.

The roots of environmental scanning can be traced to Sun-Tzu's *The Art of War* as a lesson learned for successfully executing battle. Know your environment is the key and the same can be applied to the higher education environment in which the academic library operates. Understanding the economic, political, and social factors surrounding the operations is important (Evans and Alire, 2013). Monitoring and watching other factors can make a difference as well in decisions to be made and strategies to follow. For example:

- · economic trends and budget apportionment activities;
- · vendors and their forecast for long-term costs;
- users and their behaviors related to information needs, and this could be different for students and faculty;
- · competition from other information providers including online sources;
- · changing technology trends that impact user interactions;
- · political changes that could impact relevance; and
- · cultural factors that could impact values and related behaviors of staff.

Continually being aware of environment changes and their impact on the organization, helps to provide incentive for engaging in strategies to meet potential challenges.

Another component in understanding and formulating the strategic is with a SWOT analysis. Similar to understanding the environment, SWOT is concerned with looking at specific external and internal factors related to making strategic choices. Externally from the human resources point of view, opportunities could be skill development or training opportunities, the job market, and talent available for hiring new skills, while



**Figure 2.1** SWOT. Modified from Noe et al. (2010).

threats could be the opposite, position freezes, or lack of competitiveness for retaining current staff.

Internally looking at strengths, this could include the organizational culture in terms of accepting new ideas and learning opportunities while a weakness could be limitations on inclusiveness or pursuing new ideas. Honest assessment of these factors can make a big difference in how strategies are both formulated and then executed. Figure 2.1 demonstrates.

### 2.7 Vision and mission statements

Most of the literature on strategic planning refers to the strategic vision of the organization first, or the mission statement of organizational purpose. But organizations change, modify, or update mission statements periodically based on the changing markets or institutional needs. Academic libraries over time, tweak the vision or mission for the libraries, as universities and colleges modify or change institution missions to better meet the needs of their base of stakeholders. This is usually community or target area for student recruitment based or if new programs/degrees are offered it could change where the organization wants to go or wants to achieve.

Either way, starting out understanding the vision or mission of the organization will be the important first step in the entire process. Gamble (2009) draws a clear distinction between an organization's strategic vision and their mission statement. He states that a vision is the future, where the organization what's to go, what the future scope will be, while the mission statement is an indication of the role of the organization is currently fulfilling.

Gamble (2009) continues his discussion to stress the importance of communicating that strategic vision broadly, so that stakeholders understand the forward movement of the organization. This includes the "why" of having these strategic visions about where the organization needs to be at some point in the future. Academic libraries

are starting to recognize that technology is moving forward faster and user needs are changing in diverse ways. Determining a vision to work toward with goals and objectives that support the mission can be an important motivator going forward.

### 2.8 Steps to be taken in the strategic planning process

To simplify the process in which strategic planning should occur, Figure 2.2 is offered, which is modified from various textbook adaptations.

A strategic vision or set of goals should be developed that give the organization a direction and future purpose. As part of the human resources function, this should include identifying and understanding the future set of skills needed by library staff for expected future changes to programming, services, and content curation. As this vision is developed and communicated, opportunities for incumbent development in these skills should be anticipated.

Benchmarking, SWOT analysis, and environmental scanning activities should occur continually and consistently in order to ensure that the organization is competitive and enabled to meet future needs as they occur. With human resource functions, this should include scanning for skills and creating internal inventories so as to match skills with needs and seeking or providing the training and development needed to improve competencies of existing staff. Feedback from human resources regarding competencies used broadly within the profession can influences a "tweaking" or review of vision statements as warranted.

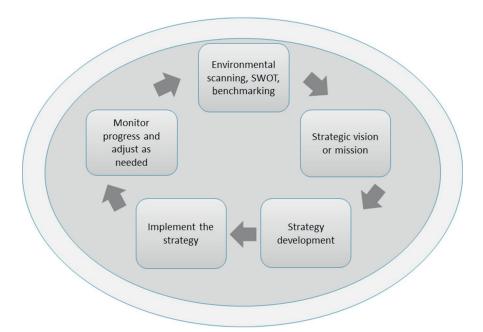


Figure 2.2 Strategic planning process.

In developing the strategy, to move the organization toward its vision, managers and supervisors are tasked with taking steps for follow emerging trends that suit the organization, while reducing or eliminating the activities that no longer added value to the organization. This has had great impact on academic libraries that are moving from warehousing materials to form more user focused collaborations and services.

As new strategies are implemented, they should be monitored for acceptance and feedback from all stakeholders to ensure the changes are appropriate and goal driven for moving toward that new vision. Ongoing assessment and making adjustments as needed, will keep the vision in sight.

### 2.9 Assessment of value, improvements, and goals

Periodically the organization should conduct a wider assessment of all of the activities related to implementing strategic change, revisiting benchmarks, strengths, weaknesses, and threats, so as to determine what value has been gained with strategic planning. Did the changes implemented create improvements, meet the intended goals, or move the organization closer to its vision? If not, this is the time to revisit the strategy to make changes.

Within the strategic planning process, one important distinction should be clear in addressing the human resources related to making changes. Noe (1999) describes the difference in training and development which has application here. When library staff is trained for new jobs or services, those skills are needed now, in the present. But Noe's (1999) point regarding development is that it is for the future. Developing librarians and staff is about formal educational experiences, job-related learning, assessment of abilities, and it is about relationship building, all with a future goal in mind.

As part of the strategic planning process, the human resources side of the organization, including managers and administrators, should focus on the development of current staff to meet the needs of a new strategic vision. When that is not possible, the organization needs to be prepped for receiving new talent and perspective from the outside.

# Human resources as a strategic partner

Academic libraries are, for the most part, a department or unit within a larger organization and therefore many of the human resource functions are controlled centrally. This would include much of the administrative processes related to payroll, legal compliance issues, benefit administration, and the pieces of managing and recruiting that are connected to systems and policies which are centrally implemented. Larger libraries have taken to employing their own human resource professionals who bridge and liaison activities between the libraries and central human resource services. This can add a layer of efficiency because of the unique nature that libraries and librarians have within the larger organization.

Academic librarians fall into many different categories or classifications across the profession. This includes librarians who have achieved faculty status through a tenure system or peer-reviewed process, librarians classified as faculty but in a nonteaching role and librarians classified as staff in some institutions. There is typically a relationship between librarian classification and the reporting structure of the library as an organization; for example, most of the libraries identifying librarians as faculty are part of the academic administration. In the case of a service grouping within the university, librarians classified as staff could mean the library organization is under business or student service components of the university.

The placement of the library as an organization is an important factor in how the library and its librarians will be strategically positioned within the academic structure of the university. The issue of tenure carries a set of pros and cons that also has strategic implementations and will be addressed in a later chapter. And the issue of internal representation by a human resource professional on staff within the library can also be a strategic component as long as that role is represented in the form of a position of administrative leadership.

The human resource definition, broadly stated, is a system to manage the effective use of employee resources within an organization. This includes providing processes, policies, and methods to direct employee knowledge, skills, and abilities toward organizational goals and to do so in an environment that is defined by the changing needs of intended stakeholders. The human resource functions for the organization is meant to support the mission and goals with strategic input as it relates to the utilization of people employed or associated with organization. Traditional functions include:

- recruitment, selection, acquired need talent or skills;
- compliance with employment laws and legal considerations;
- compensation integrity and benefit administration;
- · employee and labor relations;
- · evaluation of performance factors; and
- societal factors such as rights and equity issues.

These functions drive deep into the organization and are more effective and efficient in a strategic planning process instead of a reactive problem solving correction.

### 3.1 The higher education environment

At this writing the environment surrounding traditional higher education models and practices is changing, dramatically in some cases. These changes are related to funding, expected to do more with less, changes to expected outcomes for educating a workforce with focus on professional fields or disciplines that are in demand, such as STEM disciplines. Also in flux are changes to traditional stakeholder expectations, for example, the traditional undergraduate student experience. And in a digital age, change wrapped around technology and access to information also plays a critical role in creating a strategy or vision for the future.

An important consideration regarding changes that are occurring as it relates to strategic planning is organizational culture. Shugart (2013) states that, "The culture of the organization will determine the limits and possibilities of our strategies," in which he is advocating for a strategic change in culture to support needed change of institutional direction and operational models. Academic libraries have already felt the impact of these changes and are struggling with keeping up with many changes to technology, student expectations, and faculty needs, as well as vendor offerings, while sorting through traditional resources and services as a bridge to cultural expectations.

Another consideration within many elements or a higher education environment, which can affect both the academic library and the human resource management of the organization, is the issue of governance. Institutions of higher education can sometimes be considered an alliance of students, faculty, and staff that have different priorities and purposes collected into a common mission. But this misalignment of reasoning can make the change process much more complex, let alone hamper the strategic planning process.

It is important that the documents and methods used to govern and provide authority for individual interest groups contain flexibility and resiliency for being able to make change. Governance models should be included in the strategic planning process so as to support decisions affecting change that can move the organization forward rather than create a mechanism for resistance. Using information technology as an example, this is under constant change. Hites and Block (2013) include the governance factor in their strategy for success. They feel that solving the long-range information technology planning problem includes cultivating leadership, governance, and integrated planning into the process altogether.

### 3.2 Overall talent and recruitment in a changing world

The basic human resource functions related to recruitment and acquisition of human talent is focused on matching talent to the organizational need or desire. Traditional approaches to hiring for academic libraries usually were focused on the subset of

individuals with library-related education or experience. As technology and user needs have changed, so it has the attitude toward focusing solely on library credentials.

The other change to traditional pathways for hiring is that almost all recruiting activities are now accomplished through electronic means. This is almost a first level of competency related to working in a library environment, the ability to negotiate through the online hiring system used by most institutions of higher education. Job seekers should prepare themselves accordingly when pursuing a career in higher education and/or an academic library.

### 3.3 Human resource best practices

Good hiring practices require an investment by each hiring authority in order to bring in the "right" talent needed, without creating a high turnover environment. Turnover can be costly, as it generates costs from the time and effort of the hiring activities as well as lost productivity from position(s) being vacant. Many academic libraries work with a central campus human resource department to follow a common set of steps for recruitment and hiring. Some, usually larger, academic libraries have a dedicated staff or librarian who oversees the human resource functions of the organization and serves as a liaison to the larger campus institution.

Much of the role for a human resource department is centered on compliance with legal aspects of hiring for the protection of both employer and employees or potential employees. And most human resource departments on campus will have a wide range of functional areas to support the larger institutions management of the human aspect of the institution. There are usually four functional areas that impact the larger institution, as listed in Figure 3.1.

Within the library, these functions are either delegated or coordinated by others but ultimately must be held accountable to the central human resource department.

Focusing on the academic library staff, Munde (2013) has published a distinctively unique guide of best practices in an academic library. She covers all positions from dean or director to student workers and distinguishes clearly the difference between management people and developing positions. Munde's goal is to demystify the human resource functions that are vital to running a smooth operation through the human



**Figure 3.1** HR functional areas. Adapted from SHRM Body of Competency and Knowledge (2014).

resource lens. She recognizes the variation in organizational hierarchies that could impact local situations.

Although Munde is through in her details of human resource activities enacted within the academic library setting, her work does not provide the details for creating a strategic pathway for the organization through the human resource lens; however, some other resources have that are worth noting. This type of strategic planning, engaging with human resources for perspective, has just gained broad acknowledgement in the last 20 years.

Starting with the Society for College and University Planning (SCUP), they published in 1996 a sourcebook to provide academic planners with the tools to perform core functions and activities related to the coming changes to higher education. They foresaw the transformation of higher education institutions from knowledge provided cultures and organizations, to institutions focused on learner-centered activities. Part of this sourcebook recognized the need to include human resources in the strategic planning mix.

In her chapter regarding human resource planning, Carol Everly Floyd outlines some of the basic concepts to be included in higher education human resource strategic planning, such as faculty recruitment and retention, diversity, compensation, and roles/responsibilities along with adding the value to these investments in personnel. She called for a strategic vision that enhances the quality and accountability of human resource practices, while aligning the changes to the institution's vision and mission to changes needed in position responsibilities and impact on instruction.

Floyd recognized the connection between strategic human resource practices at a local level and national trends related to change, as well influence with accreditation programs and activities. She also outlined the competitive factors that would take place as more attention overall is applied to individual's quality and accountability to the local institution's net gain. Thus, the human resource element cannot operate in a vacuum but needs to be proactive and a part of the strategic planning process.

Over the years since Floyd's chapter, higher education has invested in strategic human resource planning as well as provided the framework for human resource activities to become decentralized to some degree. This leads us to academic libraries having a strategic planning process in place that supports library functions for the larger institution, but also supports changes and trends within the library and information science profession.

Many points of view for strategic planning can exist but only one collaborative effort will be effective. Basic best practices for human resource strategic planning evolve around the following:

- Assess the current situation—where is the skills of library staff now, what are their strengths and weaknesses, what is the environment in which the organization is operating?
- Setting goals and long-term objectives that improve the current situation—based on the user needs and expectations, what skills are needed to form relationships that are productive and vital to organizational growth?
- Provide options or alternatives to strategic need—can skills be trained, does new expertise
  need to be sought after, can current staffing be supplemented with skills from time limited
  options?

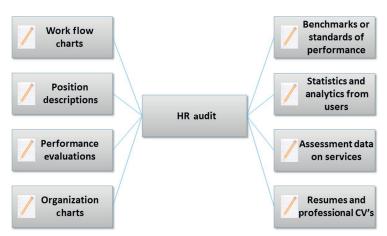
- Evaluate and make decisions based on the feedback or evidence—create a plan of action that can include multiple ideas, professional development of existing staff, hiring new skills both permanently and short term, contracting specific expertise as needed, are examples.
- Analyze decisions and evaluate impact to goals and objectives—develop an ongoing process
  of analyzing the effectiveness of each decision so as to modify if needed.

Creating strategic planning objectives that are human resource-based serve to provide leadership in a discipline that is usually seen as support based (Evans and Chun, 2012). Furthermore, taking steps, such as a HR audit, can strengthen organizational effectiveness through improved operational functions, better leadership related to front line services, improved administrative relationships for developing organizational capabilities, and stewardship of policies and procedures that support the organization's disciplines. The data in Figure 3.2 are to be used in a HR audit.

Evans and Chun (2012) also present evidence that by applying strategic planning principles, related to the human resource disciplines for organizations in higher education, traditional operational models that are based in silos can be transformed into significant improvements to an organization's capabilities. The academic library is no exception to this and as a common use entity on campus, can be a leader in human resource strategic planning.

### 3.4 Comparison of other professional disciplines

Business, industry, and the for-profit sector in the world of organizations usually have a financial investment with their stakeholders and thus strategic planning actions and activities serve to improve the financial situation for both the organization and the stakeholders. Environmental scanning can be about business models and competitive strategies that influence a variety of economic factors such as prices, cost of goods



**Figure 3.2** HR audit. Adapted from Evans and Chun (2012).

sold, and profits per share of investment. In looking at other nonprofit organizations, differences can be seen there as well.

Within the human resource functions of many companies, strategic planning can be a key factor in developing human resource policies and procedures. Benefits of having human resources involved in the strategic planning process includes: providing a sense of ownership and improved communications throughout the process. Human resources can also keep employees focused with clear objectives and avoiding distractions. And as new concepts are entertained, human resources can provide guidance on future training or professional development needs or opportunities.

Bingle et al. (2013) did a comparative analysis of nonprofit and public sector organizations and the management of their human resource functions. They cite as key differences with nonprofits and for-profits: the volunteer employment factor, the presence and role of a governing board, such as a board of directors and the emphasis that nonprofits place on strategic planning. This study is also referring to nonprofits as organizations that provide services of benefit to society without financial incentive. Higher education, along with academic libraries, can certainly fall into this category as the end result is an educated public, not a financial reward capable of modifying the institution. Those monies are indirect to the quality and efficiency of the services provided.

One of the biggest differences that can influence the strategic planning process between for-profit and nonprofit organizations is its governance and accountability. Companies are governed by a board and represent the owners or investors so financial gain is prime motivation. Nonprofit or government supported organizations represent a public interest and therefore mission and values of the organization are important motivators. In the strategic planning process, this can be an important distinction when establishing long-term goals and objectives.

### 3.5 Building the organization's capabilities

Strategic planning goals and objectives are about building the organization's capabilities for providing services. The organization will have regular routines and processes completed by individual members. The collective skills, abilities, and expertise of an organization are the capability as an outcome of good human resource practices and management. This includes how people work with the resources provided and the identity that is created for the organization by this shared endeavor.

Organizational capability focuses on achieving goals through employee commitment and competence. This means that strategically you want employees adding value to the stakeholders in a unique way. In an academic library an example might be demonstrating why a search in a database produces a higher quality result than randomly Googling for an answer. This adds value and the uniqueness to the relationship. Organizational capability enhances perceived value thru responsiveness, relationship building, and quality of service provided. Individuals have competencies focused in certain areas but organizations have capabilities from the collective effort.

People are critical to good execution of strategy and can be crucial to effective changes as well (Wells, 2012). Recognizing and utilizing the flexibility that training and developing people can bring can be a critical element of the strategic planning process, one that ensures continued organizational strength and capability. And building a culture of change can provide long-term benefits with employees who are willing to change as the strategy needs to change. Businesses have great examples of that, but academic libraries are just now recognizing the need to reinforce ongoing change into the organization.

## 3.6 Human resource influences to strategic planning

To put it bluntly, the human resource influence to the strategic planning process enables a higher quality of the human components of the organization in terms of skills, knowledge, and experiences. This influence should extent to the quality of the output from the human resources as per the performance standards, measures, and evaluations.

Rowley and Jackson (2011) edited a volume on key concepts of Human Resource Management in which they cite the complexity of the human resource influences within an organization. In the introduction, they claim that "people are the only element with the inherent power to generate value" and seek to label how managing those people elements can make a difference. But they are challenged on the traditional definitions found within human resource management to explore each component further, for example:

- Managing people as resources—what determines that humans are a resource assess?
- Assessment of work—who determines the value of their work and how is it measured over time?
- Rewards and performance—what is the boundary between individual contributions and the collective contribution by all involved?

These types of questions give value to human resources as a strategic partner, whether your organizational environment is centralized or not. Management of the human resource functions is a strategic consideration with all others.

In addition to being a strategic partner the human resource role within the organization can include other diverse interpretations of strategy implementation. Examples include: change catalyst, advisor, employee advocate, process architect, and other roles as needed within an organization to move strategic initiatives forward (Cascio and Boudreau, 2012). The human resource strategy will depend upon the organizational type and needs it develop within the strategic planning process.

Other considerations for human resource involvement or support could include employee relations or negotiation, entrepreneurial ability, job creation; strengthen competitive advantages, upgrade of infrastructure and maintaining compliance with legal and ethical standards (Saridakis and Cooper, 2013). For all of these reasons, whatever form of human resource management your library follows, they should be a partner in your strategic planning process.

# Organizational structures in academic libraries



Organizational structure can be defined in several ways as it relates to how the organization is connected for the most efficient operations. Components and considerations of organization structure are alignment of departments, work flow through the organization, the way in which teams, departments, or individuals are connected, and decision-making authority. These components, and the relationships between individuals and functional units or departments, are charted for ease of use in an organizational chart, which outlines these relationships.

In an academic library, the organization chart typically identifies individuals within their functional work group and how that work group or department is established in a reporting hierarchy. This is also where positions might be distinguished from exempt and nonexempt, or librarians and para-professionals, and other personnel, i.e., temps or grant funding positions might have an organizational impact. The organizational chart can be the strategic starting point for seeing the "big picture" point of view for the organization. The next level of dissemination is at the position level, which should tie into the functional unit or department through individual and collective knowledge, skills, and abilities (KSAs).

## 4.1 KSAs and competencies

While the organizational chart established the reporting lines, the position descriptions describe the purpose and desired functional outcomes for each position. In, *Everyday HR: A Human Resources Handbook for Academic Library Staff*, Munde (2013) a typical example of a library division organization chart is available. Munde goes on to discuss the considerations for the scope and nature of position responsibilities. This includes position competencies related to the KSAs of the individuals in those positions, as well as status and compensation expectations based on standard practices.

Professional organizations, as part of their contribution to that particular profession, will usually create competency standards for through a peer review process which helps benchmarks the expectation for competencies needed within the profession. ALA's competency standards are linked to ALA credited master degree programs and they also support standards created by specialty organizations within the profession. This also includes competency standards created by a profession to demonstrate at the level that the professional must work at in order to meet the output of a particular topic appropriately. Probably, the most common of these would be the Information Literacy Competency Standards for Higher Education that is developed and adopted by ACRL.

The International Federation of Library Associations and Institutions (IFLA) created this for library and information science education programs to provide guidelines and a framework for the educational aspects of the profession so that skills are taught evenly across the world. All of these guidelines and competency standard documents go through periodic review so as to stay current with a changing work environment and to meet the needs of the profession in a dynamic and evolving world of information.

These competencies can provide the basis for analyzing a library's organizational structure and position development. Periodically analyzing how the human resources of an organization are aligned with its mission and expected output can be critical to organizational health and efficiency. This practice is common in the business world but not considered mainstream in academic libraries as of yet.

## 4.2 Job analysis

A human resource activity not typically seen in academic libraries is the job analysis. Conducting a job task analysis can be very beneficial in the strategic planning process as this is an information gathering activity that can provide useful information with regard to current processes and workflows. The factors considered in a job analysis include work methods, organizational or reporting structure, knowledge and skills needed for the responsibilities of the position, and the relationships between individuals or departments.

As it related directly to job functions, data can be collected related to the tasks completed, tools or equipment needed, level of supervision needed or expected, and any physical demands of the job. There are also several methods available for completing a job analysis such as direct observation, keeping a work diary, interviews or questioning, and sampling. In an academic library, the value of this activity can also reduce redundant activities in which the need has changed over time due to the technology advances or changes to user specifications.

Job analysis has a long history in shaping positions and organizations to maximize output and gain efficiencies of practice. All the way back to 1911, scientific methods were used to study workplace techniques in order to establish "best practices" that influenced change from standard or "rule of thumb" methods. Much of this was in the manufacturing sectors and it was recognized over time, that as technology or methods changed, the jobs people were doing needed to be reviewed to ensure that jobs aligned with need.

In more recent history, this analyzing of work and individual jobs became formalized into various forms of formal analysis, typically called a job or job task analysis. Still used in production organizations, the concept has expanded into service organizations, with both private and public sector employers. Even more recently, academic libraries have determined the need for repurposing or realignment of jobs and positions, most commonly as a result of budget cuts and declining financial support. Conducting a purposeful review of positions, functions and responsibilities can be critical in developing a strategic plan to improve how the organization operates.

Benefits of conducting an effective job analysis project, from a total organization perspective (Hawthorne, 2004) include:

- Understanding what position exist and what work is being performed throughout the organization.
- Identifies the KSAs needed for each position, which adds in either performance evaluations
  or recruitment for vacancies.
- Provides data to help target salary inequities or advocate for additional compensation based on comparisons or classification system.
- Creates opportunities to identify training needs within the organization.
- Can help to ensure that health and safety issues are addressed or that special accommodations are made if applicable.

In analyzing jobs and job descriptions, it is important to separate the job from the employee currently in that position. Reviewing the job helps to understands the details of what functions the job is performing for the benefit of the organization and in support of the other positions within the organization. Components of conducting a job analysis include the KSAs mentioned before having the *knowledge* necessary to perform the tasks needed, having the *skills* to perform those tasks adequately, and having the *abilities* or capabilities to perform the job as described.

When analyzing positions with incumbent employees it is important to distinguish between requirements of the position and the performance of the employee that is currently occupying the position. Figure 4.1 is paraphrased from *The SHRM Learning System* (2009), as it might apply to an academic library with regard to information and methods to use for conducting an analysis. It is important to understand why an analysis is useful and to communicate that clearly while performing the activity. And information can be gathered using various methods which can be used in multiple ways.

Many academic libraries have conducted job analysis for the purpose of reallocation of staff. This necessity was forced due to the budget constraints but was needed in order to repurpose existing staff into positions or functions from layoffs or reduction in workforce issues. An example of using job analysis for making strategic decisions with regard to changes dictated by economic shortfalls or technology changes is in an article, *Strategic positions for staff realignment* (Crumpton, 2012). This situation,

Factors to consider	Methods for analysis	Uses of the information
Position purpose, relationship to other positions in work area	Observation	Position descriptions and organizational fit
Responsibilities and activities of people currently in position	Interview	Expectations or performance for position
Knowledge, skills, and abilities that are needed for success	Questionnaires	Training or development needs of individuals in position
Behaviors and performance expectations for individual in position	Dairies and logs	Recruitment specs or career progression/succession planning criteria

**Figure 4.1** Job analysis chart.

prompted by budget cuts and the need to repurpose staff into other areas, utilized four basic steps to make a change: identifying trends and emerging concepts in the field, conducing an analysis of jobs and functions by departments, identifying new skills needed to pursue those trends, and creating performance plans for employees moved into new positions to ensure expectations were met. Figure 4.2 illustrates the thought process to make the change.

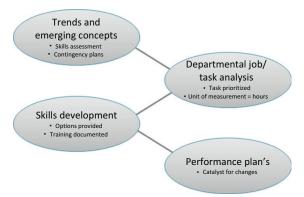
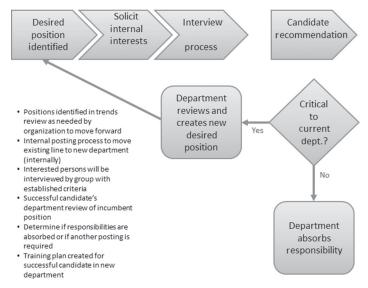


Figure 4.2 Strategic positioning.

This case study proved successful due to the way information was gathered and analyzed before final decisions were made. In terms of acceptance of the changes by affected employees, helping them understand that the change does not add more responsibilities but instead changes functions and responsibilities to areas more critical to the library's success was an important aspect of success (Figure 4.3).



**Figure 4.3** Repurposed position model.

Another example of an academic library's realignment of staff comes from Oregon State University. Nutefall and Chadwell (2012) outline the process that OSU undertook in order to realign the library staff and functions in preparation for user changes and expectations for the 21st century. This was a proactive exercise conducted outside of budget constraints or administrative desires in order to better meet future needs. Their work demonstrates several key components that relates to strategic planning: know where you need to go, communicate at every step, assessment each step to ensure its right, and make sure you are aligning with the larger organization.

## 4.3 Academic liaisons and transforming workforces

One of the more significant changes to occur recently has been with the academic liaison model for professional staff. These changes have important strategic implications based on adding value to the libraries' mission in support of the goals and objectives for the lager institution. Jaguszewski and Williams (2013) outline this significance with their work from ARL, New Roles for New Times: Transforming Liaison Roles in Research Libraries. They outlined the strategic importance of an enhanced liaison model, one that moves from surface utilization of subject knowledge to engaged team builders, working with faculty to solve complex and dynamic problems related to scholar activities and research.

This is where liaisons need to become more adapt at making connections with people and information, keeping in mind that sometimes information is other people. In the Atlas of New Librarianship, Lankes (2011), the librarian is charged with knowledge creation by negotiating, networking, or combining information resources with information seekers. This could be considered that the foundation for the new liaison model as well, librarians who are not experts on everything, but librarians who can match solution with need.

Jaguszewski and Williams further align the change of roles with differences in what users are now doing, such as new methods of teaching and research, with what traditional librarians did of collecting and providing reference and instruction. As the disparity grows wider with this alignment, changes to the liaison model are necessary to be effective problem solvers, thus functional expertise is needed to help make those connections. This trend lends itself to seeking education and experience outside of traditional library science fields as needed.

In the Q&A that followed the webcast version of this report several questions were asked that help further define how these new roles should be considered strategically. For example, the authors had referenced "systems thinking" and were asked to explain that further. "Systems thinking" is about understanding how all of the components in the "big picture" interact with each other, thus liaisons should focus less on processes and legacy services and focus instead connecting elements of the system together in a way that solves the need.

As a follow-up to the work on transforming liaison roles (Jaguszewski and Williams, 2013), the Association of Research Libraries (ARL) invited others to share their stories related to transformations that have taken place in their institutions. Some

examples of shared stories related to changes in the organizational structures of these organizations are as follows:

- The leadership at Oklahoma State University recognized the need to inform library staff of changes that were occurring within the profession so as to better enable their sense of strategic positioning. They designed a Library Future Series (Johnson, 2014) to provide onsite learning opportunities regarding the factors influencing research libraries and the changing nature of the library in higher educational institutions. This format provided an expert speaker to discuss with staff a topic related to the industry, have meaningful discussion and then follow-up with planning activities that produced local changes to strategically reposition the organization.
- Another example at Ohio University, created "communities of practice" interest groups
  from cross-departmental collegial groups (Broughton, 2014). "Communities of Practice"
  are groups formed with people who share common interest or concern about something they
  do and strive to learn how to do it better. Ohio State considered this as a new method for
  workplace learning and saw how this type of interaction can lead to a reformed workplace,
  addressing the trends and topics that are changing the nature of academic library work.
- Finally, at the University of Notre Dame, the Hesburgh Libraries were tasked with developing a new organizational structure that would create new strategic direction and modify the organization after a loss of multiple positions due to a mandatory retirement initiative (Simons, 2014). In developing a change team, the challenge focused on two simple questions: how to make the libraries better for users and how to make the libraries a better place to work? They successfully created a new organizational structure that prioritized new work activities, minimized legacy functions, and provided new opportunities for the remaining staff.

All of these examples demonstrate success at reorganizing the library organization, usually due to perceiving the need for change. Digger deeper, potentially everyone will have their own story at some point in time.

The story in this author's home institution followed a similar strategic path. It was recognized that a change was needed in the liaison model and a task force was formed and charged with investigating and recommending a new organizational model (Cramer et al., 2012). Expectations of subject liaisons had increased due to an increase in the diverse nature of information and resource requests and it was also recognized that some traditional functions were now redundant due to automation.

The task force reviewed the major responsibilities of liaisons: teaching, research support, outreach, collection development, and scholarly communication, and benchmarked with other institutions to determine best practices for making changes. The task force also looked across department lines to review how functionalities had changed with related activities, most specifically collection development. The result became a recommendation, now under implementation, to reorganize into subject specialties in order to gain operational efficiencies with those functional departments.

## 4.4 Organizational development

The adoption of the principles and philosophy behind organizational development has only been embraced by academic libraries in the past 10–20 years. In order for an organization to achieve its strategic goals and objectives efficiently, a culture of

deliberately planned activities should be maintained by all individuals and stakeholders involved. Developing an organization involves research and establishing best practices within the field, so that outcomes and values can be measured and promoted. Thus, organizational development is about driving change with strategic outcomes envisioned and expected.

The key elements of how to approach organizational development were outlined by Sullivan (2004) and listed as: organizational structure, organizational systems, and human resource systems. She advocated for a simple streamline approach to strategic planning that incorporated the appropriate elements into the process. She also felt that future challenges to libraries as a whole would require library leaders to become champions to the transformation of libraries into learning organizations that would constantly repurpose themselves to survive.

Holloway (2004) also recognized the importance of academic libraries engaging in organizational development practices. Regardless of the reasons, academic libraries have grown into large and significant organizations that must operate as such to be treated as such. Libraries that proactively pursue principles of organizational development and strategic planning will have more control over their destinies.

The design of how the organization will look is one of the first and most important considerations. The organizational design is how the organizational structure, processes, reward systems, and other features are implemented to support the institution's strategy and capabilities (Worley and Lawler, 2006). With continuous change it is important to design organizations to expect change. Examples of this can be including expectations of change in job descriptions, job postings, and contracts if applicable. Worley and Lawler (2006) also talk about the "surface area" of an organization, i.e., as many employees as possible interacting with the end user or stakeholders. This broadens the perspective of what the organization needs to do to satisfy those needs.

This requires the human element and recognition of the potential of the individuals who make up the organization. In 2004, *Library Trends* (Vol. 53, No. 1) devoted an entire issue to organizational development and leadership (Stephens and Russell, 2004). The editors of this issue, Denise Stephens and Keith Russell summarized key points from all of the contributors to that issue, as a foundation for process improvement in terms of the changes taking place within organizations. This leads to purposeful development of actions, activities, and processes for driving the organization forward. Their points paraphrased were as follows:

- · library employees are underutilized as resources;
- improvement can be made in how groups produce outputs;
- · organizational structures within libraries can be more efficient;
- · leadership and leadership development is critical;
- · new approaches to managing operations are needed for more empowerment;
- · change can be foreseen and anticipated for better execution; and
- benchmark with other professions to gain perspective on organizational improvements.

This issue of *Library Trends* also contains a great deal of foundational research on organizational development and 10 years later libraries are still faced with the same issues but perhaps under different circumstances. Technology has continued to evolve rapidly and the financial support has deteriorated, which can make organizational process

improvements more critical. Overall, this work helped prepare libraries for some of the challenges faced in the last 10 years, but also informed us for moving forward.

Russell (2008) recognized the need for evidence-based practice as it related to developing a culture of organizational development, to see libraries through the changes to come. Russell completes a through literature review of organizational development in academic libraries and evaluates success with three areas of reason: process, content, and a serendipitous view of how others are approaching the organizational development challenge as well. He also strongly advocates for evidence-based decisions to support changes needed to ensure the sustainability of the organization.

Gathering evidence can take the form of assessment of performance, in which the strategic planning is tested with an assessment of how well changes to staffing, services, resource allocations, and functions, performed against meeting the needs of the larger institution. Especially when making changes to the organization, based on the economic need or changes to leadership, having a series of activities that focus on organizational performance assessment allows for making adjustments to your strategic planning for maximizing results.

Lowry (2005) in an editorial advocating for continuous organizational development, called for total organization leadership so that the library staff recognized that their jobs are ever changing and they are prepared for that realization. He felt that part of the job was to recognize changing environments and change the job to match or sustain the related work or service. This was echoed by Fister (2012), in which she promoted the use of flexible job descriptions and organizational structure in order to make staff more adapt to change.

## 4.5 Organizational culture and performance

Organizations have distinct cultures in which they operate and can create their own society through share valves and behaviors. The functions of an organizational culture can be identified as follows (Sannwald, 2000):

- · provides members of the organization an identity;
- provides framework for organizational commitment;
- · builds a system of social stability; and
- · creates an understanding of what the organization stands for.

Each organization develops and identifies with a shared set of norms, values, and beliefs, originating either from traditions over time or leadership vision accepted by all. Understanding the culture within a library can help you understand what motivates and drives behaviors of library faculty and staff (Martin, 2013). This can become very important when looking to make organizational changes even if the changes are beneficial to everyone involved. If change is not approached or communicated in a manner that is open and appealing to cultural norms or values, resistance to change can be strong, and impedes the progress needed to move forward.

Similarly, organizations are expected to perform at certain levels and be held accountable for fulfilling its mission, goals, and objectives to the larger institution.

Performance is assessed in order to gain a measurement of efficiency, effectiveness, and to determine if goals and objectives are met. Bowlby (2011) ties strategic planning activities to a wide range of examples demonstrating assessment of performance and the dynamics created between them as assessment leads to "tweaking" or restrategizing based on the performance. It is this dynamic that forms the real basis for influencing organizational change as library staffs can see the impact of their actions.

Oltmanns (2004) stresses the importance of determining how the organization if currently performing before embarking on making changes. She referenced the use of LibQUAL+tm, the Balanced Scorecard, and the other formal forms of organizational assessment as well as suggesting outside consultants, internal surveys, and creation of task forces as a method of assessment. Whatever method is used, collecting relevant data will provide the backdrop to identify problem or opportunity areas in which to focus attention for potential change.

## 4.6 Position descriptions are changing

Several studies have been conducted regarding the changes to academic library positions over the years. This is usually analyzed from posting for new positions as older positions are repurposed when vacated or if funding is found to create new from scratch. Figure 4.4 is a combined list of new titles from several sources seen over the last few years.

While many traditional library positions are still advertised, the trend has moved toward positions that include a functional specialty or specialist, if not always in the title, it can be found in a revised position description. Strategically, whenever an opening occurs, or if openings are anticipated, consideration should be given to organizational future needs, not immediately assuming that the need is a traditional replacement.

The University Leadership Council, in their publication *Redefining the Academic Library, Managing the Migration to Digital Information Services*, provides several good example of how positions will change as academic library staff are redeployed. These are described broadly as possible avenues to change:

- Library staffs become embedded and specialized to meet users' needs directly. Traditional services and resource processing are modified to gain efficiencies of scale.
- Collaborations and service redundancies are combined for to take advantage of crowd-sourcing and technology enhancements.
- Consolidation of systems and services across institutions or institutional partners.
- Changing the focus of library instruction to more accurately meet the current needs of students in an online environment.
- Support online learning with online library support.
- · Leveraging online web-based support for high-traffic regular use.
- · Providing multimedia support in a digital environment.
- Provide mobile services that extend the reach of the library.
- Provide for specialty needs for subject matter expertise, data research, and compliance needs.
- Provide academic partnerships that support institutional missions.
- Maximize the unique signature of special collection departments and the digitization opportunities for broadening the institutional experience.

Adult Services Librarian	Librarian for Advanced	Director of Digital Scholarship
Advanced Writing Librarian	Research and Engagement	Digital Records Archivist
Assistant Librarian for Resources & Access Management	Manuscripts Digitization Project Librarian  Metadata Librarian	Digital User Experience Specialist
9	Metadata Librarian	Discovery Systems Librarian
At-Risk Youth Services Outreach & Volunteer Coordinator	Multitype Library Services Coordinator	Digital Initiatives Applications Librarian
Campus Librarian	National Security & U.S. Foreign Relations Librarian	Technology Services Head
Clinical Education Librarian	Programming Librarian	Assistant/Associate University Librarian—Information
Clinical Librarian	Rare Book Librarian	Technology and Digital
Collection Assessment and	Scholarly Communications	
Analysis Librarian	Librarian	Digital Humanities Technology Consultant
Data Systems Librarian	Scientific Data Acquisition	
Digital Access Librarian	Specialist	Director of Scholarly Technology
	Ship's Librarian	
Digital Asset Specialist		Innovation and User
Digital Repositories Librarian	Special Services Librarian	Technology Research Librarian
D:	Systems and Technology	
Director of Innovative Technologies and Library	Librarian	Web Services and Emerging Technologies Librarian
Resource Management	Teen Librarian	
		Head of Web and Emerging
Distance Learning Librarian	User Experience Librarian	Technologies
Electronic Resources Librarian	Virtual Experience Manager	Senior Programmer, Information Management &
Emerging Technologies Librarian	Web and Multimedia Librarian	Systems
Film Librarian	Web Services Librarian	Emerging Technology Services Librarian
	Digital Preservation	56. 11665 2.5. 4.14.1
Graduate Research Librarian	Officer/Librarian	Library Web
Information Access and User Services Librarian	Librarian, Digital Projects	Developer/Designer
Information Technology	Digital Humanities Librarian	Geographic Data Infrastructure Developer
Librarian	Metadata and Digital Resources Librarian	Senior Software and Systems
Instructional Services Librarian		Engineer
International Government	Librarian for Digital Research and Scholarship	Digital Technologies Development Librarian
Documents Librarian	Digital Humanities Technology	Chief Technology Officer
Legal History & Rare Books Librarian	Chair Digital Services and	<b>5</b> ,

Chair, Digital Services and Shared Collections

Figure 4.4 New position titles.

All of these broader statements can, and have, translated into new positions created to foster a new academic library environment that better meets the needs of stakeholders.

These changes will not happen immediately, but gradually over time as technology continues to advance, as user needs change with each graduating class and as faculty themselves find new opportunities in the data and resources available to them. Thus, a strategic viewpoint is necessary to approach these changes in time and opportunity. Lewis (2007), in his paper presented at "Visions of Change" at California State University, recommended that transitions related to these issues be "managed purposefully" and now allowed to drift. Maintaining an ongoing strategic target is important.

#### 4.7 Recruitment of talent

Talent management is an important aspect of the human resource's function in any organization. This falls into two primary strategic categories: identifying and hiring skills and knowledge needed by the organization in order to achieve both long- and short-term goals. Identifying the needs within the organization for gaps in the workforce takes into account organizational visions and objectives for moving the organization forward and not simply filling open positions with similar skill sets.

The other strategic category is to understand the labor market and the impact that supply and demand might have on acquiring needed talent or specific skills. In technology rich positions, individuals with skills, potentially with regard to emerging or new trends, might be harder to find or recruit. Current examples of these types of positions are metadata or research support specialist for organizations who have focused on these areas.

These same strategies apply to both professional positions as well as paraprofessional or support positions. At issue is determining the organizational need by analyzing various components of the current situation. This includes knowing what the organization is doing, what it expects to do in the near future, what the long-term strategy is and how training could influence a search for talent based on the abilities of the current employees. The analysis can be broken down as such, adapted from SHRM's Needs Analysis Process:

- Talent supply—do existing staff have the skills needed or anticipated to be needed?
- Demand analysis—are trends or planned changes possible with current skill sets?
- Budget considerations—will new skills cost more and/or reduce efficiencies?
- Strategic forecast—will investment in training provide better gain than active recruitment?

The current economic climate has produced several examples of organizational restructuring in academic libraries, in order to more closely match existing staff with changing organizational needs, as mentioned previously under job analysis. But once it is determined that the only way that the organization can move forward with new trends, ideas, or strategies, is with new talent, then the search is on for individuals who can fulfill these skills from outside the organization.

## 4.8 Succession planning

A large part of the strategic planning regarding library staff will be succession planning. As it is discussed that organizations will be changing, part of the strategic thought should be centered on organizational capacity going forward. Is the library planning for change and do existing staff have the skills and talents needed for new positions and strategies? Succession planning is also about leadership and ensuring you have people who can take responsibility if needed, as well as being able to fill unique or specialized positions not commonly found within the job market.

Other factors that highlight the importance of having a succession plan program in place can include:

- · an aging workforce or expected retirements in the near future;
- · needing more ethnic diversity to better balance staff with users;
- · changing labor markets including demographics and locations;
- · shortage of needed skills, knowledge, education, or experience; and
- · emerging trends that impact current workforce attributes.

Succession planning also is not just about open positions but also needed skills, so cultivating people who are willing to prepare themselves can make a big difference.

The steps surrounding the development of a succession plan include the following, modified from Singer and Griffith (2010), and put into the context of this book:

- Within the library's strategic plans, incorporate the trends, and direction that impact human resource factors such as needed talent or skills.
- Identify and define what positions are needed or expected to be needed on a time scale of soon or within 5 years, whatever is appropriate.
- Outline the competencies needed for these positions based on future expectations or anticipated needs.
- Assess current skill sets and performance issues.
- · Develop training or development plan for incumbent employees to gain needed skills.
- · Create integration opportunities.
- Assess and adjust plans as needed, create an ongoing cycle of review.

Continuously reviewing the talent pool or competencies of the organization and watching the emerging trends developing in the profession will help to determine what those future needs are going to be. Having a plan to meet those needs will provide consistency and stability to the organization.

## 4.9 Data and statistical help

In addition to library-specific resources such as ALA, other sources of data or statistical information for watching trends or creating organizational structure include:

 CUPA—College and University Professional Association publishes roles, job descriptions, and salary information for professional academic library positions. The job descriptions are more academically focused than O\*NET positions.

- O\*NET—Occupational Information Network is sponsored by the U.S. Department of Labor
  and is the nation's primary source of occupational information. These positions as classified
  provide the basic KSAs needed for each position. It also provides work activities, work context, styles, and values for each position. This can provide basic benchmark information for
  general positions.
- IPEDS—Integrated Postsecondary Education Data System reports library information annually. IPEDS collects full-time and part-time headcounts for three library staff-related classifications from the 2010 Bureau of Labor Statistics (BLS) Standard Occupational Classification (SOC). These classifications include: Librarians (25-4021); Library Technicians (25-4031); and Archivists, Curators, and Museum Technicians (25-4010). The definitions from the 2010 SOC are provided below.
  - 25-4021 Librarians: Administer libraries and perform related library services. Work in a variety of settings, including public libraries, educational institutions, museums, corporations, government agencies, law firms, nonprofit organizations, and healthcare providers. Tasks may include selecting, acquiring, cataloging, classifying, circulating, and maintaining library materials; and furnishing reference, bibliographical, and readers' advisory services. May perform in-depth, strategic research, and synthesize, analyze, edit, and filter information. May set-up or work with databases and information systems to catalog and access information. Illustrative examples: Law Librarian, School Librarian, and Music Librarian.
  - 25-4031 Library Technicians: Assist librarians by helping readers in the use of library catalogs, databases, and indexes to locate books and other materials; and by answering questions that require only brief consultation of standard reference. Compile records; sort and shelve books or other media; remove or repair damaged books or other media; register patrons; and check materials in and out of the circulation process. Replace materials in shelving area (stacks) or files. Include bookmobile drivers who assist with providing services in mobile libraries. Illustrative examples: Library Circulation Technician and Library Acquisitions Technician.
  - 25-4010 Archivists, Curators, and Museum Technicians: This broad occupation includes the following three detailed occupations—25-4011 Archivists, 25-4012 Curators, and 25-4013 Museum Technicians and Conservators.

IPEDS has determined that all three library-related classifications are "noninstructional" personnel although library staff may hold "faculty status." Faculty status includes those personnel tenured or on a tenure track.

## 5

# Emerging trends in academic libraries

Constant change has become a hallmark for academic libraries with the reduction in financial support and the dynamic changes occurring within the higher education environment. This is driven by many factors such as technology and social media, which makes the strategic planning process critical and timely as academic libraries must remain competitive, flexible, and nimble while at the same time being good stewards of the campus mission and institutional knowledge. As trends emerge human resource requirements change which means that the expectations for individuals change as well.

Changes within academic library environments are not new. This changing nature of the work performed in academic libraries has been documented in the literature over the years and in some cases matched to job advertisements as the comparison criteria (Smith and Lynch, 1999). Behavioral skills have also been a consideration especially in recognition of how technology can influence human relationships.

Demographic changes are occurring as well with states shifting support for higher education to more individual support and less institutional allocations. Users' expectations for library resources in academic environments are changing from collections-based needs to needs centered on services or instruction. Population demographics are changing to reflect a stronger focus on vocational education related to available jobs, which creates a decline in support for 4-year liberal arts educational opportunities. The professional literature has many examples, case studies or stories of how change has impacted academic libraries and changes can be different based on priorities and values placed on resources and services by library staffs and their academic counterparts. Figure 5.1 summarizes trends within the profession and shows where we are today between traditional concepts of ourselves and what we think the future will bring.

Within the context of the trends in Figure 5.1, note the underlying changes to the human resources component. For example, with collections, the trend from storing or warehousing materials to having on demand strategies in place, changes the skills needed by library staff working in those areas. Changes to collection development have changed the skills needed by a broad range of staff, from the people actually placing orders and processing, to the librarians who use to serve as bibliographers. The work is not done, largely electronically and more directed by the user, which could change the perception of the skills, from doing to informing (the user).

Since all of these changes, emerging or futurist, involve humans, formulating and adapting strategy becomes a much humanized approach. One of the more popular collective pieces written, speculating on changes and trends to academic library was from the ACRL Research Planning and Review Committee in 2012. This group continually analyzes trends within the profession, higher education, and the broader environment

	Traditional	Emerging	Future
Collections	Accumulate & store	Just-in-time	On demand, anytime
Space	Static, mostly for collections	Flexible, user-focused	Embedded in academic units, collaborative spaces for community
User experience	Prescribed	Interactive	Academic libraries as campus leaders in community engagement
Reference	In person, over the phone	Digital/virtual	Automated, mobile
Users	Students, faculty at their home institution	MOOCs, new majority learners, unaffiliated global learners	Community members
Skills/competencies	Master's of Library Science, subject specialists	Functional, specialized Instructional design	Entrepreneurial blended librarians
Teaching & learning	Assist students and faculty with research assignments, drop-in sessions by request	Embedded in colleges, departments, and courses	Collaborative instructional design
Demonstrating value	Collection size	Expending partnerships on campus, create evidence for invisible services	Learning analytics
Relationships with faculty	Limited, based on needs	Co-creative, joint research projects	Digital scholarship efforts, partnerships with unaffiliated research entrepreneurs

Figure 5.1 Trends.

in order to project and provide for discussion to the larger professional body, data, and information for consideration and discussion.

These trends include changes to resources, technology, and service models as well as overall understanding and perception of the libraries' place in a new higher education environment. One of the trends identified in this report related directly to staffing and the need to strategically approach hiring, training, or repurposing staff for a new environment, which focuses on new technologies, enhanced user expectations, and new challenges to curating scholarly works.

This was followed by the Environmental Scan 2013, published by the same committee from ACRL, which was more comprehensive in reviewing the factors that impact academic libraries. Its purpose was to support planning activities and positioning efforts as it relates to library resources, services, and personnel. A section of the report is devoted to *The Future of the Profession* (ACRL Research Planning and Review Committee, 2013) and leads off with comments from one of the committee members, Brian Matthews regarding the shifts in library jobs. He describes this shift as always being on the lookout for opportunities to serve changing needs related to teaching, learning, service, and research. He expects the future to be ever changing and learning how to anticipate those future needs will better empower the profession to be sustainable.

As change occurs various individual components or methods are created or considered in terms of helping academic libraries maintain their value or find their place in a new higher educational environment. For example, ALA launched a partnership with the Harwood Institute to help organizations "turn outward" to interact with their communities in order to gain better perspective and better align

their work with community trends and strategic goals. Examples are starting to be shared related to this move from "outreach activities" to "engagement" in which the library functions "with" the university community (Kranich et al., 2014). The staffing change impacted here is the liaison model with new or different responsibilities and duties.

The emerging trends of change are not only happening in academic libraries or institutions of higher education but also globally across the world. The SHRM Foundation, in partnership with the Economist Intelligence Unit (EIU) published a report (What's Next: Future Global Trends Affecting Your Organization, Evolution of Work and the Worker, 2014) regarding the changing nature of work. This becomes a recommendation by this human resources professional organization to update practices in order to find the talent needed to serve their organizations. These changes and trends are paraphrased as follows:

- Demographics, the developed world has an aging workforce compared to newly emerging parts of the world that have a much younger population.
- · Large-scale unemployment or underemployment can lead to political and social unrest.
- · Extreme diversity in the workplace and is expanding in multiple ways.
- Higher education standards becoming disconnected to the skills needed by employers.
- Jobs are expanding in the services sector but declining in agricultural and industrial areas.
- · Work is becoming more mobile which broadens availability of talent.
- Automation will erode lower the need for lower skilled workers while specialization will
  increase the need for higher skills, thus leaving the middle diminished.
- · Wages will not keep pace with economic growth.

All of these global trends have implications for academic libraries and the expectations for librarians and paraprofessional staff. Automation and technology has already changed many of the paraprofessional functions in traditional academic library operations, serving users has become increasingly mobile and virtual, wages have been stagnant, and workplaces are changing. All of these factors need to become considerations in establishing a strategic pathway for the future.

## 5.1 Legacy systems

It would seem to be human nature to hang on to things that we like or cherish, or have become routine. Within the business world, this has been recognized as an impediment to change and keeping, or not keeping, legacy services, systems, or routines is typically one of the challenges facing an organization in times of change. Past or present successes also positively reinforce the continuation of activities, but do not guarantee future success by doing the same thing.

The term "planned abandonment" was adopted by management experts such as Peter Drucker, to help organizations understand the need for letting go of legacy services. Mary Evangeliste spoke of this concept at the 2011 ACRL Conference and elaborates in the introduction of an edited volume citing case studies (Evangeliste and Furlong, 2014) within the library environment. The idea is that within the strategic planning activities focused around trends and emerging concepts to pursue, purposeful

planning to end services and activities, that might have had past success, but now do not, would be necessary in order to direct resources appropriately.

Part of recognizing trends and strategically directing the skills and competencies of library staff is to place value on those competencies that best support the institutional mission. This strategy must include helping people recognize the need to change their personal skills inventory by letting go of outdated knowledge and functions in favor or learning new skills and competencies better needed and valued for future work.

## 5.2 Changes in staffing expectations

New jobs, with new titles, and new skills and abilities are needed to move the organization forward as universities adapt to continuous changes in delivering education. Academic libraries, likewise, must adjust to these changes by strategically recognizing the need to change what library staff do and what functions they perform. Anecdotally, there is an increase in the number of new and unique job titles, related to emerging technologies such as, data assets manager, digital initiatives librarian, and digital curator. Examples of other unique titles that appeared included market insights analyst, repository librarian/manager, and impact evaluation specialist. In Chapter 4, a chart of new position titles was provided to demonstrate the variety of jobs becoming available.

Other new functions requiring new skills include activities related to social media and web accessibility, managing digitization initiatives and workflow, and gathering data and analytics. This supports the development of digital research projects and services in academic institutions as well as in other types of research libraries and information agencies. These new functions and position titles appeared in a wide variety of places, particularly in academic institutions, and populate current job postings almost exclusively. Figure 5.2 is a snapshot of a variety of qualifications or requirements for various job postings. The point is to notice the variety of skills sought as these were taken from position postings considered to be mid-level positions, expecting some experience. Understanding this variety is important for individuals to recognize as they create their own career strategies. Some positions are also considered blended as traditional functions still exist, such as reference desk activities, but on a more limited scale.

Recent graduates have emphasized the dual nature of many of their jobs: reference and digital services; adult services and community outreach librarian, for example; they frequently used the term blended to describe this duality. They also focused on the highly collaborative nature of their positions, working across departments, such as with the IT staff and management, and as members of highly complex teams. These recent graduates added the ability to serve as a liaison among the multiple units of an institution to the list of job responsibilities. Even those few who described themselves as solo librarians indicated the necessity of working with other people outside of the library.

Knowledge of information standards and policy

Ability to design solutions that optimize the user experience

Emerging technologies (e.g., traditional and mobile tools, emerging information standards)

Information services (e.g., social media, automation, and information management tools)

Researching and designing engaging information environments

Advocating for and managing selected projects and information

Experience with library space planning, management, and budgeting

Knowledge of current, evolving, and innovative models of collection development and scholarly communication

Strong data analysis skills; proven skills to gather, assess, interpret, and present quantitative and qualitative data for varied audiences

High level of proficiency with Excel, PowerPoint, Access, and other software applications to manage and present data

Demonstrated success in working effectively both independently and within teams

Experience using the acquisition functions of an ILS system to make informed collections-related decisions

Demonstrated skill with oral and written communications, sufficient for public speaking to a variety of audiences

Experience managing complex projects and leading project-oriented teams

Demonstrated effective interpersonal skills to establish and maintain close, productive working relationships with colleagues and library constituencies

Experience working with sensitive or confidential data

Demonstrated organizational skills sufficient to balance multiple priorities, deadlines, and changing project parameters

Evidence of flexibility and initiative when working within a fast-paced, changing environment

Experience with cataloging continuing resources, serials and electronic monographs according to CONSER and BIBCO standards and/or experience with applying the ANSI/NISO Z39.71-2006 Holdings standard

Figure 5.2 Chart of qualifications.

Familiarity with current and emerging metadata standards, and trends, such as MODS, METS, DCMI, and BibFrame and their application for digital collections

Ability to make decisions independently within the framework of departmental and library policies and goals

Ability to train staff and prepare effective training materials and other documentation

Ability to organize and develop information resources for workshops and other types of sessions, including consultations

Experience working with large data sets using common analytic tools and/or statistical software packages

Familiarity with institutional repositories and data repositories (in terms of either retrieval of data/content, or deposit of data/content, or both)

Working knowledge of current library systems and the current trends in academic libraries

Strong organizational and analytical skills

Working knowledge of vendor licensing and an understanding of the negotiation process

Experience in image file formats and digitization methods

Experience in project management and creative problem resolution

Excellent presentation and communication skills, including teaching skills

Experience in open-source technologies, web design and instructional design; ability to write effectively for the web

Experience with a wide array of technologies and programming languages to design, manage, and deliver digital content

Demonstrated strong commitment to diversity, equity, and inclusion in higher education

Evidence of professional scholarly interests and potential to meet promotion and tenure standards in librarianship, research, service, and outreach

Figure 5.2 Continued

A study by Triumph and Beile (2015) reinforces the trend of specialization with librarian positions and emphasizes the increase need for technical skills and digital literacy. Their analysis of academic library positions posted in 2011 and compared to results from 1988 and 1996 studies provides a broad set of data useful in a strategic examination of skills and competencies needed for new organizational needs. Their data also indicate a trend for an educational need, beyond the ALA approved MLS, which does not always satisfy new technologically knowledge and skill requirements.

Hiring strategically means hiring talent with the best knowledge, skills, and abilities to ensure success for the organization as well as the individual. The idea of hiring non-MLS talent is a trend that gaining acceptance in academic libraries. While this practice has been more common in public libraries, the needs of academic libraries are

changing, and the skills needed to serve the parent institutions are expanding into these specialized and more highly integrated areas of academic research and scholarship.

This becomes a debate within the profession that the ALA accredited masters of library science degree is considered the only professional credential for librarians, assuring that these professionals have a consistent mastery of both theory and practice for librarianship. But a study by Simpson (2013) provides a broader view of hiring practices in which other credentials are both needed and accepted by some organizations, in order to fill positions with needed talent. This has other implications related to compensation, faculty, or tenure requirements and accreditation standards. It is mentioned here to add the strategic consideration of planning for organizational human resource needs.

The Competency Index for the Library Field (Gutsche and Hough, 2014), complied by WebJunction for OCLC was updated in 2014 to reflect the changes occurring in libraries from economic, social, and educational factors. These changes or updates evolved from changing needs to: 21st century skills, accountability, and community engagement; all of which impact librarian competencies to serve and meet their users' expectations. Changes to 21st century skill competencies included: communication, collaboration, critical thinking and creativity, self-directed learning and innovation. Technological competencies are now considered a given, always present as part of our society now.

Accountability and community engagement changes to competencies, reflect libraries missions to strategically integrate into their communities and be able to evaluate and justify investments made to their organizations. Librarians and staff need those soft competencies to properly represent and advocate for the economic and social issues present within their communities.

## 5.3 Convergence of skills

Changes within the information and library science profession have required professional positions to have a convergence of skills that can better enable a more complex, dynamic, and expanding role within the home institution. This includes combining specialized areas of traditional functions including the cultural heritage positions with roles in libraries, archives, and museums. Other considerations are:

- Trends in LIS programs that recognize and address the impact of these changes in the earlier stages of development, during the education process.
- How posteducation human resource models are changing to reflect a new professional identity for librarians in whom hard skills are merged with the intelligence to utilize those skills in different ways, based on the current organizational needs.
- And an expectation of how these skills need to have a practical approach and perspective, as
  demonstrated through the problem solving side of applying theoretical knowledge. Research
  work has been conducted that demonstrates a new internship model, tested over the past
  4 years, that helps a student shape their professional identity for selected areas of librarianship, including work in a library archives.

Almost 20 years ago, in an opinion paper by Thomas J. Galvin, the debate over specialization of skills compared to the benefits of collaborative sharing and convergence

of professional skills and duties was just beginning to see the impact of technology to individual jobs and research. Galvin recognized that technology would change the professional's focus from "keeper of content" to "instructor and curator of content and access" and that ultimately there would be a need to first collaborate and then combine processes, skills, methods, and infrastructure. Twenty years later, this debate continues but within a much more technology rich environment that in most cases produces a higher level of financial investment.

A review of literature will be provided for discussion of skills that are learned in a broader fashion, but can be specialized into organizational needs with a multidisciplinary approach to learning, through professional development and enhanced curriculum offerings. Strategic human resource planning can facilitate the convergence of skills needed to transcend traditional concepts among libraries, archives, and museums (LAM). This approach can also address some of the challenges and conflicts regarding philosophical differences between LAM organizations for example.

The world is changing at a rapid pace with significant impact on many professions and lifestyles. Technology is the driver in most cases, to paths of change influencing services, collections and their contents, and the ability to have instance access to knowledge and information. But technology alone does not sustain a profession nor uphold its core values and standards for incumbent employees doing the work of the various organizations. And new professionals entering the field with a defined set of skills may not match up with existing circumstances within the workplace without a flexible understanding of how skills can be utilized in various ways based on need.

Emerging trends of work processes in professional fields must also undergo a convergence of skills, from old to new, from educational theory to practical application, and from individual existing knowledge platforms to shared knowledge using a variety of formats. This convergence has implications across economic and financial concerns, services and user expectation concerns, and the staffing models of the professionals employed in the field, from a human resources strategic point of view.

The focus here is the human resource equation of convergence of skills, both convergence of skills based in a changing environment along with changing needs and the advantages gained and expected within the profession from collaboration between libraries, archives, and museum organizations. As it was identified in 2008 by an OCLC research report (Zorich et al., 2008), successful endeavors will see staff who incorporate collaborative efforts into their work, as well as maintaining the support of administrators who are challenged to find creative solutions to financing and developing their organizations for the future. And it is the collaborative efforts that will ultimate result in a convergence of ideals that are no longer seen as collaborative but instead are a known part of the infrastructure or system(s) of operations.

As emerging trends with technology move in, traditional concepts must be changed and adapted. An example could be archiving born-digital content, which indicates traditional forms of the content are no longer in demand. Erway (2012) advocates for collaboration within the community for software and equipment needed to preserve and protect content in multiple formats. The same could be true for the skills needed to work with multiple formats of material. In this case, a convergence of skills is needed in order to not leave gaps that could lose content.

Another example of where skills are converging is in the creation of digital scholarship centers or labs in which librarians are working with faculty, information technologist and other academic staff to transform research, scholarly communication, and instruction using new media and digital technologies. These centers or labs sometimes exist in the academic library but require the partnership and shared knowledge of other campus departments. Combined these skills provide digital asset management, digital preservation, training, consultations, and tools for digital scholarship. Strategic staff management of these types of campus collaborations will ensure success and credibility of the outcomes.

These trends demonstrate the need for competencies that go broader than traditional librarian competencies and skills. The lines are still flexible as to professional responsibilities related to participation and responsibilities for scholarly output. These initiatives to support teaching and learning are successful but lack resources. But that is changing and looking forward to the needed skills as resources become available will be a positive strategic development.

## 5.4 Professional development to keep up with trends

Within the corridors of the profession, there has been ongoing debate over professional development and what does it take to keep professional credentials credible, up-to-date, and relevant for this vast and changing world. Some professions offer certification on a time-limited basis, which speaks to an individual's qualification to perform a particular job or complete particular tasks. Examples of this could be accountants, or other financial disciplines, computer programming and software developers, automotive mechanics or any other profession or career employment option in which common standards exist and professionals are expected to comply with those standards.

ALA has historically not been involved with the certification of individuals, since the MLS is seen as the professional credential entering the profession. ALA does work closely with accreditation organizations in providing support and standards for those earning the MLS and have begun some certification activities for public librarians and support staff. Both accreditation and certification are voluntary and provide a benchmark of skills and talent, per individual, within the profession.

Academic librarians lack a formal "professional" structure in which to gain new skills and refresh their professional credentials as things change since obtaining their MLS. Likewise support staffs in academic libraries are not required by the profession to complete any particular training or education, other than what is determined by each individual library organization is needed for completion of assigned tasks. Thus the profession creates internal opportunities to share knowledge and experiences through association development, vendor supported activities, and a variety of shared experiences across the profession.

Professional development activities can take many forms. One of the most popular is conference attendance, as professional conferences are formed representing geographic interests, from international, national, state, and local communities, to specialty conferences focusing on specific interests or idealisms. Conference activities

are largely volunteer based, as in organizers, content providers (presentations, posters, and discussion groups), as well as attendees. And the effort put forth in conference activities is not regulated or guaranteed to produce a learning experience.

Hines (2014) in her chapter about professional conferences explores the literature and history of conference activities. From a learning perspective, conference content is not always of high quality and has been assessed by conference goers as not always representing a value. She indicates that a trend in conference activities has been a focus on specialized content and thus the success of specialized conferences on teaching, assessment, or technology-related subjects.

In considering this specialization trend, of both librarian work activities and professional development needs, looking at activities outside of the library profession becomes appropriate and also is gaining appeal. Looking beyond the scope of this profession, librarians can broaden their knowledge base to the benefit of their constituents and users, by engaging professional development outside librarianship (Bradshaw, 2014).

In addition to conferences, other means of professional development activities are being created such as:

- Continuing education—post MLS programs to update skills or provide specialization training.
- MOOCs—being offered for noncredit typically but as a professional refresher.
- Webinars—growing rapidly as a cost effective means to provide updated information and perspective on multiple topics.
- Research—further research collaborations with regard to trends or topical interest in the information field of study.
- Specialization—sometimes vendor driven as technology allows library staff to engage new
  programs and specializations without the larger expanse of conferences or classrooms.
- Social networks—not all of social media is social, much of it takes a professional point of view for sharing information and updating skills.
- *Communication*—from listservs to discussion groups, librarians are communicating stronger about their professional needs and knowledge acquisition.

The trends with professional development have grown to having many options and are becoming specialized to individual needs. But to be the most productive and effective, professional development activities should have a planned strategy with an assessment component to document and produce the data that authenticates that those activities have indeed produced positive results.

## 5.5 How competencies are impacted by changes

If it is agreed that libraries are in a constant state of change, what can be assumed is happening to individual competencies as these changes occur? The organizational goal for a healthy and prosperous organizational work environment is for employees to be confident and productive with behaviors that support the organization's mission and goals. As change occurs, old competencies are devalued and new expectations for talent are created.

According to Markgren and Allen (2013), learning how to make new technologies work for you as an individual is the key to fortifying your career, as well as maintaining a positive work environment. They recommend:

- Embracing the new technology and find a way to make it work for you.
- Be selective in which technologies you pursue, choose ones that are most relevant.
- Consider other users, coworkers, library users, and seek new skills that match or complement their efforts.
- Think of learning new things as a team or total organization, so that everyone's efforts will lead to a bigger big picture.

Remember it is not just about new technology. As mentioned earlier, WebJunction updated their listing of competencies and included in those updates are communication skills, impacting skills related to developing relationships, and networking. Economic considerations might signal the need for all library staff to become advocates for activities related to justifying resources or encouraging donor activity.

#### 5.6 Generational issues

Today's workplaces are not only loaded with a dynamic array of change, it also has a diverse set of workers that represent a broad spectrum of experiences and demographic differences. Some of those differences are generational in nature and should be given consideration in your strategic planning activities. Academic libraries face age diverse issues, not only with library staff but also with users and their expectations of service and interaction. In Chapter 1, there was discussion over knowledge management as a consideration for strategic activities or services governing the knowledge of the institution. Here, we discuss how generational issues are part of a trend that should be part of strategic planning options.

Currently, the four generations that could potentially be both in the workplace and as users are: Traditionalists, Baby Boomers, Generation X and Generation Y or Millennials (Milligan, 2014) with the newest generation just starting to come of age and make an impact, and Generation Z (Frasch, 2014). Figure 5.3 summarizes the attributes of these different generations and what implications recognizing the differences could have on strategic planning.

Generation Z is not on the chart because at this point in time they are still in school or just leaving high school and are not part of the workforce. But many could potentially be future new librarians over the next 10 or so years and could have an influence on the profession. Their attributes as identified by a study coproducted by Millennial Branding and Randstad (Frasch, 2014) are:

- Trending toward preferring money over meaning in the workplace, could this be a result of the tough economic times they are growing up in?
- They want to work more collaboratively, in teams, and have their opinions valued.
- They seem to be trending toward wanting more face time even though they experienced to most technology as children.
- Statistically, the majority of this age group is not in the United States, so cultural diversity will become increasingly important as Generation Z become information users and then potentially professional colleagues.

Generation	Traditionalists, matures	Baby boomers	Generation X	Generation Y, Millennials
Age	62 years or older (born before 1946)	43-61 years old (born between 1946 and 1964	29–42 years old (born between 1965 and 1978)	28 years or younger (born after 1978)
Population size	12%	24%	33%	31%
Total in the workforce	74 million workers	79–78 million workers	46–51 million workers	75 million workers
Work ethic and values	Hard workers	Workaholics	Eliminate the task	Focus on what's next
	Respect authority	Work efficiently	Self-reliance	Ability to multitask
	Sacrifice	Crusading causes	Want structure and direction	Tenacity
	Duty before fun	Personal fulfillment and gratification	Skeptical	Entrepreneurial
	Adhere to rules	Desire quality	Independent	Tolerant
	Consistency	Question authority	Flexible	Goal-oriented
		Team oriented		Confident
		Optimism		
Work is	An obligation	An exciting adventure	A difficult challenge; a contract	A means to the end; fulfillment
Feedback and rewards	No news is good news; satisfaction in a job well done	Don't appreciate it; prefer money and a little recognition	Sorry to interrupt, but how am I doing; freedom is the best reward	Whenever I want it, at the push of a button ;meaningful work
Messages that motivate	Your experience is respected	You are valued and needed	Do it your way; forget the rules	You will work with other bright, creative people
Work and family life	Never the two shall meet	No balance — work to live	Balance	Balance
Change is	A revolution	Managed	Expected	Fluid
Leadership by	Hierarchy	Consensus	Competence	Pulling together

Figure 5.3 Age diversity.

The different categorizations of generations offer stereotypical descriptions of the attributes of each, but in reality these differences become factors in making strategic decisions.

Libraries as workplaces are seeing an increase in age diversity within the profession as older workers postpone retirement and new professionals are placed in professional positions. This raised a variety of issues to consider within any given library, such as workplace conflict, professional development needs, values related to work/life issues, or institutional knowledge management (Munde, 2010). Library management or administrators must recognize these differences in order to strategically account for the needs of all age groups.

Technology has a big impact on how knowledge transfer is accomplished in a workplace as well as the ongoing educational aspect of multigenerations working together. The sharing of knowledge and skills by different age groups is essential for organizational health and to strategically direct activities in relation to this is important. Ways to facilitate organizational knowledge transfer and sharing can include mentoring programs, career path planning, job shadowing or rotation, integrated (by age and experience) project teams, and overall team building events (Milligan, 2014).

## 5.7 How to plan for the future

The future is everybody's baby, hopefully, so strategically a holistic approach should be implemented (Rowley, 2011). Being aware of strategic opportunities throughout

the organization will lead to strategic planning through innovation. Continuous strategic planning requires an innovation component that provides opportunity for the entire organization to participate. Rowley (2011) recognizes that this moves the organization forward beyond having a formal plan.

It is agreed that change in this profession and within academic libraries is constant. So how to plan for change as change is occurring? Many methods or factors can be taken into account and in most cases library leaders use multiple approaches to planning for change (Yi, 2013). Yi recommends that directors and deans look within the details of three specific categories: demographics, human capital, and the variables of the library organization.

With this constant change come opportunities for new initiatives and actions. Sometimes those opportunities are smaller in scope or limited in timing, such as grant activities or special collection projects. Sometimes it might be necessary to create time-limited staffing situations to bring into the organization-specific skills needed or extra talent for a limited duration of time (Stinehelfer and Crumpton, 2010). This can also be a strategic decision and have multiple benefits, such as testing a concept or training staff for future similar initiatives.

Another approach to planning for the future involves the present. In her example from Georgetown University Library, Marhanka (2014) describes how current successes in innovative partnership activities stem from building successful relationships in the past and expects to continue that trend in the future. Not knowing exactly what to expect "down the road," you should always develop your relationships to have successful partnerships when needed. Beth's example is related to technology and research initiatives which create a partnership with information technology at Georgetown. It is an interesting consideration for the future.

## Library and information science education

Library and information science education is also undergoing a transition in order to strategically align the professional education required in libraries, academic and research libraries in particular. Currently, the third "DRAFT" of the revised Standards for Accreditation of Master's Programs in Library and Information Studies (LIS) has been under review and open for comments. These standards were actually adopted in February 2015. These revised standards for accreditation update many of the core elements and needed competencies in a changing professional field. The central connecting policy to the American Library Association (ALA) is stated below.

ALA Policy 56.1 states:

The American Library Association supports the provision of library services by professionally qualified personnel who have been educated in graduate programs within institutions of higher education. It is of vital importance that there be professional education available to meet the social needs and goals of library services. Therefore, the American Library Association supports the development and continuance of high quality graduate programs in library and information studies (LIS) of the quality, scope and availability necessary to prepare individuals in the broad profession of information dissemination.

ALA also has an LIS education and human resources utilization statement of policy. The latest update to this policy already recognizes important changes occurring within the profession. For example, the title of "Specialist" is included to substitute for librarian or library educated positions in which specialized skills are needed beyond traditional library core competencies. Also there is recognition of the contributions made by paraprofessional or support staffs, who has taken on traditional roles and responsibilities originally considered profession work only to be done by degreed librarians.

This flexibility is demonstrated visually in Figure 6.1, which comes from the human resources utilization statement of policy and reflects changes to the needs of the work in the field. Strategically, organizations in the field, such as academic and major research libraries, need expertise and training outside of the LIS disciplines and with improved technologies, many job responsibilities and duties previously accomplished by only librarians are not delegated and performed by paraprofessional support staff.

The final report of the library education task force, delivered in 2009, forecasted many of the changes that were occurring or about to occur within LIS programs and disciplines but also within a professional field that would require a broader mix of

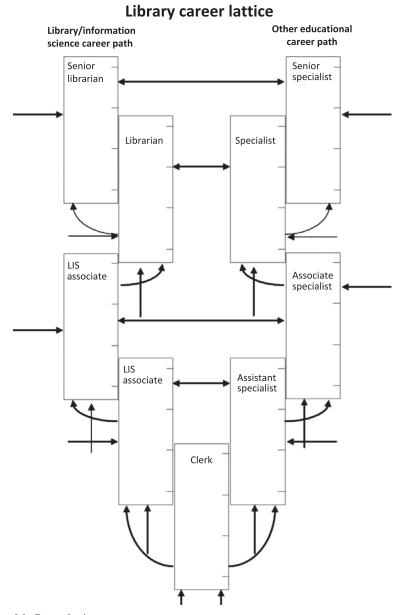


Figure 6.1 Career lattice.

skills and education. Statements such as: "standards should be written using imperatives and in the active voice" and "the standards be stated to be prescriptive, not indicative—mandates not suggestions" give indication that programs needed to be adaptable for the professional need in the market.

#### 6.1 Trends in LIS education

In general, LIS programs are trying to accomplish two things. First, they are teaching the foundational knowledge and theory that information professionals need, in order to understanding and succeed while working in positions that value the education and professional guidelines that are included. This foundation knowledge should also blend with the institutional knowledge depending on the position that any given graduate ultimate obtains.

The other goal that library schools need to accomplish is to provide students the opportunity to master the competencies needed to start their professional career. Most LIS programs provide core competencies listed in subject-specific syllabi or list program learning objectives across the board. And programs typically assess the learning objectives through a thesis requirement, comprehensive exam, portfolio, or capstone project that provides evaluation of skills and competencies learning in the program. Figure 6.2 is a list of student learning objectives evaluated in the capstone project for University of North Carolina at Greensboro (UNCG) graduate candidates.

Core coursework will include most of the competencies required in the program and students usually have a broad array of electives to tailor a graduate program to their interest. This focus on competencies during graduate school helps prepare students for articulating their knowledge to potential employers (Hirsh, 2012). LIS faculty work with employers to identify trends in the workplace in order to tweak the curricula toward the skills needed in a changing market.

As the Masters of Library Science (MLS) is the primary professional credential, how stands the profession as changes modify the need for the MLS to be the primary educational mode of knowledge. As academic librarians become more specialized, the knowledge and

## **Student Learning Objectives**

- SLO 1. The student assesses the philosophy, principles, and ethics of the library and information field.
- SLO 2. The student identifies, evaluates, conducts, and applies current research and thought in library.
- SLO 3. The student applies and values user education principles in the teaching of information literacy.
- SLO 4. The student designs services to meet the information needs of all users and communities.
- SLO 5. The student engages in professional development and service and identifies specializations and related professional organizations as relevant to individual interests.
- SLO 6. The student applies appropriate technology for effective information services.
- SLO 7. The student applies advocacy, marketing, and communication principles for entrepreneurial leadership.
- SLO 8. The student effectively collaborates for the achievement of individual, organizational, professional, and societal goals.
- SLO 9 (School library concentration only). The student promotes reading for learning, personal growth, and enjoyment.

**Figure 6.2** Student learning outcomes.

skills required could very well belong to other disciplines. Cox and Corrall (2013) studied specialties within academic librarian positions to analyze how this is shaping librarianship as it relates to the core foundations of the profession. Specialties studied included:

- · Systems Librarian
- Electronic Resources Librarian
- Digital Librarian
- · Institutional Repository Manager
- · Clinical Librarian
- · Informationist
- Digital Curator/Research Data Manager
- · Teaching Librarian or Information Literacy Educator
- Information and Knowledge Manager

These specialty areas require skills and expertise beyond core foundational curriculum offered by many MLS programs. These trends present a challenge to intermingle LIS principles and theory with tangential subject expertise in order to produce graduates who can assume these roles appropriately.

Knowledge management, mentioned previous, is also a trend that influences academic libraries and should be a consideration in LIS education. Roknuzzaman (2013) identify the importance of knowledge management to academic librarians and suggest that LIS educators take a closer look at incorporating knowledge management principles into the curriculum. They advocate that knowledge management is part of market demand for information professionals and by including knowledge management education in the course of study, this will increase graduates marketability.

## 6.2 Experiential learning

In addition to trends within the workplace influencing library school curricula, the profession has long advocated and provides structure for providing experience for students through practicums and internships. And as job markets are tight the practical experience that a student gains while in school can provide the edge needed when competing for positions in the workplace. Field experience is a trend that has gained momentum within the library and information science education and takes many forms. In addition to practicums and internships, students might gain this experience with graduate-assistance ships, independent study options, service learning activities, research assistance-ships, or volunteer work. Experiential learning opportunities may be paid or unpaid, academic or nonacademic, university-sponsored, or independent.

These options also help students tailor their education to their interest and expected career choices after graduation. Another trend is that these options are also becoming virtual with placement options including chat services and social media marketing activities. Do these experiences matter?

Searing and Walter (2013), from the Graduate School of Library and Information Science at the University of Illinois perspective, assessed the field experience's impact on learning and career attainment. Their research indicates that without a doubt,

field experience makes a difference in how and what the student has learned and how perspective employers view job candidates in attaining their first professional positions. But there is much more work to be done, in terms of strengthening the field experience within the curriculum for maximum benefit.

Hoffmann and Berg (2014) also did a similar study in Canada to determine the relationship between theory and practice in an LIS education. They included a social component in their study that was important in determining how field experiences can help shape the student's professional identity as they move from student to professional. The four themes that emerged from this research included:

- the relationship between theory and practice;
- · the need for field experience outside the classroom;
- · the authenticity of the experience makes a difference; and
- · working with librarians as equals is also significant.

These types of research projects help validate the understanding that this profession must integrate into its education process the types of experiences that will become strategic components to graduates of these programs in the future. The following example of a project defines the learning opportunities for multiple facets of the profession by combining theory and practice within the learning environment.

### 6.3 Real Learning Connections

The Real Learning Connections Project is a joint initiative between the University Libraries (UL) and the LIS Department at the UNCG. This is a new venture which has triangulated the work of a faculty member, a practitioner, and an LIS graduate student, with the goal being to harness the learning power that could be shared among these three in a unique way. These are project-based assignments in which students are paid a stipend but do not receive credit. They work in partnership with a librarian, while sharing feedback with appropriate LIS faculty.

Experiential learning opportunities for students in the Department of Library and Information Studies are work experiences that allow them to sample professional environments in which they might seek a career or which might give them experience that will help prepare them for a career or enhance their current career. From the start, Real Learning Connections projects are seen as a demonstration project that examines a new model of internship based on prior research and focused on the learning objectives of all parties in the relationship (see Figure 6.3).

Projects are chosen by the UL after consulting with LIS faculty members. The expectation is that learning objectives are established for all participants and a tangible product outcome is expected to be produced by the end of the spring semester of the academic year in which the program runs.

The components of the program are as follows:

#### A. Project definition:

a. Projects were identified based on the organizational needs of the UL and will be developed around these needs. Projects should be matched with appropriate courses offered

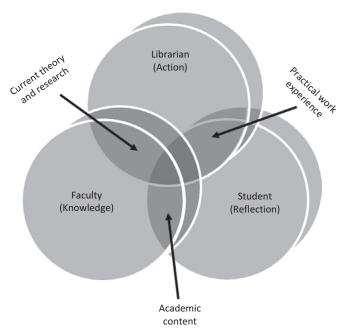


Figure 6.3 Real Learning Connections.

by the LIS Department in both semesters of the next year. All parties are considered equal learning partners. Locus of control and knowledge is shared. Each party has their own goals and learning objectives as well as an understanding of the time commitment involved for collaborative work and communication activities such as monthly meetings.

b. Interaction between all three parties is expected to produce a dialog of different perspectives that will increase the base knowledge of participants. The projects should include some research component that impacts the end product resulting in a variety of tangible outcomes, for example; a coauthored publication/presentation, or an internal report of learning outcomes and achievements.

#### **B.** Roles defined:

Faculty and librarians will be recruited by the administrators and provided expectations of their responsibility to the learning process inherent in the project. Students will be recruited and with the faculty and librarian counterparts a list of learning outcomes will be developed. This group of administrators, faculty, librarians, and students will form the project team.

#### C. Assessing initial training needs:

Relationship building is one key to the success. This should begin with an orientation to the project environment and goals. Depending on the project, all parties may need baseline training in the work of the department host.

#### **D.** Communication process:

The project should include a published schedule of monthly meetings devoted to review the project as well as a review of the status of the learning outcomes. Communication tools will

be agreed upon at beginning of project, i.e., Wiki, Blog, etc., and feedback provided at these monthly meetings as to the quality of the communication.

#### E. Timeline and expectations:

By the end of first 4 weeks of the semester, product and learning outcomes should be specified. Learning outcomes will be specific to each role type and project. Goals and objectives can be tweaked if necessary between semesters based on need or direction influenced as part of the work flow.

#### F. Ongoing assessment activity:

Monthly meetings will be documented. Collaborative sharing of experiences will be encouraged. Reflective practice pieces will be shared. Final assessment will be completed by all parties.

Projects and learning outcomes will be tweaked and refined at the beginning of fall semester and can be adjusted during the year. Students will be paid a stipend beginning with the September payroll, thru April 2014. This equates to approximately 20 h a week devoted to the project. All participants will commit to monthly meetings to debrief project goals and objectives and solicit feedback on progress.

In this year, students will also be assigned to a library working committee related to their project, in order to build relationships and infuse a broader range of perspective into the project. It is expected that the student will communication relevant committee work to their librarian partner.

A general self-evaluation will be executed in late spring to determine success of learning outcomes from personal perspectives, quality of project outcome from the libraries' perspective, and curriculum recommendations from the faculty perspective. Also, at the end of the spring semester, a "completion" meeting will be held in which the students will be asked to present regarding the success and status of their projects and what was learned.

The benefits of this collaborative effort can be found within the product and learning outcomes for all participants and the project itself provides an enhanced opportunity for students to have a solid take away resource or achievement. This type of learning was developed for the following reasons:

- Bridge student work into professional work that will be recognized as such by potential employers.
- Provide a forum for practicing librarians to have an insight into current theory and teaching curricula to refresh skills and professional outlooks.
- Provide a forum for faculty to evaluate curricula standards, materials, and design for use in practical application.
- Move forward a project that is incremental to the libraries' mission and service to the UNCG community by providing librarians a professional partner with academic connections to related activities.

At this writing, the Real Learning Connections Program is in its fifth year and has a proven track record of accomplishment in both learning outcomes and project completion (Bird and Crumpton, 2014). It is felt that programs like this can be expanded to not only provide strategically significant work for the UL, but also provide strategic direction for LIS in preparing the future generation of library and information professionals.

## 6.4 The trends of technology

As technology evolves and changes our individual way of life with new devices, programs, and experiences, the library and information science profession notes its changes on a different type of scale. LIS education was originally and traditionally about training information professionals to work in libraries creating access and understanding to the vast amount of information available. Technology has enabled the trend to move further toward the information science aspect of the profession with digital libraries, institutional repositories, open source software, cloud-based systems, and many other Internet-related activities.

Academic libraries are at a forefront of technology in this age of Google. Students utilize the library in record numbers, what's changed is the way in which they use the library. Almost all students visit the libraries' website even if they never go inside the building itself. Resources are becoming predominately electronic or digital in nature which is driving the change of skills needed by librarians and staff (Chow and Bucknall, 2012). As well as enhancement to their own skills, academic librarians also look for new ways that students learn and conduct research.

Taking a global view of trends within the profession, Ganaie (2013) likens the trend toward the information science side as a natural evolution of the profession based on the changing nature of data and information standards. And while he cautions on the discarding of traditional library components, he recognizes the need for library and information professionals to forecasts needs outside of the industry in order to keep the education of new students current and relevant.

This gives rise to the iSchool movement and its strength despite the years of troubling economic struggles. iSchools promote an interdisciplinary approach to understanding the opportunities and challenges of information management, with a core commitment to concepts like universal access and user-centered organization of information. The field is concerned broadly with questions of design and preservation across information spaces, from digital and virtual spaces such as online communities, social networking, the World Wide Web, and databases to physical spaces such as libraries, museums, collections, and other repositories (ISchool Organization, 2014).

This definition matches what could be considered some of the differences with the iSchools and traditional LIS programs. Each iSchool curriculum is cutting-edge and work-skills intensive (Brynko, 2012). The iSchools work with advisory boards and industry partners to stay current on emerging trends in the industry. They are also very interdisciplinary in working with other departments across campus for an enhanced student experience.

A study by Hu (2013) looking at the 14 best LIS schools in the United States and comparing IT coursework with traditional LIS curriculum, demonstrated a strong move toward a more IT focused overall body of study in these institutions. In her conclusions and recommendations, she is suggesting further strategic design of integrating IT courses and subject matter into the LIS curriculum and cited the advantages for collaborative and shared endeavors between organizations.

## 6.5 The tipping point

In 2014, OCLC released a report to its membership titled *At a Tipping Point: Education, Learning and Libraries*, in which the case is made that a tipping point of change is coming to how we educate librarians and staff for managing themselves as information professionals. This is about educational choices that go beyond tradition methods, but favor convenience and self-directed attributes instead. And this report makes the case for still needing libraries but with a redefined relevance for toward its mission and goals.

This tipping point is elaborated to include an argument for what libraries need to see as changing and how to respond. The forces in education that are changing include empowered customers, who want self-directed options for their education and research needs, new tools and learning platforms that are technology driven, and the financial models that indicate education is too expensive and a change is needed. This is a call for libraries to embrace these forces in order to proactively serve their communities and users. It is also a call for LIS educators to direct the training and education of future librarians accordingly.

## 6.6 Diversity

The last decade has brought about a strong effort to recruit persons of color into the LIS profession. There is a large disparity between the changing demographics of society and the amount of diversity within the profession and LIS programs. Programs like ALA's Spectrum Scholars and IMLS/Laura Bush 21st Century Librarian have contributed to long-term influence in this area (Wu et al., 2010). As diversity of society continues to be a trend, recruitment of diversity into LIS programs is necessary to lessen that gap.

A large component of recruiting and retaining minority MLS students into the profession is role modeling and mentoring. This begins to address the issue of the digital divide, in which computer and Internet resources are not equal across ethnic groups and having less of a gap in minority librarians, per community, will encourage minority library users and thus, use and advocacy of libraries in general (Wu et al., 2010). This should be a long-term strategic consideration in the development of a workforce that mirrors the populations it serves. In an academic library, the same is true due to the recruitment efforts of the university. Academic libraries should be matching those efforts to match workforce with staffing.

Mentorship is common within the LIS profession, especially with new professionals entering the field, but less common with students and practicing professionals. This is one of the successful outcomes of the Real Learning Connections, in providing a more integrated working environment. Mentorship is not only important for specialized needs, such as minority retention, but also for student within a library and information science field of study. Mentors can benefit as well.

The value of mentoring within LIS educational programs was reinforced by a study conducted by Lacy and Copeland (2013). Their conclusions indicated many benefits to students who are involved in both formal and informal mentoring programs. Benefits such as building professional culture and confidence awareness, job seeking skills, and learning actual work expectations, all contribute to a better prepared graduate. Mentors can gain in the relationship as well by being refreshed in the current theory and gaining a better self-awareness and perspective on their work.

Other forms of mentoring or practical learning are currently being explored. Another such program involves peer tutoring, in which peers are working with each other and with other students in different disciplines to develop skills supporting collaborative research and community-based practices (O'Brien et al., 2014). This type of program not only fosters a more skills diverse and well-rounded professional, but also provides the training and perspective needed for learning how to advocate to the community or larger institutions for the LIS profession. By creating a different sense of what an LIS professional is, this can influence student's professional identities in strategically working with their users in different ways.

Leadership is another strategic focus within the LIS education. As a new generation of librarians are graduated the question of continued relevance and advocacy remain strong. New and upcoming leadership is needed to continue to find ways to communicate and define who the profession is and what it means in a rapidly growing information society. Leadership within the LIS educational profession must be looking for students who can define the profession for the challenges ahead (Phillips, 2014).

LIS education must help students learn to move beyond siloization or entrenched positions that do not adequately reflect the changes occurring in the information spectrum. In academic libraries, that means also teaching the relevance of being interspersed with academics conducting research and scholarly works. Part of the strategic charge for LIS education is to provide sustainable insights into the profession as a whole.

Preceding chapters have discussed change within the environment, within higher education and ultimately the profession and how it will remain relevant and/or survive in a new world of enhanced technology with new user perceptions and needs for information resources. The profession needs leadership that can envision how change will impact the dynamics of information sharing, resource discovery, and user interaction. The role of leadership is to influence the human factors present within the organization and leadership has its own set of competencies that can drive individual and thus organizational development forward.

Ammons-Stephens et al. (2009) studied leadership competencies as part of their Emerging Leaders Program for ALA, in 2008. They defined the four central leadership competencies or what they called meta-competencies as:

- cognitive ability;
- vision;
- · interpersonal effectiveness; and
- managerial effectiveness.

Within these four sets of competencies, they also identified 17 broad competencies that create a better understanding of what these competencies mean and how they would be used in a leadership capacity. Strategic planning is listed under managerial effectiveness as is managing change and resource allocation. These are the elements that this book has been concerned with and this is the reinforcement that it takes leadership to move the organization forward. As they offered quotes from library leaders on how leaders must set the tone or vision, inspiring and motivating others, and demonstrating skills with flexible behaviors based on need; they also demonstrated the need for leadership in these turbulent times.

A good example of what leadership needs to consider are areas identified in the NMC Horizon Report: 2014 Library Edition (2014), and these trends will need leadership to carry the profession to the next level. This report examined and reported out on key trends impacting academic and research libraries with regard to key trends, significant challenges, and emerging technologies. The report highlighted two trends as leadership opportunities for future visionary concerns going forward. The first broad opportunity is in how the scholarly record is formatted and dissimulated into the academic community. Traditional models of scholarly output thus, formats for librarians to curate and connect with users, are changing and require staffing skills to embrace new models and formats for the sake of the user.

The same is true of the second leadership opportunity identified by the Horizon Report (2014), that of continual updating of technology, standards and infrastructure, within the library. Continual skill development or education should be an active part

of the academic libraries professional acumen. Recognizing the need for resource allocation toward talent development is an important leadership component that should be part of a strategic plan for any academic library.

#### 7.1 Being the change agent

Cashman (2008) speaks of change as a constant in our lives in which we have no choice but to be part of a changing world and environment. The part of change that does present a choice is adapting and learning to new and ongoing changes. Leaders should demonstrate an increasingly comfortable view of uncertainty and expected change. The better at adapting to challenges related to change, and learning the new skills needed to execute the change, the better someone is at proving leadership to others within the organization or profession.

In early May of 2014, ALA held an invitational summit at the Library of Congress in Washington, DC to discuss the future of libraries. Conversation was inspired by five nationally known speakers from outside the library profession to discuss the challenges that libraries face for the future. Many of the challenges targeted and discussed, included the need for change and revisioning, in order to rebrand what libraries are. This was reflected back onto library staff that will be charged to "think differently" and "respond to user needs openly" in order to safeguard the future. Joan Frye Williams, who documented the summit, indicated that the profession will need to learn to embrace risks, conflicts, and uncertainties in order to grow and move forward.

As the profession changes, leadership strategies must be put into place to support the change process. Change can be painful and to be effective people must be focused and pay attention to what is changing. A tool that can support, not just a change, but a culture of change within the organization, is coaching. An organizational competency that can lead to successful change is to develop an internal coaching program, establishing coaches as expert change agents, per David Rock of Results Coaching System. Rock utilizes a blended learning approach to train coaches within an organization to enable and support people through the changes that need to occur. This is just an example of what should be a proactive approach to driving change.

There can be many approaches to initiating organizational change as addressed by VanDuinkerken and Mosley (2011). They identify organizational change as occurring frequently and often, which means the organization maintains a sense of flexibility or as a last resort, which would indicate when the organization does change it is dramatic and scary. As leadership prepares an organization for change, it must also recognize the organizational culture that has grown up around them. Having a flexible organization that anticipates and accepts change easily will be a larger cultural difference from the organization that resists making the changes as all.

Academic libraries in this time of change need people to lead them who can see not only what is going on but also where it is headed. Riggs (1998) explains visionary leadership and why it is important during period of change. He wrote that "visionary leadership will bring clarity to the library's purpose, a renewed spirit of excitement to the staff's daily work, pride in the quality of service delivered, an environment

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fostering risk taking and a shared sense of progress." As agents of change, leaders need to engage in their visionary skills to add value to the process. Riggs goes on to point out that one of the tools for visionary leadership is strategic planning, as a planned and thoughtful approach to change that instills confidence.

Finally, Riggs fosters an argument for how leadership can keep the organization going as technology drives multiple venues of change. And that is to become a learning organization that is inspired and motivated to learn new things, accept new technologies, and pursue a vision that marries expectations with values.

More recently, in a study conducted by Chow and Rich (2013), the soft skills of having a vision and having empathy for library staff, received the highest marks on the research they conducted. This further reinforces that leadership must coach and mentor people through times of change and those activities should be recognized within the strategic planning process. This research was shared in one of that author's LIS classes and so fosters influence to future leaders of the need for vision and empathy.

Academic libraries have been encouraged and are making strides toward developing assessment programs in order to generate the data needed for future decisions making. Job postings have become common for either assessment-specific positions or positions that include an assessment element in the responsibilities (Passoneau and Erickson, 2013). The goal is to develop a culture of assessment within the profession for organizational improvement.

Business and industry has for many years developed and followed programs for organizational improvement in driving change and also teaching leaders to be change agents. One example, which applies well to academic libraries, is Six Sigma, due to its assessment value. Academic libraries that develop a culture of assessment are also better able to transform data findings into needed redirection of priorities and resources. Six Sigma seeks to improve the quality of processes by identifying and removing the causes of defects or mistakes. In a service environment, such as an academic library, these methods can provide the infrastructure needed to identify and address legacy systems or outdated service models that no longer hold value (Murphy, 2009). As an example of considering different perspectives, it can be an important leadership tool for enlightening the organization.

Another point of reference for making changes that have major impact on organizations and the profession overall is the Guiding Principles by which decisions are made. Library management consultant Raynna Bowlby (librarymanagementconsulting.com) provides some examples of guiding principles for academic libraries:

- · integrate and align with campus needs and priorities;
- · shape around the needs of the user, today and tomorrow;
- · align with the university's and the libraries' strategic plan;
- enable the focus to shift from looking internally to looking externally;
- work collaboratively inside the library and outside the other academic and scholarly partners; and
- enhance our strengths while creating opportunities for new areas of distinction.

Leaders should ensure that these principles, or similarly valued ones, influence the development of strategic planning and/or organizational redesign. This also connects principled professionals, with changes that need to be made.

#### 7.2 Organizational leadership

Many university libraries have developed a list of values that embrace the philosophical point of view in which the University Libraries (UL) operate. These values express a standard to apply in how library staff provides information and services to our constituent community. The following is an example from the author's institution on developing a strategy for organizational leadership.

As administrative and department leaders a list of values was developed in order to inform organizational decisions going forward. These values were developed within a facilitated strategic brainstorming session and were represented of all parts of the organization. They are:

- · innovation and creativity;
- · accountability and excellence in service and programming;
- · a culture of diversity and inclusion;
- · communication that empowers and fosters openness;
- culture of sustainability;
- · collaboration and teamwork; and
- · atmosphere of continual learning.

A list of priorities is also updated each year, as it relates to the prioritization of resources and efforts that have the greatest impact on our organization in service to the university and surrounding community. Combined in Figure 7.1, these values and priorities constitute what should be considered a strategic organizational purpose to serve our campus and realize an impact on student success.

	Organizational values						
Library priorities	Collaboration and teamwork	Accountability and excellence in service and programming	Communication that empowers and fosters openness	Innovation and creativity	Culture of sustainability	Atmosphere of continual learning	A culture of diversity and inclusion
Create a data driven strategic plan for collections		×			х		
Collaborate with partners to continue developing effective learning spaces	х	x				×	
Support continuous learning and professional development for all Libraries' staff			х	x	х	×	
Establish budget priorities and manage them effectively		x			х		
Foster a culture of grant and donor development	x		х	×			х
Increase advocacy of scholarly communication and open access on campus	×	×	х		х	×	
Support a culture of staff recognition and appreciation	х		х			x	х
Create a startegic plan to lead the Libraries' diversity initiatives	×	×	х				×
Craft a sustainable computing environment	х	х			x		
Develop the Libraries as creators and publishers of content	х			×	х		
Support student learning through information literacy instruction and faculty collaboration	х	x		×		×	
Emphasize WMS updating, training, creative solutions and product improvement	х		х	х		×	
Develop and grow research support services	х	×	х	×			
Expand the growth of born digital initiatives		×	х	х	х		
Produce strategies that communicate the value of the Libraries	х	×	х	×			х
Continue implementation of the new liaison model	х	×	х	×			

Figure 7.1 Priorities and values.

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Library faculty serves as the professional leaders to drive the ethical practice of fulfilling our mission for the libraries as an organization. To that end, a conversation on organizational leadership would provide the following benefits and outcomes:

- Recognition of the influence that all professionals have in representing the UL to campus, community, and other library staff.
- · Assessing and framing the librarians' role as responsible leaders.
- Develop an awareness that behavioral attributes impact all levels of communication between employees, students, and faculty.
- Provide a framework for sharing as a professional critic (peer review) in a nonthreatening manner for the greater good of the organization.
- Help professionals embrace the responsibility of providing proper responses and actions that can
  impact organizational motivation while also being accountable for positively influencing others.
- Demonstrate shared value in collaborative leadership during challenging times.

These outcomes could be the beginning of further discussions related to developing positive outcomes with leadership responses for the challenges we currently face.

The roles of the assistant/associate deans are important as well. In pop culture, the role of "second in charge" or the assistant/associate that supports top leadership, or takes control in the absence of the top leader, can play a critical role in the development of the story. An example is Mr. Spock, playing second in command to Captain Kirk in the original Star Trek episodes. This "second in charge" can also provide depth and complexity to the story, sometimes developing a story of their own. And an important element within those roles of leader and "second" is the consistency with which they operate and the relations they form between each other, as a face to the larger organization or unit, within the action.

Likewise in business organizations, multiple models exist that demonstrate how the organizational structure can be built around the authoritative structure in order to maintain consistency, efficiency, and longevity of the larger organization. This includes models for the succession planning and the development of junior executives and managers who could take the primary leadership role at some point in the future. The role of associates and assistants are meant to extend the influence of the primary administrator and at the same time provide opportunities for personal growth and career advancement.

As academic libraries have grown over the years and developed into more complex and multifunctional organizations, the role of the University Librarian, Dean, or Director has also evolved into the type of position that needs a higher level of support and a longer reach into the internal operations of the library(s) organization and an enhanced view of outreach and community-based activities as part of organizational sustainability. This places more importance on the role and functions of assistant and association deans or directors (referred for remainder as AULs), be they singular or multiple within the organization. And as with fictional roles created in pop culture and business models that carry a heavy financial component to stakeholders, the dichotomy between the UL and the AUL is critical for the health of the library as it serves the larger academic community.

Sometimes, the system works perfectly with the AUL trained and prepped to succeed the Dean/Director when the opportunity occurs. In an interview with Eric C.

Shoaf, published by Library Leadership & Management in 2005, Florence Doksansky, who became acting director of Brown University's library after 21 years as an AUL, shared some insights as to how being an AUL prepared her for greater responsibility (Shoaf, 2005). And she also credited her former director for allowing her to stand in as needed in order to gain the broader perspective to become the final authority, within the library organization. This example also demonstrates the importance of the relationship between the AUL and their Dean and how the senior manager's investment in developing their subordinate can be healthy for the organization as well.

Organizational responsibility is a consideration as well. In Simon's Administrative Behavior (1976), he analyses the decision-making process in administrative organizations. He contends that organizational behavior is a complex network of decisional processes which all point to the influence that the behaviors have on those performing the tasks associated with the operation. Which means that the physiology of the organization is driven by the influences those decisions have over members of the organization.

AULs are both decision makers and decision supporters of the Dean/Directors and the behaviors exhibited should reflex individual points of view but also collective agreement or support to the face of the total organization. This is especially true with organizational development activities such as strategic planning, training and development of staff, managing change, and restructuring activities. This also bears relationship to the type of organizational structure used as it applies to the chain of command.

The historic viewpoint of the chain of command principle, as developed by Fayol (1949), implies a line of authority were each subordinate reports to only one supervisor, up the line. In this rapidly changing environment, many organizations including libraries have flatter hierarchies and communication lines and supervision becomes a matrix across the organization. This can put the relationship between an AUL and the Dean/Director at a different level, one of understanding and communicating with each other through shared visions and perspectives.

Relationships and roles are important for the AUL who aspires to become a Dean/Director, of to simply have a greater influence within the organization, the relationship that they build with the boss is critical. In her book, *Being the Boss* (2011), Carmen Nobel addresses the issue of developing those relationships. She says that it is common to let the person up the chain of command take responsibility for relationship development. But, she says, each individual is equally responsible for managing that relationship with their boss. AULs must cultivate their relationships and look for triggers or sources of power to have influence with their Deans and Directors to maintain their status within the organization.

#### 7.3 Succession planning

Succession planning is an ongoing process of identifying and developing future leaders in an organization so as to maintain consistent leadership as leadership changes (Calareso, 2013). While this is a common activity in business and industry, it is not so prevalent in higher education but it is important all the same. What is significant about

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succession planning is that it is intentional and strategized, not random or by circumstance. This effective transition of leadership can maintain the mission and values of the organization, while promoting trust and loyalty with the organization's staff.

Successful succession planning will create a set of guidelines and processes for the organization to follow for internal and external needs (Calareso, 2013). By assessing internal candidates early, additional training and development can be engaged in order to provide the desired skills needed when the time comes. Assessing organizational needs provides the framework for searches when vacancies occur and candidate profiles need to be developed.

Academic library organizations, such as ALA and ACRL have identified the need for succession planning to be a key issue facing academic libraries of the future (Galbraith et al., 2012). But research indicates that although the need for succession planning is understood, implementing and engaging in succession planning practices are not yet occurring on a large scale. This need is amplified by the aging senior administrator population that could potentially leave a vacuum in academic library leadership.

Steps and considerations are outlined in Figure 7.2.

This is a rough overview of the process and whatever plan is developed it needs to be tailored to the specific organization and organizational need. Other considerations in the planning process should include:

- · timing and readiness of candidates;
- plans for alternative situations or needs; and
- assessment criteria for determining success.

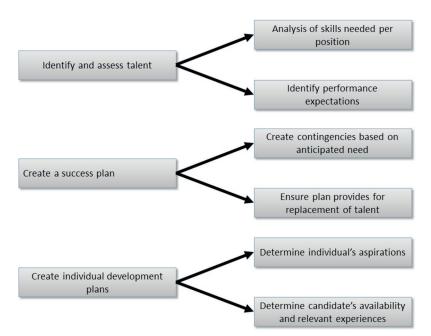


Figure 7.2 Succession planning.

Institutions of higher education must prepare today's students with the knowledge and skills needed to survive in a world that will continue to evolve and change as society progresses. To do this, these institutions of higher education need to recruit and develop the talent needed by staff and faculty to move education forward in a productive way. This includes the academic libraries and library staff who can have considerable influence on a student's education and the research activities of faculty.

Talent management is executing a set of processes and programs sanctioned by the organizational cultural norms, to attract and develop the knowledge, skills, and abilities of those employed by the institution. This of course requires a solid organizational commitment to do so but sometimes higher education lags behind the public sector in this management of talent. This is identified by Evans and Chun (2012) who found little formal programming that supports strategic talent management on the part of universities.

Academic libraries are much in a similar situation as discovered by the research conducted for an ARL Spec Kit (#344). This was stated as academic libraries did not deploy a systematic approach to initiating a talent management strategy (Taylor and Lee, 2014). The data from their assessment support the premise that libraries are conducting or supporting professional development activities or executing performance measures, but they lacked building a comprehensive program aimed at identifying talent needs, and developing the strategy to obtain those needs for the organization.

This is not complementary to other data which indicates widening gaps of skills within the libraries' workforce, as skills needed are not trainable or available.

#### 7.4 Organizational learning

Many sources indicate that organizations who establish strategic directions based on the organization's ability to learn and adapt to change will move forward with the least resistance. Organizational learning can be defined as changes within the organization that occur as the organization acquires experience (Argote and Miron-Spektor, 2011). Organizational learning can be the process of developing and sharing knowledge within an organization. Academic libraries are the hub within which institutions of higher education operate and can offer the perfect opportunity to provide the forum for sharing knowledge. An organization improves over time as it gains experience and is able to create knowledge. This knowledge can be broad, but relevant nevertheless. This knowledge can be created at four different levels: individual, group, organizational, and interdisciplinary. An organization that learns and shares this knowledge allows the organization to stay competitive in an ever-changing environment. It is a process of improvement that can increase efficiency, accuracy, or relevancy to stakeholders and funding sources.

Academic libraries are in a position of not only learning and creating knowledge to identify its strategic directions but also to influence knowledge within the larger campus or university environment for strategic considerations on a larger scale. Organizational learning and thus the complexity and diversity by which it is fostered, can influence the organization's ability to be innovative and respond to unknown

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elements that result in scholarly and creative activities (Jantz, 2012). This becomes part of a strategic leadership vision for the organization.

#### 7.5 Be the leader

Strategic change requires leadership that must first recognize the need for change, based on the assessment and evidence from information garnered for consideration. Leadership is different from management; management focusing on the complex details of practice and procedures, while leadership focuses on coping with change (Kotter, 1990). If you are the leader involving strategic planning activities, especially those affecting human resource elements of the organization, you must "be the leader." In addition to coping with change, leadership expert John Kotter emphasizes other points or expectations of the leader, namely setting direction, providing motivation, and aligning people (Kotter, 1990). This alignment of people is about finding the right people to carry forward the vision needed for organizational change.

A significant part of being the leaders is about the relationship that leaders have with their staffs. Leaders must have a solid ethical base in order to cultivate and motivate the efforts that will be needed by staff in times of change. And social learning theory experts agree that ethical behaviors by organizational leadership influence others as well as help the organization succeed in its strategic endeavors (Crumpton, 2012a).

Steven Bell warns of the dark side for academic library administrators (Bell, 2013) but makes the case that higher education needs administrators who are also effective leaders in promoting the organization, motivating library staffs, and moving the organization forward in respect to changing needs. Leadership needs to engage the employees of the organization in order to make change successful.

The literature on management and leadership is full of programs and strategies for improving management skills or developing leadership influences. A simple view provided from Brown (2014), an HR consultant applies to our need for leadership engagement. She outlines seven leadership strategies that are effective in improving staff engagement. They are:

- cultivate high trust (or ethics);
- model core values (or guiding principles);
- · encourage debate and risk taking;
- · listen, really listen;
- · leverage strengths and mitigate weaknesses;
- · be savvy about organizational nuances (culture); and
- image the future (provide the vision).

All of this includes understanding and using the language that connects people and is clearly understood. Especially in reorganizations or changes that impact staff member's primary job responsibilities, information must be interpreted, and understood accurately by each person and how they are affected in their own situation. This is a leadership responsibility that affects the outcome and motivations of each person within the organization (Staninger, 2014).

Another leadership issue to consider is how other layers of managers, supervisors, and formal leaders support the vision and leadership of senior administrators. Within the organization's hierarchical structure, the layers between front line supervision and dean or director must fully understand and accept what needs to be accomplished in a change scenario. Library staffs, who are being asked to develop new skills and abilities, while learning new knowledge, must have the support of their supervisors, who support the change through the chain of command (Crumpton, 2013). Good leadership practices will teach and support all levels of supervision in proper coaching and mentoring aspects for understanding and ultimately embracing change.

This idea of "being the leader" comes with loftier ambitions as it related to the professional as a whole. A study of Canadian research libraries examined the human resource aspects of change, the challenges and opportunities currently being addressed, and concluded that transforming skills and abilities of library staff to be the upmost challenge that they were facing at that time (Williamson, 2008). Their research included considerations for U.S. libraries in the same situations. An interesting point was made in this study about leadership in the entirety of the profession. Leaders within the profession must continue to work together to change attitudes and ideals in order to move us forward together rather than my happenstance or local circumstances.

Effective leadership is clearly essential to senior-level administrators in a 21st century academic library environment (DeLong et al., 2012). Leadership soft skills are increasingly the focus in the development and recruitment of deans, directors, AULs, and department heads. The traditional approach to filling senior positions, promotion from within, is changing to better bring leadership experience into organizations in order to foster change.

With new leadership focuses on library leadership, considering the impact of hiring academic library leadership has grown in importance. Searching for any academic leader is critical for higher education, but understanding librarianship and the leadership needs for the library specifically can be a bigger challenge (Buschman, 2013). Issues such as finding talent in itself can be difficult, understanding that bad choices can have a negative rippled impact, and recognizing the financial investment for paying for leadership, all are factors to consider.

Part of developing this leadership component will be to find leaders that can maintain credibility in the face of addressing adverse concepts or situations that could create conflict (Society for Human Resource Management, U.S., 2006). Credibility is important for gaining the trust of those who will be the most impacted by strategic change. Whether this is senior library leaders or human resource professionals, involved in the process, maintaining trust, and understanding is essential to success. Library leadership must recognize and be a partner with the human resources affiliates on campus, whether that is in-house or within a centralized campus department. The human resources value is to assist in the strategic planning process while maintaining guidelines and principles related to labor laws and institutional integrity (Holbeche, 2010).

Human resources will also help to maintain the validity of changes. Validity refers to the appropriateness, meaningfulness, and usefulness of positions and matching staff to the requirements of those positions (Kleiman, 2010). In order words are decisions

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being made outside the reasonable abilities and standards provided? Human resources will create and follow uniform guidelines for ensuring fair processes and outcomes.

According to the American Management Association (AMA, 2007), organizations do not typically build execution focused leadership capabilities or use succession planning to develop leaders who are good at strategy execution. However, higher-performing organizations use these practices to a higher degree than their lower-performing counterparts and academic libraries have an opportunity to foresee the need for a different kind of leadership. Different leadership styles exist throughout the profession. As organizations engaging in purposeful change, a review of the leadership competencies needed beforehand might be appropriate (Duren, 2012).

To be a leader within the academic library world of today and tomorrow, special skills and insights will be needed that combine respect for core values of the libraries' impact on stakeholders (Nitecki and Abels, 2013) with the vision and influence (de Stricker, 2014) expected to navigate libraries and their staffs into new challenges. It will also take communication skills to provide clear direction for all communities or interest, as well as ambition and synergy to engage stakeholders with community (Roberts and Wood, 2012). And it will take imploring an organizational culture that gives identity, commitment, and social stability to the organization as a whole, while nurturing organization relationships for collaborative strength (Shepstone and Currie, 2008).

#### Conclusion

The fun house is typically found in the amusement park along the midways and patrons are expected to engage and actively interact with various devices designed to surprise, challenge, and amuse the visitor. Funhouses are participatory attractions, where visitors enter and move around under their own power. Including aspects of a playful obstacle course, such as the "barrel of fun" which is intended to distort conventional perceptions and startle people with unpredictable circumstances within an atmosphere of wacky whimsicality. Likewise, in drawing a comparison of the fun house as the larger institution and the "barrel of fun" as navigating through the human resource concerns of your organization you can see how conventional wisdom does not always work as things are changing. The best way to get through, not only the fun house but also especially the "barrel of fun" is to have a plan, that can demonstrate flexibility and strategic purpose.

Library leadership representing the profession, have issued many proposals or predictions as to the trend and the expectations of the future of libraries, in some cases academic libraries in particular. Libraries are moving from a purchasing role to a curation role and directing resources, primarily space, money, and staffing, away from legacy collections and services, and toward more user-focused activities (Long and Schonfeld, 2010). Thus, the need for strategic planning is great and should be embraced with enthusiasm and respect.

To be strategic, it is to alter a path of normal flow to make a purposeful change. In business, this can mean to alter processes or methods of manufacturing, distribution and marketing, and any number of functions or activities. This changes things, such as how you manage them or what the outcomes could be or how it impacts other items? The planning aspect becomes defining those strategies, giving direction, and making decisions on where you want this strategy to take the organization. With human resource considerations, strategies can change what you expect of your people, who you hire going forward, how you guide them, and what can be achieved with a strategically directed staff?

Changes are occurring rapidly to the competency needs of librarians as society moves into an increasingly digital world. Examples of the impact on hiring needs can be seen in studies conducted in a variety of venues. Within academic libraries, some studies indicate that additional nontraditional education is needed by practicing librarians or current LIS students to obtain the skills they will need going forward (Tzoc and Millard, 2011). Other studies incorporate the behavioral skills needed that will be required in developing the types of relationships needed in a digital environment (Marion, 2001).

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The Education Advisory Board is a division of The Advisory Board Company, based in Washington, DC. They provide best practices research to a membership of more than 2700 of the world's leading hospitals, health systems, academic medical centers, universities, and colleges. In 2011, they addressed the topic of redefining the academic library (University Leadership Council, 2011) and issued a detail report of lessons learned. Their research indicated a call for redeployment of library staff and a push for library leadership to recognize the need to change.

All of the studies, surveys, reports, and conference proceedings currently in the professional literature, provide useful data for any academic library organization to start or supplement a strategic planning process for the changing human resource needs we are currently experiencing. McInnes (2011) studied strategic planning at a national level and formatted these conclusions:

- Developing collaborative working relationships among organizations avoids addressing new skills and needs in isolation.
- She stressed the importance of engagement for making change positive.
- It's importance to develop a culture of innovation and learning.
- Leadership must be committed, engaged, and motivated leadership to make things work.

Good examples are already out there, where academic libraries have successfully created and implemented strategic, organization altering, and changes. The University of North Texas Libraries (Halbert et al., 2010) completed an organizational restructuring that focused on top level realignment while also more closely engaging in campus priorities. In Canada, Queen's University restructured, guided by their core values and already established strengths (Library Change Steering Group, 2010).

Other considerations related to organizational strategic planning relate to the engagement of the staff so that ownership of the change becomes part of the process. This was the case at UC San Diego, which produced a bottom-up approach to making change. Their recommendations included a lesson on communication; it can never be too much (Williams et al., 2014). And considering the how diversity will be a part of your future can make a difference. Incorporating diverse strategies and planning is important as well as pursuing these practices daily (Kreitz, 2008).

This book has been about planning for change, which is already occurring and will continue to evolve. Academic libraries as a component of higher education institutions have to reinvent their role in the university. Recognizing the need to be strategically intelligent and aware of these changes constitutes a tremendous endeavor and should not be taken lightly. Likewise, understanding and learning how strategic planning works will make a difference in the longevity of the institution.

The human resource factors of an organization can be the most critical, as this is about people, the people who work for the institution, and produce the outcomes needed. As those needed outcomes change, so needs to the skills, knowledge, and abilities of those employed and connected. In an academic library environment, the profession has documented numerous changes that redirect what people do. This is not only for library staff but also stakeholders, vendors, and community members. Human resource issues, such as training and development, leadership skills, job analysis, and hiring practices, all must be part of a strategic initiative to move forward.

Conclusion 83

Trends within higher education, academic libraries and library and information science education, are not only occurring now, but in some cases occurring faster and faster. How skills are converging, how LIS students are educated, and how leaders can guide us through these trends and changes, will determine the future of the profession.

Librarianship has been and is changing, as you read this. Librarians who were always considered to person who could find the answers are now expected to fulfill even loftier expectations. They must be knowledgeable on web-based applications and resources, familiar with cloud and digital information services, and how to solve problems in an increasingly complex society. Their duties will include information on curation, resource access and management, along with skills related to research and business competitive services. They will be expected to work in teams, have project management and budgeting skills, and be somewhat an expert in the field or discipline that they are working with. How is this challenge to the human resources and talent factors of the organization accomplished? Your path to creating successful and productive library staff in higher education institutions is through a conscious effort of strategic human resource planning for academic libraries.

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### **Abbreviations**

**ACRL** Association for College and Research Libraries

**ALA** American Libraries Association

ANSI American National Standards Institute
ARL Association of Research Libraries
AUL Assistant/Associate University Librarian
CNI Coalition of Networked Information

**CUPA** College and University Professional Association

**EIU** Economist Intelligence Unit

IFLA International Federation of Library Associations and Institutions

IMLS Institute of Museum and Library Services
 IOS International Organization for Standardization
 IPEDS Integrated Postsecondary Education Data System

**KM** knowledge management

**LAM** Libraries, Archives, and Museums

MLS Masters of Library ScienceMOOCs Massive Open Online Courses

OCLC Online Computer Library Center, Inc.

O\*NET Occupational Information Network (sponsored by U.S. Department of Labor)

**PDA** patron driven acquisitions

PHESS Professionals in Higher Education Salary Survey

**ROI** return on investment

SCUP Society for College and University Planning SHRM Society of Human Resources Management

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