

# The Future is Now: Responses to the 8Rs Canadian Library Human Resources Study

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Foreword by Ernie Ingles



CANADIAN LIBRARY HUMAN RESOURCE STUDY  
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LES BIBLIOTHÈQUES CANADIENNES

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## Foreword

It brings me great pleasure to see this collection of papers come to fruition. As Chair of the 8Rs Research Team, I worked with an energetic and diverse group of colleagues who collectively pushed our research questions to the limit—and then some. The collaborative nature of this project ensured that each member of this team could voice their professional viewpoints on the design, methods, and findings, resulting in a much-strengthened research output than one simply written by one or two individuals.

This collaboration did not begin and end solely with the Research Team, however. From the early days of this project, as our conversations became more far-reaching with respect to increasingly nuanced aspects of the library human resources picture, we could see the need for high levels of professional community involvement from across the nation. Much of my own contribution to this project at that time was informing colleagues across Canada of the potential impact of such a study—if we could rally the resources and participation from as many institutions, associations, and groups as possible.

And what a level of participation! Thousands of individuals completed surveys about their own careers and about the practices of their organizations, providing a resulting dataset far richer than anything we have previously had been able to analyze. Institutions provided financial resources, and associations served to partner in the pursuit of funding from government agencies, as well as providing far-reaching support in terms of the publicization of the study. I would like to express particular gratitude to these groups:

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- Canadian Health Libraries Association
- Health Libraries Association of British Columbia
- Greater Edmonton Library Association
- Prince Edward Island Professional Librarians' Association

I thank the authors whose thoughtful analyses provide readers with greater insights into the implications of the 8Rs data. And, I would like to thank co-editors Kathleen De Long and Allison Sivak, for seeing this project to fruition.

Ernie Ingles  
Vice-Provost & Chief Librarian  
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## Introduction

This collection of papers represents an exciting response to the 8Rs Canadian Library Human Resources Study. When the 8Rs Research Team began our early discussions about the Association of Research Libraries (ARL) studies conducted by Stanley Wilder (DATE) and their implications for the University of Alberta (UA) Libraries as an individual institution, we could not have predicted that our conversations would result in a national study just a few years later. But the study was, I believe, spurred on by several factors.

One was the general lack of research available on the aging workforce, beyond Wilder's (DATE) seminal work for ARL. In our early reviews, we found little information beyond anecdote and opinion in the literature. Most of these opinion works focused primarily on the United States, a country that shares some of the same concerns as the library workforce in Canada, but with some important differences. We believed that some of these differences were visible in the smaller numbers of Canadian LIS programs and students, as well as in the smaller numbers of libraries and other employers for MLIS graduates.

Another factor in the development of this study was the track record of the administration of the University of Alberta Libraries to think on a grander scale than the local. As a research library that has served as a leader within the Canadian community with respect to innovative partnerships and the development of consortia, the University of Alberta Libraries has continuously understood our own work within the context of larger communities. This way of understanding context, then, influenced our growing vision of what this research could become.

Lastly, the diverse membership of our research team brought a variety of perspectives, ideas, and understandings to our discussions. Our committee was begun by when we began included Kathleen De Long and Ernie Ingles, two administrative librarians with much experience in the field; Chuck Humphrey, the coordinator of the UA Data Library with expertise in statistical interpretation and data sources; and Dr. Marianne Sorensen, a methodologist whose post-doctoral work had included public library satisfaction surveys and provincial labour force analysis. Supporting the committee were Jennifer (De Peuter) Chick, a methodologist with a background in Sociology, and Allison Sivak, then a student in the School of Library and Information Studies (SLIS) at UA. As we continued our work, we were joined by Dr. Alvin Schrader, at that time a professor at SLIS; Gerry Meek, Director of Calgary Public Library and representative of the Canadian Urban Libraries Council (formerly the Canadian Association of Large Urban Public Libraries); and William Curran, then Chief Librarian of Concordia University and representative from the Canadian Association of Research Libraries.

As we began to read and discuss the literature on the question of retirements and recruitment, we developed our research questions from a simple supply-demand issue, to understanding the many factors that impact a workforce over generations. Our questions shifted from a birds'-eye-view of the library field in Canada towards a more subtle, interconnected web of understanding of what influences changes in a workforce. These issues included those of career progression, leadership and management, salaries in the profession, diversity of the workforce, and education and continuing professional development.

Early focus groups with directors of large academic and research libraries and large urban public libraries confirmed that these were issues on the minds of directors. These focus groups also reminded our research team that libraries do not exist in a vacuum, but exist to serve individuals living in cities and towns, those working in various non-profit and corporate sectors, and attending academic institutions. Larger trends in Canadian society would clearly have an impact on the kinds of professional competencies required by libraries in future; these trends include the demographic profile of Canada, heavily influenced by ongoing immigration; the use of information and communications technologies (ICT) in every area of citizens' work and leisure lives; and economic forces that may allow individual library institutions to expand services or force them to reconfigure those services in the name of budgets.

After several months of the distillation and summary of these pathways of thought, we developed a research proposal to support our case for what we called "the first comprehensive, industry-wide investigation of issues around recruitment, retention, remuneration, repatriation, rejuvenation, reaccreditation, retirement, and restructuring (the '8 Rs') in the Canadian library context" (8Rs, 2003). This proposal served as the basis upon which we created

a communication strategy, to talk with Canadian library associations and consortia, in efforts to build support for the project. The associations and institutions responded with enthusiasm, offering their spirit of support and resource support in response. In just over a year, we had established the people and resources we needed to begin the research.

The project proceeded at a brisk pace; we surveyed directors of institutions for the institutional survey in 2003, and individual librarians and paraprofessionals in 2004, with the final report being published in 2005, and released widely across the country. Print copies were produced and sold for a modest fee through the Canadian Library Association, and we released a free PDF version on our project site simultaneously. Multiple presentations were given to the Canadian library community through conferences and association meetings. We presented the study's highlights to provide a national picture of the workforce, as well as tailored presentations for the academic, public, and government sectors. Specific requests made by subsectors within the Canadian library community were accommodated whenever possible, resulting in presentations focused on specific areas of work such as technical services.

The 8Rs Research Team continued to build upon our research through a project supported by the Cultural Human Resources Council, a federally-funded Sectoral Council that works to serve all professions within the larger field of the culture industry. In response to their call for proposals to examine the education and continuing professional development needs and support for the library sector, the Research Team produced the Training Gaps Analysis for Librarians and Library Technicians,

This publication of responses to the study builds upon our prior knowledge in a different way. We generated statistics for writers upon their request so they could investigate their own research questions with respect to the study. The scope of the papers included here indicates how much more can be done with such an extensive dataset. Alvin Schrader considers school-to-work transitions, based upon both the 8Rs statistics and his own work within the University of Alberta School of Library and Information Studies. Deborah Hicks investigates established theories of human resources management and behavioural psychology to illuminate questions of new professionals' organizational commitment. Donna C. Chan builds upon her previous scholarship with respect to competencies within the public library sector. Marianne Sorensen, an original member of the 8Rs Research Team, looks at the profile of senior administrators within Canadian libraries. Islay McGlynn and Joan Cherry explore the 8Rs data to investigate questions of retention of senior librarians within the public library workforce. Each of these essays deepens our understanding of the Canadian library workforce and informs our professional discussions of the future of our libraries.

In summary, the 8Rs study has served a greater function than simply being a piece of interesting research. We have felt gratified to observe how others have put this research to work: the publication and presentation of scholarly works that investigate study aspects more deeply, the development of a national dialogue around human resources, and use of the findings to support institutions' own strategic planning. This collection is but one part of a greater series of efforts by the library community to better understand our human resources landscape, in order to serve our communities as well as we possibly can.

Allison Sivak

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# School to Work Transitions: Hitchhiking Across Cultures

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## Introduction

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“I just got hired, now what?” is a familiar refrain from newly-graduated librarians who successfully survive the job search and interview process. Soon after they start working, some will begin to wonder, “Why did I think I could do this?” or, “If I ask about [...] they’ll think I’m incompetent.” A little later, the slightly more shellshocked will bemoan, “I don’t even know where the light switch is. I hate asking so many dumb questions. I so feel like a fraud.” (And later still a few will exclaim, “But I didn’t learn any of this stuff in library school!”)

Newly-hired graduates face a steep learning curve in the unfamiliar workplace with unknown co-workers and inscrutable complexities of organizational policies and practices. They are almost invariably excited, optimistic, passionate, committed, and adaptable, but other stakeholder communities need to recognize that novices do not come fully formed and ready to hit the ground running in a new workplace.

They are beginning practitioners, apprentices if you will, and they face the challenge of absorbing organizational life as experienced in actual practice — not the generic abstractions described and perhaps even simulated in the classroom, but rather the local and unique realities as lived day-to-day in a particular and ever-changing context. Novices also face the infinite variability of supervisory and co-worker personality dynamics and interactions. These conditions prompt feelings of optimism and anticipation that alternate in varying degrees with anxiety, worry, doubt, confusion, bewilderment, and misgivings — a whole gamut of unpredictable emotions swinging back and forth during the first weeks and months of a new job, as some expectations are realized and others are rebuffed, deflected, or co-opted.

The mystery is, how do new graduates learn to “read” the impenetrable workplace, to learn and adapt to the local organizational story and setting, and to become productive and satisfied team members? What are their key challenges in learning to apply classroom principles, templates, and theories to real-time service delivery through the intermediary of organizational structures and social contexts? What information do they need to become, as quickly as possible, successful and productive practitioners? How do they “hit the ground running,” “find their niche,” “observe” how others behave, watch the people around them, find out how things are done, and thus survive beyond the “honeymoon period”?

And who are the key players in such success? What role should employers, supervisors, and co-workers play in facilitating the effective recruitment, integration, and retention of new graduates? While existing staff assuredly



know far more than newly-hired graduates about their own organization and its history, mission, policies, and practices, there is concern that the more years of service they have, the less likely they are to be aware of what new graduates need to know and what kinds of guidance and support are required for success. Considerable thought and attention to these questions are therefore important. And beyond the workplace, what role should educators play in helping to prepare students for professional engagement after graduation?

These concerns take on more urgency in light of the 20+ year hiatus in hiring full-time permanent staff that public sector libraries in Canada have experienced, because it has left practitioners with limited knowledge of effective strategies and best practices in recruitment, orientation, socialization, and retention. The 8Rs Research Team (2005, pp. 15, 75) research warns of long-term negative effects on staff (and, one might add, on institutions) of the continued use of short-term contract positions for new librarian entrants, pointing out that temporary jobs do not engender loyalty and a sense of being part of the organization, do not garner training opportunities or other employer benefits provided to permanent staff, and do not inspire or justify institutional investment in socializing and mentoring.

## **Chapter Framework and Objectives**

This chapter focuses on a neglected aspect of the educational-occupational relationship within librarianship that deserves considerably more attention: school-to-work transitioning, and how newly-hired graduates acquire the information and understandings they need to perform their jobs and roles successfully — by which I mean creatively and effectively. The chapter explores the key differences between classroom and workplace that have the potential to make the transitional experience deeply stressful, convoluted, and daunting for many, if not all, new graduates.

The framework for this exploration of key differences is the view that the classroom and the workplace represent two distinct cultural clusters, the academic culture of graduate professional education in the classroom as experienced by students, and the workplace or organizational culture of the library as experienced by newly-hired graduates.

The framework is informed by the intersection of understandings about social practices, organizational cultures, and occupational identity formation. Librarianship is viewed as an occupational or professional system of social practice characterized by a high degree of collaboration, teamship, and partnerships in many forms, including consortia, alliances, networks, councils, federations, coalitions, and cooperatives.

A professional social practice, in general terms, applies expertise and judgment derived from multiple forms of knowledge, including scientific, ethical, aesthetic, and personal, to address specific needs of designated clients (Myrick, 2006). Sullivan (2005) describes the “three apprenticeships” of a profession as intellectual, practical, and ethical. And Wenger (1998) observes that the occupational system serves to shape learning, meaning, and identity for membership. Identity formation in professions and organizations is an emergent process grounded in formal schooling, together with occupational and institutional socialization.

To understand organizational culture, we need to recap what organizations are. They are consciously-coordinated and goal-oriented arrangements of people, resources, technologies, processes, and systems to deliver services or products or both; they function within broader contexts of local, national, and international socio-political-economic systems and demographic, educational, ethical, ethnic, religious, and other areas that affect the way that people and organizations interact.

Organizational cultures, then, are the nebulous, fluid patternings of interactions among all of these factors, reflected in the totality of shared values, norms, beliefs, assumptions, behaviours, expectations, attitudes, management styles and relationships, ceremonies, folktales, symbols, language, rituals, myths, taboos, and traditions, together with tangible signs such as policies and procedures, authority relationships and organizational charts, job description (job profiles) and classification systems, reward systems, strategic plans, budgets, physical space, and staff dress practices and codes. Organizational cultures are the “pattern of learned behaviors shared and transmitted among members” and the “expressive elements that give meaning to organizational membership and

act as guides to behavior” (Sannwald, 2000, p. 8) They are transmitted principally through story, since culture itself is “a conversation without a center”

Sannwald identifies four functions of organizational culture:

- It gives members identity;
- It provides collective commitment;
- It builds social system stability; and
- It allows people to make sense of the organization, and in particular helps new staff understand what is expected and what it takes to become successful (p. 8).

Ballard and Blessing (2006, p. 240), citing Klein and Weaver (2000), describe “organizational socialization” as the process by which employees “learn about and adapt to new jobs, roles and the culture of the workplace.” They observe that, “To understand an organization’s culture, a person... must be able to recognize the organization’s values and benefits, observe employee relations, and appreciate the organization’s history, customs, and rituals” (p. 241).

Identity formation in an occupation (profession) is therefore a highly complex process involving interactions among a multitude of factors, including prior expectations, formal education, peer and mentor relationships, local organizational culture, socialization into the workplace, and professional associations.

This chapter is primarily an exploratory and analytical “think-piece” about school-work differences. It offers a leadership perspective on the transitional phase as understood and experienced by new graduates, employers, supervisors, existing staff at all organizational levels, and educators. The leadership framework encompasses two interrelated spheres of attitude and action:

- personal skills — self-knowledge, self-awareness, and self-regulation; and
- relationship skills — knowledge of others, including empathy and collegiality for mutual trust.

The chapter has two objectives. The first is to shed light on the perceptions and experiences of new librarians in their transitional phase, as reflected in the professional literature, findings from empirical research, principally the 8Rs Research Team studies (2005; 2006), and anecdotal reflections and accounts.

The second objective is to identify and explore the key differences between these two cultural clusters critical to the transitional phase — not only for new graduates and their supervisors, but for existing staff as well. The chapter ends with a suggested framework for thinking about best practices and strategies for enhancing workplace orientation, socialization and integration, retention, and personal career satisfaction of newly-hired graduates; this includes suggestions about the respective roles that employers, supervisors, co-workers, and educators can play in facilitating the transitional experience.

Although the immediate focus of this chapter is on novice librarians, newly-graduated library technicians, together with other experienced staff (and volunteers), transitioning from one position or workplace to another, face many of the same experiences and challenges, thus also meriting in-depth exploration and study.

In summary, it is hoped that this work will promote an understanding of the strategic leadership role that each of us — employers, supervisors, co-workers, educators, and association leaders — should play in the recruitment, orientation, socialization, and retention of new graduates. Ensuing chapter themes are: professional literature; empirical research; personal reflections; key differences in cultures; and towards strategies and best practices.

## **Professional Literature**

While a handful of books are on the market for new librarians, attention to their transitional experiences is generally quite brief. Shontz (2002), for example, includes career advice from a broader professional perspective in chapters on networking, interpersonal skills, mentoring, and leadership, but alludes in just a few paragraphs to “organizational interaction.” Gordon’s book on the “NextGen Librarian” includes one chapter on “surviving entry-level positions” (2006, pp. 63–79), which contains the short, negatively framed section, “dealing with dinosaurs.” The edited collection by Tucker and Sinha (2006) contains chapters on adapting to the new position, professional

development, mentoring, time management, and “organizational politics.” Toor and Weisburg (2007) write for the new school library media specialist, focusing on the library, interactions with students, and relationships with administrators and other teachers. There is also Mosley’s (2004) book on transitioning to middle management that deals with roles and expectations such as time management, communication, budgets, legal basics, and employee performance, but gives lesser emphasis to the transitional experience itself.

There is some journal literature in the field of library and information studies that deals specifically with the school-to-work transition, divided between articles concerning how new librarians manage the transition themselves, and articles about organizational training. While many authors do not necessarily advocate self-training, they rather seem to accept as reality that training programs for new librarians are generally lacking. Berry and Reynolds, for example, advise new reference librarians quite specifically that they will be “largely responsible for your own orientation to reference work, to your library, and to your organization” (2001, p. 34).

Authors offer much practical advice, but the one topic on which advice always becomes less concrete and less instructive is that of organizational culture. Gordon (2006) affirms the general nature of the challenge, observing that

the biggest transition for most entry-level librarians...involves adapting to a long-standing organizational culture. This encompasses everything from an informal understanding about who takes which parking space, to preferred channels of communication, to policies and procedures so old that no one remembers their actual origins. (p. 75)

Because the training of new librarians is often neglected, new graduates must decipher workplace culture for themselves. However, there is no easy way to do this, and most of the advice on this topic boils down to two vague recommendations: first, “observe how others behave,” and second, “ask questions.” Duke and Boyd, for instance, recommend that new librarians should be “proactive and observe processes, interactions, and dynamics as people go about their work” (2006, p. 201). Similarly, Shontz suggests that new librarians should “watch the people around” them to understand how they interact and make decisions, and approach co-workers “to find out how things are done” (2002, p. 105).

These admonitions echo Berry and Reynolds’ observation that a new librarian can learn about the culture of their workplace in several ways: by requesting minutes or policy statements from different committees; by watching “old informational or marketing videos” to provide insight into institutional history and culture; and by asking questions to uncover the “strange” practices there (2001, pp. 35, 36, 39). As Duke and Boyd point out, the problem with this tactic is that the assumptions creating organizational culture “are not easy to discover because people are probably not consciously aware of them. Therefore...coworkers will not always be able or willing to discuss their assumptions” (2006, p. 201).

A number of authors specifically address training as the responsibility of the new librarian (Duke & Boyd, 2006; Gordon, 2006; Shontz, 2001). Gordon, for instance, points out: “Many next generation librarians find that library school did not fully prepare them for their jobs” (p. 67). She notes that: “No one...is more responsible for moving forward and for settling effectively into a new job than you are.... Be a self-starter, and fill in those gaps for yourself” (p. 67).

In contrast, a few authors address the training of new librarians as the organization’s responsibility. For example, Schachter declares that the “orientation process is the most important factor in the successful integration of the new librarian” (2005, p. 8). She echoes the earlier advocacy by Jones (1988) for the creation of formal training programs. Jones had argued that “planned discussion” of organizational culture could prevent new librarians from “wasting a great deal of time trying to find out things that the established staff already knows and takes for granted” (p. 223). Schachter affirms this perspective: “One of the major components of integrating the new librarian into your library is to familiarize the new librarian with the organizational culture of your workplace” (p. 8).

Schachter lays out a detailed plan for orientation, including culture integration, expectations for the positions, feedback, and ongoing mentorship (2005, p. 8). The need for regular feedback is mentioned by many authors. Schachter advises supervisors to meet regularly “to give and receive feedback” (p. 9), again echoing Jones’ support for continuous evaluation of new librarians, specifically, “constructive suggestions on a regular, informal basis” (p. 224).

Nearly all authors recommend formal mentorship arrangements for new librarians (Shontz, 2002; Schachter, 2005; Duke & Boyd, 2006; Gordon, 2006). The value of mentoring is also recognized in the recent adoption of a new “Framework of Qualifications” by the Chartered Institute of Library and Information Professionals (CILIP) in the United Kingdom, which expects registered candidates to seek a mentor during their training period (Foggo, 2006). Similarly, there is a trend in American organizations such as the Medical Library Association to adopt mentoring initiatives (Kwasik & Fulda, 2006). In Australia, too, transitional mentoring programs are being studied (Hallam & Newton-Smith, 2006).

While there are a few recent articles by new graduates describing their first professional job experiences, in general the professional literature of library and information studies lacks attention to transitional issues for novice practitioners, compared with the emphasis found in other practice areas such as nursing and education. And while there is some attention to the idea of the reflective practitioner, again, this literature is not specifically geared to new graduates.

## Empirical Research

While the literature described above is helpful, much of it is anecdotal. Several recent sources of empirical data are: a survey of 63 directors and 122 entry-level librarians working in major institutions belonging to the Association of Research Libraries (ARL) by Black and Leysen (2002); a survey of 124 first-year public librarians in the United States by Newhouse and Spisak (2004); a survey of 97 new academic librarians in Canadian universities by Oud (2005); and the 8Rs Research Team survey research program (2005; 2006).

Black and Leysen were interested in formal programs and methods adopted by ARL libraries for integrating new librarians into the institutional and professional culture, including a specific focus on diversity efforts and minority recruitment and retention; they noted in particular that no collective profile then existed of effective socialization measures in these libraries. The authors found that certain activities and attitudes discouraged orientation, including negative attitudes of other librarians on staff, low salaries, a feeling of isolation within the library, a negative image of the librarian within the institution, and bureaucracy and politics within the profession (2002, p. 8). In some institutions, new librarians felt there was a bias against them. While three in four new librarians felt informal mentoring was important to their orientation, only one in four rated a formal mentoring process as important (p. 10).

Nonetheless, Black and Leysen found that although only 28% of surveyed institutions had a formal mentoring program for entry-level librarians, almost all of them felt it was a beneficial experience (2002, p. 10). New librarians without such programs expressed a feeling of isolation due to inexperience; some went so far as to claim that a “culture of disrespect” towards new librarians existed in certain institutions, thus preventing effective socialization (p. 15). Black and Leysen note, however, that supervisors can help to avoid this by acting as mentors themselves, by creating other mentoring relationships, and by providing “honest evaluation” (p. 22). They also argue that: “Effective socialization is critical to the successful transition from graduate school to the academic environment” (p. 4). At the same time, however, they observe that activities to orient and inform new librarians “are often seen as burdensome” (p. 5).

Newhouse and Spisak’s study grew out of frustration in their first year as new librarians with “bureaucratic brick walls and resistance to new ideas for libraries” that almost convinced them libraries were unchangeable (2004, p. 44). While 58% agreed that public libraries were open and affirming places for new librarians, and a similar percentage were happy in their workplaces, a large minority felt overwhelmed, under-appreciated, disillusioned, underpaid, and had trouble discovering their role in their job and in the field. These respondents did not anticipate “rigid upper administrations or the red tape that binds every decision-making process in many libraries”; while they were told in their graduate professional education programs that they were supposed to be agents of change, the reality was that change rarely occurred, owing to “blatant resistance” and de facto mantras such as “it’s always been done that way” and “that won’t work/we’ve never done that before” (p. 45). As a consequence, the resistance to change led new staff to believe senior colleagues find their ideas to be threatening.

Oud’s study focused specifically on the initial orientation and socialization experiences of newly-hired graduates. Respondents reported little or no orientation or mentoring by employers. In fact, almost 60% of new librarians

were offered no formal training when they started. Of those with formal training, 60% received thirteen hours or less of instruction. In addition, only 14% of respondents had a formal mentor. Unsurprisingly, the new librarians most satisfied with their training and jobs were those receiving more than thirteen hours of instruction.

Regardless of the time and effort required, planned orientation is a critical institutional responsibility, and its neglect represents a missed opportunity by employers and supervisors to have the primary direct influence on the socialization of new staff into the values, goals, and priorities of the organization.

Neglect of this responsibility also places a great deal of pressure on new librarians and other new staff for their own self-training and for their own ad hoc absorption of organizational culture. Oud found that the most frequent suggestion about training was for “a more structured, planned approach” (2005, p. 86). One respondent lauded this approach over “having to ask an endless series of questions” (p. 86). The survey by Newhouse and Spisak came to similar conclusions; many new librarians named training as a need, reporting they did not feel comfortable asking questions all the time; new librarians also wanted “feedback, praise and evaluation,” noting that feedback should be “timely and honest” (2004, p. 46).

The 8Rs Research Team (2005; 2006) survey research found that employers perceived new librarians, who were categorized as those in the workforce less than six years, to be ill-prepared in management, leadership, and business skills. The opinions of new graduates seemed to support this perception: only 20% of them thought their MLIS programs provided them with leadership skills; 25% felt they had gained management skills; and 12% thought they had learned business skills (2005, Table G.7, p. 123; 2006, Figure E.7, p. 86 — figures differ slightly from 2005). The perceptions of new library technicians were more positive: 40% felt they had gained leadership skills from their programs; 42% felt they had sufficient management skills; and 38% thought they graduated with appropriate business skills (2005, Table G.9, p. 127).

It appears that new librarians graduate without these skills despite the anticipation by senior administrators that leadership qualities will be difficult to replace from the current pool of applicants. In fact, 42% of administrators identified leadership potential as the hardest and most important skill to replace, while 40% pinpointed management skills in this category; 39% were concerned about future employees’ ability to respond flexibly to change (2005, Institutional Survey).

At the same time, a clear disconnect can be identified in that only 30% of institutions reported having a routine method for determining the training needs of librarians, and even fewer (13%) have a routine method for evaluating training outcomes. Moreover, nearly half (47%) of institutions said their budgets prevented them from offering appropriate training to librarians on staff (8Rs Research Team, 2005, Figure H.1, p. 136).

While some competency gaps were identified in the 8Rs research, it should be kept in mind that 75% of library administrators were satisfied with the overall quality of MLIS education. At the same time, only 64% of recent graduates were satisfied with their own program, in contrast to 81% of recently-graduated library technicians (8Rs Research Team, 2005, Figure G.1, p. 119; Figure G.4, p. 126).

The 8Rs research explored the perceptions of new librarians in connection with job satisfaction and career advancement opportunities. Overall, 78% of new entrants were satisfied with their current job and 65% believed their job provided them with opportunities to advance their career (8Rs Research Team, 2005, pp. 109, 143).

While the 8Rs research findings give some sense of the perceptions of different stakeholders about essential skills needed by new graduates, there is no direct information on the school-to-work transition experience. Indeed, it may well be that at least some of the reported deficiencies, tensions, and disconnects between education and professional practice are in some measure due to perceptual gaps between the contrasting cultures of academic study and professional work. Such contrasts and complexities impact new graduates on a daily basis as they hitchhike across the shifting terrains from one culture to another. My own pedagogic experience, albeit anecdotal to be sure, supports this view, but formal research is also needed.

## Personal Reflections

I became interested in the experiences and feelings of new graduates in their first days and weeks on their first job as a result of a happy coincidence of curiosities in my teaching assignment over the past few years about what we could learn from them that would help others, including supervisors and co-workers, as well as educators.

When I assumed responsibility several years ago for the field experience course in the Master of Library and Information Studies (MLIS) program at the University of Alberta (a 100-hour, 3-credit pass/fail optional Practicum, LIS 590, that is undertaken over the duration of an academic term), I began to think about what happens to new graduates when they move into the workplace, prompted by my concern about what makes for a successful field experience for both student and site supervisor.

I became curious about whether students could approach the Practicum experience as a prelude and testing ground for starting a new job, and as an opportunity to learn how to go about becoming socialized into a new workplace culture. So just how does a student go about learning to apply classroom principles and knowledge to the localized practicalities and circumstances of real-life service? Is it possible to put this process into words, to articulate tacit learning and tacit knowledge into guidelines for best practices in field experience programs?

With these questions in mind, I began to see the Practicum as far more than unpaid work experience, but rather as preparation for, and simulation of, what every student will later experience in their transition to professional practice. This led me to focus on school-work differences, speculating that if we were able to identify key differences, we could help students to become more prepared and make more deliberate and conscious decisions about their transition and integration into organizational life.

The result of these pedagogic reflections, together with feedback from, and conversations with, supervisors and students alike over the years, was the document *Best Practices for LIS 590 Practicum: A Holistic Approach* (Appendix A). It provides a framework for turning abstract expectations about Practicum outcomes into practical tips and explicit strategies for both students and their field experience supervisors, as well as for existing staff. The framework emphasizes the acquisition of tacit knowledge of the inner workings, culture, vision, and values of the organization, and how communication, planning, and decision-making occur. It therefore encourages students to develop an awareness of the primacy of tacit learning and informal communication in organizational settings. The framework also emphasizes the pro-active role that site supervisors and staff need to play in articulating and sharing as much of their unwritten organizational culture with students as possible, and as time permits. Ultimately, it is hoped that Practicum helps students begin to intuit a sense of local particularity, to apply and contextualize classroom learning, and to make their workplace experience more meaningful, creative, and enjoyable.

The experience with Practicum helped me approach the required Management course in our MLIS program (LIS 504) as a bridge for transitioning both to the profession and to institutional practice. In this light, I focused the course on what new graduates need to know, starting from their own level of knowledge, experience, and leadership skills.

Other observers have asked similar questions. Pergander, for example, notes that new graduates often arrive in the workplace with very little working knowledge about various aspects of being successful in the workplace and in their careers. She asks, “What does it take to connect professionally and develop respect from our peers? How can we earn what we are worth? How can we handle troubling issues in the workplace? Where do we best fit into our organizations, communities, and professions?” (2006, p. 81).

If the secret to workplace success is leadership knowledge, competencies, and personal attitudes and aptitudes, as so many authors contend, then the transitional phase is the critical time to start developing and enhancing them. Accordingly, I reframed our MLIS course as Leadership and Management Principles, concentrating on the set of skills, knowledge, and aptitudes loosely clustered together as leadership and grounded in a strong humanistic and ethical framework (School of Library and Information Studies, 2006).

## **Key Differences in Cultures**

These observations and experiences shape my own approach to students' transitional issues and challenges around the concepts of differing cultural clusters: first, the academic culture of formal schooling as experienced by students in classrooms; followed after graduation by the professional and institutional cultures experienced by newly-hired graduates.

These two cultures exhibit both common and divergent characteristics. One of the common elements is that both are in a state of subtle but inexorable flux, so that it would be reductionistic to speak of each of the clusterings as monolithic and static. Rather, each represents a complexity of cultures in continuous emergence.

The cultural differences framework is reflected in other circumstances and social settings, too. One example is the case of new politicians, who experience a steep learning curve in absorbing the unfamiliar political culture. One rural leader reports in an interview with journalist Jason Markusoff (2007, p. A1): "Most new municipal councilors, reeves and mayors are motivated by a few issues when they go into politics, and aren't really prepared to meet the complex world of strategic planning, legislation and inter-regional collaboration." And a seasoned political observer notes: "They enter a whole new world of responsibilities and dollars and language and acronyms. They don't realize how big the playground is. It can be quite mind-boggling for the new ones." (2007, p. A1):

The culture of higher education has equally distinctive underpinnings, grounded in advancing the knowledge domains of academic and professional disciplines, and within them, disciplinary research, teaching, and service. The culture of higher education emphasizes, for the most part, individual student learning and individualized student assessment, thus encouraging competition more than collaboration and teamwork, with little or no formal reward for peer-to-peer learning. The ultimate expectation, and hence measure of success, in higher education is passing grades on courses and diplomas or degrees at the end awarded to individual learners. In contrast, institutional culture emphasizes multidimensional, holistic assessments of individual contributions to both organizational success and client service enhancement. The reality is that academic achievement is not a reliable predictor of professional success.

Within this context of broad parameters characterizing higher education, key differences between school and work are identified that are likely to impact students' transitional experiences. They are: knowledge domain; expectations and success; feedback; goals alignment; governance and hierarchy; social complexity; individual versus collective modes; professional persona; social circle; relationship management; communication; tacit knowledge and learning; workflow; cycle; leadership, emotional intelligence, engagement, and reputation; and cultural lexicon. All of these dimensions of the two cultures are interrelated and interdependent; even though presented here in serial fashion, they should not be construed as distinct categories but rather as different angles of the same prism of cultural phenomena.

## **Knowledge Domain — Abstraction Versus Application**

While a professional discipline is directed towards practical aims, and thus generates prescriptive as well as descriptive theories, professional practice addresses specific needs of designated clients by applying knowledge and judgment derived from multiple domains, including scientific, ethical, aesthetic, and personal knowledge (Myrick, 2006). These differences in disciplinary orientation create and shape all other differences that students experience between the two cultures.

In a nutshell, school is about reading and learning and doing for the benefit of oneself, while work is about service for third parties. Institutions deliver services and products to clients within site-specific practices, policies, contexts, and applications. For example, students might write about "taking initiative," while new staff would be expected to take, and show, initiative; staff do not write about it to the same extent that they perform it. Similarly, students might study organizational models, while new staff will experience and have to learn how to navigate hierarchical structures. It is the difference between service delivery and writing about service delivery.

## **Expectations and Success: Outcomes, Evaluation, and Rewards — Academic Grades Versus Holistic Performance Appraisal**

The differences between what is valued in school and at work are dramatic. In the academic setting, individual learning is the primary goal, and academic expectations are measured in marks and grades by means of written assignments, examinations, and so on. Practitioner success, in contrast, is about organizational productivity and client service, with heavy emphasis on the personal characteristics and leadership skills of staff members. Evaluation is therefore a much more complex, holistic process that takes account of a multitude of qualitative factors. Compared to the workplace, expectations at school are more explicit. In the workplace, staff may or may not be told how to handle a given situation or task, and successful undertaking is not reducible to a mark or course grade.

Many students fail to perceive the paramount role and reward in the workplace for personal suitability, which encompasses the far more intangible qualities of personal and emotional skills and attitudes. Students work for passing grades for themselves, but staff work for others and in the service of others, either directly or, more often, indirectly through workflow to co-workers. These key differences are reflected in outcomes and rewards: at school the criteria are academic and personal achievement, while workplace criteria are organizational effectiveness, service enhancement, and, indirectly, client satisfaction.

### **Feedback**

An important difference relates to feedback. At school, there are regulated, written, regular, and frequent feedback cycles and mechanisms, with finite beginnings and endings that take the form of assignments, grades on courses, and programs of study (degree or diploma). At work, formal feedback is typically given to staff in written form on an annual or semi-annual basis. Informal feedback on a more regular basis is hit and miss in the workplace. Perhaps the contrast with school explains why many new staff mention lack of feedback as one of their most important complaints about their new environments, and many authors urge more systematic and sustained attention to it (Newhouse & Spisak, 2004; Schachter, 2005).

### **Goals Alignment**

Echoing the differing emphases on expectations and rewards, school and work differ in how individual and institutional goals are aligned. In the academic setting, goals are individually set by students and pertain to individual learning and career pathway; they are more or less one-dimensional. By contrast, in the workplace the goals of each staff member must be aligned closely with those of the organization: with its values, vision, mission, objectives, outcomes, clients, and power relationships. Any disjuncture impacts organizational success in delivery of services and products to clients.

### **Governance and Hierarchy**

Governance and hierarchy represent critical differences. In a nutshell, students do not have organization charts. While governance and hierarchy are realities in academic administration, for the most part they are invisible, and thus irrelevant to students. In the workplace, on the other hand, governance and hierarchy are prime determinants of organizational culture as experienced by all staff, and indirectly by clients; organizational context is paramount to the success and continuing vitality of the institution. In the workplace we find overlapping layers of external environment that are simultaneously legal, regulatory, economic, social, technological, social, and client-centred; for example, organizations frequently undertake impact assessments, a concept foreign to the experience of students in their academic work. Above all, the governance structure of libraries is essential for the delivery of services and products to clients, and every such organization has a “parent” reporting relationship, including public libraries accountable to residents in general and to municipal councils and/or provincial or territorial governments for fiscal policy and financial support.

A related difference is found in the degree of individual freedom and choice that the two cultures enjoy. At school, students are free to attend classes or not (though there is occasionally a marks penalty for absenteeism), and in-class time for the full-time student may be as little as 9 to 12 hours per week. In contrast, the workplace demands much more structured time commitments, with organizations controlling and regulating hours of work, paid holidays, and so on, and in full-time work expecting 35 to 40 hours per week physically on site (telecommuting



aside). The “life of a student” captures the contrast. In general there are few penalties, if any, for skipping class, again in contrast to the workplace, which in principle does not pay for work not done.

In addition to the emphasis on individual learning in educational settings, the vast majority of students experience no continuous hierarchical relationships; their professors change with the seasons, and as long as they maintain satisfactory academic records, they are unlikely to encounter much bureaucracy, though it is there in the vast infrastructure of the academic institution as experienced daily by all academic staff; in contrast, the workplace involves a much more significant hierarchy and more complex lines of authority, power relations, and organizational protocols, for example, spending authority policies and practices.

Furthermore, while there is a temporary hierarchical relationship between student and professor, it is of finite duration, and students can withdraw from the relationship with few, if any, negative consequences, even recognizing that another course would have to be substituted and previous tuition lost.

The workplace is often a new graduate’s first introduction to formal supervisory relationships and positional authority, organization charts, and the concepts of organizational models and decision-making, together with the concepts of division of labour and levels of responsibility, authority, and delegation. Probably the only introduction to organizational hierarchy experienced by students is the study association, and it is among the flattest structures possible, with the exception of some orchestral and jazz groups.

Embodying organizational hierarchy are organization charts and office and equipment allocations, together with job descriptions (job profiles) and job classification structures that serve the classic management functions of work specialization and supervisory delegation. The notion of delegation in student work would be called slacking off, fraud (not doing one’s own assignments), or plagiarism.

The combination of greater hierarchical complexity and work specialization requires correspondingly more complex levels of consultation within and outside the organization, so that all those with knowledge and authority who might be impacted by planning and operational decisions are at the table.

### **Social Complexity — Linear Versus Multi-layered Relationships**

While students usually work individually, and interact on a purely voluntary basis, the workplace is much more socially complex, with staff tending to apply social and interpersonal skills much more than students are required to do, especially in terms of the imperatives of continuous networking and relationship management. It is conceivable, though obviously not desirable, for a student to speak to few peers during their entire educational program; such a situation in the workplace would jeopardize not only career prospects but organizational effectiveness and client service. Moreover, informal relationships and hierarchies of influence operate in the workplace in more consequential ways than in educational settings.

At school, students have few obligations to others; at work, the expectations are much greater to consult and sustain relationships with a wide range of stakeholders, and this is true at every level in the hierarchy. At work, what one leaves behind is one’s reputation, with negative or positive consequences. At school, reputation is important on a personal level, but generally irrelevant to the academic reward system. In the school setting, students can avoid those they do not like. For the most part in the workplace, staff have no choice about who they work with and are stuck indefinitely with the peers they find there; avoidance can have harmful consequences for the organization and clients.

### **Individual Versus Collective Modes of Behaviour and Accountability**

Closely allied to social complexity is mode of work, and whether one is independent and working for oneself or dependent on and working for and with others. While it is true that some academic course assignments require group work, in organizations the locus of accountability is multidimensional, involving relationships that are interactive, continuous, and consequential.

Academic group work is terminal in the sense that one never has to speak to particular group members again unless encountering the misfortune of being saddled with another group project, and the consequences end with

the assignment of an academic mark that only indirectly, if at all, reflects and accounts for interpersonal group effectiveness, but rather is more likely to be based in traditional academic criteria of merit. Although there is an anti-social minority in the academic setting, there is nonetheless a more heightened sense of community in school; it is less so in the workplace.

Workplaces also involve more, and more continuous, teamwork than is found in the school setting. Meeting management and participation are important skills in the workplace, while they have little place in the educational environment. In the workplace, work is accomplished through and with other people, a rare circumstance for students.

Moreover, at school students act independently to learn; at work, staff work interdependently in supervisor-subordinate relationships and through teams. Teams for academic assignments are useful but artificial, and the interpersonal relationships developed or damaged during teamwork terminate with the completion of the assignment; of course, there are ongoing personal consequences, but in the workplace the consequences carry over into organizational workflow and subsequent team projects.

The ubiquity of teamwork within the workplace is undoubtedly a surprise to many new graduates; Edmonton Public Library, for example, in a recent count had 22 standing teams and the University of Alberta Libraries had 28 teams.

Occasionally courses have a class participation mark, an essentially artificial academic component that has no parallel in the workplace. Indeed, putting up one's hand in a class-type environment in the workplace would be an atypical event.

Moreover, even when course assignments require team presentations in front of the class, they are artificial exercises with generally superficial responses. In workplace presentations, follow-up questions, requests for more data, or challenges to ideas presented are authentic, and sometimes disturbing, expectations. Students generally do not have to defend why they presented the information that they did and the way in which they did.

## **Professional Persona**

School-work differences are as obvious as the visual and physical dimensions. Personal appearance in the classroom is for the most part irrelevant and ignored, at least in terms of academic reward and success. In many workplaces, personal appearance is a career breaker, even where dress codes are only part of the tacit knowledge of the organization.

But professional persona differences go further. In school, a reputation for cultivating and sustaining relationships means friends or no friends, while at work such a reputation is critical to individual and institutional success.

## **Social Circle**

In school, a fully formed social circle is handed to one in the sense of one's cohort of peers, though of course there is the option of ignoring them in whole or in part. At work, new staff must establish their own social circle, if any, and the newly-hired graduate will probably be the only one in their "cohort." At school, a large cohort of new student peers entering the academic program at the same time is ready-made and simply assumed. When new graduates enter the workforce, they automatically lose their peer group, or at least the physical ubiquity of it, and may find it more difficult to adjust socially to a more diverse staff complement.

## **Relationship Management**

In educational settings, the management of relationships involves principally student-teacher interactions; in the extreme, what students produce is almost exclusively documentary, and therefore they can succeed academically without ever interacting verbally with others (except for occasional class presentations or class participation requirements). In contrast, in the workplace organizational relationships involve a complex clustering of interactions — supervisory-subordinate, peer-to-peer, external, and client. Moreover, organizational communications are principally oral, whether above, below, across, or outside; policies and procedures manuals are produced but infrequently referenced.

Accordingly, in the workplace “EQ” trumps “IQ”; that is, the phenomenon of emotional and social intelligence (quotient) is more important than grade point averages on academic transcripts. When students fail to appreciate this extreme shift in emphasis and priorities, there is a real danger of ego dysfunction leading to severe issues in interpersonal relationships. Losing the ego about high student grades and graduation from prestigious universities is essential for workplace success; occasionally the failure to appreciate this can be a career killer for new graduates. Again, it is a matter of interpersonal reputation versus the academic reward system.

## **Communication**

In the academic setting, although day-to-day communication with students is primarily verbal, critical communication on assignments is expressed in written instructions that form a contractual responsibility and relationship. Ironically, while students do not typically have a written job description, workplace staff do. Nonetheless, the vast majority of communications in the workplace are verbal, including job assignments and project instructions. Contemporary awareness of the tremendous importance of communication skills in the workplace is in sharp contrast with 30 or 40 years ago, when almost no job advertisement for librarians mentioned communication skills at all. And the skill of listening to others, the least taught of all communication skills, is the most critical leadership skill.

A recent BA graduate, Tyler Carlson (2007), writes about his new job transition: “Upon moving into the workforce, I quickly realized that my strengths lie in my ability to communicate and make social situations cohesive. I did not realize the extent to which these qualities play in professional relationships and how essential they are to advance one’s career.”

## **Tacit Knowledge and Learning**

The classroom involves a much different style and kind of learning than one finds in the workplace. Sources of information are text-based in school, people-based at work. While the student in school encounters some forms of tacit knowledge, most learning takes place by means of textual materials and lectures, some now recorded for podcasting or other telecommunication technologies.

This contrasts with the workplace, in which tacit knowledge and informal learning are the primary vehicles for knowledge acquisition. For example, “water cooler talk” is easily dismissed by novices and the jaded alike as office gossip, framing such conversation negatively rather than as knowledge transfer and knowledge sharing through storytelling among co-workers. Deep understandings of organizational, personal, interpersonal, and contextual dynamics specific to the local setting are gained primarily through informal, oral learning.

Much of organizational culture is not easily recorded into words, and is therefore elusive, unpredictably emergent over time, and shaped by a myriad of factors including the arrival of every new staff member and the departure of every existing one. While the classroom imparts codified knowledge, principles, and practices at a high level of abstraction and generality, organizational culture is local and particularized, tacit, and orally transmitted. Moreover, unwritten background knowledge and historical context loom much larger in the workplace than in the classroom.

Because cultural communication is about giving expression to ideology, values, norms, and practices, it is particularly in the arena of “office politics” that understandings can only be acquired orally, erratically, and in piecemeal fashion; it may be that office politics is a negative label for the tacit underpinnings of organizational culture, including interpersonal relationships.

## **Workflow**

At school, students submit the products of learning to instructors for evaluation and feedback. At work, staff submit their results to supervisors, peers, and ultimately clients for service, evaluation, and feedback. Organizational workflow may be a complex clustering of incremental enhancements of the end product or service goal. Moreover, the written work done by subordinates is subject to revision and approval; instructors evaluate and assign marks to student work but rarely require revision.

## Cycle

The cyclical nature of school is quite different from that of work, as is its impact. In the academic setting, courses start and finish, as do programs. There is a finish line, or rather, many small finish lines, and then a cumulative and culminating end point; students start afresh each term. This contrasts with the workplace, which offers no end to the creation and unfolding of social reality and organizational culture. Workplaces are open emerging systems with some cyclical events and conditions overlapping with unpredictable and even chaotic events and conditions; for example, organizational time is structured around the budgeting cycle, performance appraisals, and client cycles, and external factors such as the school year, government time frames, and so on.

Students can also pull “all-nighters” with impunity. In the workplace, such behaviours, if revealed, will be regarded skeptically as poor time management that might well jeopardize critical timelines, teamwork, and project management.

## Leadership, Emotional Intelligence, Engagement, and Reputation

Threaded throughout the above facets of the two cultures are contrasting styles in leadership and engagement. In school, students can be relatively disengaged from other students and instructors, and still be successful in the academic sense of getting good grades — even stellar grades! By contrast, in the workplace, success depends on the personal and interpersonal qualities and skills of leadership, emotional intelligence, and emotional engagement with the organization and its clients. EQ trumps IQ; social intelligence is more important than intellectual intelligence. Reputation in the workplace is critical to continued success, in contrast to the situation with student culture.

## Cultural Lexicon

Finally, given the many fundamental differences identified above, it is not surprising that the vocabularies of academic culture and workplace culture differ dramatically, and the lexicons of organizational cultures are rich in both generic and highly localized concepts and meanings.

One informal typology of school-work differences (MacLeod, 2007) is their clustering into four overlapping themes or categories: structure; relationships; communication; and performance expectations. She found feedback to be a recurring theme: lots at school, little at work.

Another interesting summary of key differences was developed by Myrick (2006), who identifies the following contrasts between classroom and practice experiences:

<b>Classroom</b>	<b>Field</b>
predictable	unpredictable
unipurpose	multipurpose
controlled learning experience	selected learning experience
learning activity: theoretical	learning activity: experiencing
learner energy focused	learner energy shared
distractions limited	distractions ubiquitous
time determined	time uncertain

All of these differences suggest why many new graduates experience anxiety and bewilderment in their transition from school to work. They no longer have the same comfort zone in work as in school, nor the same structure, end-goals, evaluative criteria, or precision and regularity in feedback. They must come to embrace a very different style of learning: learning to “read” the local context, including organizational culture and history; learning the elusive and unwritten history, rules, and protocols of the workplace; learning to take more personal initiative in setting workplace goals, which in turn means learning to engage in more personal reflection, awareness, and self-evaluation; learning informally and casually from other people, not from the written word, academic texts, and

published research; learning through networking, personal connections, and talking to people; learning to interact not only within the formal hierarchy, but to recognize the influence relations at play throughout every level of the organization; and finally, learning to appreciate increased social and psychological complexities in team work and in exercising influence. In sum, the ultimate reality of the workplace is about cultivating and managing relationships. Organizational life is a life of continuous networking.

The driving forces for new graduates leading to healthy workplace socialization, integration, and retention are a complex clustering of individual identity formation, occupational ethics, organizational ideology, corporate values, interactions with people at all levels within and outside the workplace, technologies, and external socio-political-economic conditions.

## **Towards Strategies and Best Practices**

How are we to overcome the challenges presented by these differences between school and work? The solution is not found in pinpointing blame, but rather recognizing that higher education and professional practice perform two distinct functions in society, each with inherent boundaries and limitations on its scope of power and action.

There are several strategies and solutions that should be considered and publicized as key principles and “best practices” for school-to-work transitioning. These suggestions involve more than the relationship with immediate supervisors. At least four important stakeholder groups are identified: employers and supervisors; co-workers; new graduates themselves; and educators and researchers. There are also implications for professional associations and continuing education institutes.

First, it is important for all practitioners to recognize that new graduates face a steep and continuous learning curve. All parties need to approach the first year as the year of apprenticeship; in some established professions, such as law and medicine, this is structured formally as interning. But in their first six months to a year, and whether formalized or not, new graduates are interns, novices, apprentices, or inductees.

This is first and foremost because of the complexities of applying research and classroom learning to professional practice. Such application is not a simple linear process; nor is research comprehensive in all areas relating to practice.

Moreover, many well-intentioned practitioners advise new staff members to “keep your eyes open.” But just exactly what does this mean? New graduates need help and insights with day-to-day politics, organizational structures, corporate culture, workflow, and development of interpersonal skills. They need mentoring, advising, shadowing, listening, contextualizing, and receptivity to their new ideas. They need assistance with “weird politics,” with difficult people, with sorting out what is valued by the organization and what is not, and mentoring to help manage anxiety and self-pressure so that they keep a balance between their steep learning curve and the perceived, self-inflicted expectation they have to become “superlibrarian” by the end of the first week (Schrader, 2005, p. 49).

Professional associations also have a potential role to play in socializing new entrants into the ideology (or ideologies) and values of occupational practice. They can offer valuable experience that cannot be obtained in the classroom. Associations also play a lead role in developing profiles of occupational competencies and behavioural aptitudes that best describe a successful practitioner (8Rs Research Team, 2005, p. 129). Several professional associations in the United States have done this already, for example, the Special Libraries Association (2003) and the American Library Association (2005); the latter was recently critiqued by McKinney (2006).

Supervisors and co-workers need to be sensitive to the new graduates’ vulnerability, and to their enthusiasms and new ideas. They should also keep in mind the difficulty of shifting from simple binary student-teacher relationships to having a supervisor and many co-workers, and perhaps even dual reporting relationships.

Employers should also brief supervisors and co-workers on what to expect of newly-hired graduates, and on what they can do to help them. For instance, supervisors and co-workers must be aware of the new graduates’ vulnerability and insecurities. They should be sensitive and receptive to their enthusiasm and new ideas. In fact, every idea should be treated as a good idea for the first six months of a new graduate’s employment. This will help build the new employee’s feelings of confidence and security.

Co-workers and supervisors can also help newly hired graduates with day-to-day context, background, and local culture (or as one new grad described it, “weird politics”). It is also helpful if they recognize that their local culture is all about tacit knowledge, tacit learning, and workplace socialization. If a mentoring culture is developed, it will make the new graduate’s adjustment move much more smoothly. In addition, workplaces should develop and expect a leadership perspective from all staff, including new graduates. Within this mentoring culture, co-workers can help new grads to practice new skills, such as communication, relationship management and networking, self-understanding, and self-presentation skills and aptitudes. If necessary, these skills may be rehearsed through role-playing. Co-workers can also offer meaningful feedback on the new grad’s development of these skills.

Newhouse and Spisak suggested several ideas for developing open, affirming libraries: provide financial support for staff education; provide staff training through mentorship or appropriate trainers and encourage continuing education; offer praise, consistent feedback, and time to discuss work performance with supervisors; and be open to new ideas, embrace change, and practice easy communication, so that new staff feel valued (2004, p. 46).

Many of these practices are simply good practices for all staff: recognition, praise, communication, feedback, and celebration are all leadership behaviours that, when practiced regularly and consistently, reinforce organizational values and goals alignment; demonstrate sincerity, empathy, and caring; increase emotional wellness, self-confidence, trust, and loyalty; facilitate innovation and productivity; and impact client satisfaction. Recognition is an important part of emotional intelligence.

However, these are all just abstract and abstractions. These ideas concern attitudes rather than things to be done. The following are some practical actions that help to smooth the choppy transition period.

### **Employers, Supervisors, and Co-workers**

Of prime importance is an orientation and mentoring plan for the new graduate. This plan should also include expectations for co-workers, who play a critical role in the socialization and success of new staff. Oud suggests a more structured approach to orientation, rather than forcing a new employee to “ask an endless series of questions” (2005, pp. 86–87). Moir and Stobbe identify five phases that new teachers commonly experience in the “induction year”: the anticipation phase, the survival phase, the disillusionment phase, the rejuvenation phase, and the reflection phase (1995, cited by Kronowitz, 2004, p. 173). Omidshar and Young argue that experienced librarians also need a well-planned orientation program (2001, p. 21).

Ballard and Blessing (2006) describe a multifaceted approach to employee orientation that grew out of a decade of development at North Carolina State University Libraries, beginning with the implementation of standard orientation checklists in the mid-1990s.

One compelling reason for a planned orientation is that supervisors and employers tend to provide too much information for the new staff member to absorb all at once. As one new graduate writes of their orientation, “It’s a bit overwhelming because the supervisor tends to tell you a lot of things and there’re so many new names and faces to remember. There are so many things involved in the first day at work.” Another writes, “There’s a lot to learn right off the start, and since I began at the busiest time of the year, I’m pretty much just trying to keep up. Everybody at the library is really supportive of the fact that I’m learning, which helps immensely.”

An example is found in longstanding practices among cataloguers. While educators in this area teach general principles with simulated applications to help student learning, the primary responsibility for imparting localized policies and practices — i.e., local cataloguing culture — resides with the supervisors and staff in the local organization. If this is true in an area as codified and prescriptive as our cataloguing principles and practices, it is even more evident in the complex cluster of leadership and management skills that cannot be learned in the abstract in the classroom. Local culture is overlooked in this equation, as is the central role of the organization in acting as the primary initiator of integration and socialization.

The creation and use of a formal training manual for new employees will help with this. An example of a comprehensive training manual and program is that of the Edmonton Public Library (2007), which is organized into a set of modules and checklists; part of the documentation is a very useful “What to Expect...As a New EPL Employee” during the first few days; during the first few months; and during the first two years.

Oud (2005) also advocates more practical, hands-on training, such as practice exercises, finding answers to mock reference questions, exercises based on collection development scenarios, and job shadowing. The orientation process should also involve introductions to key contacts and guidance in dealing with commonly encountered situations.

Many authors urge the development of mentoring cultures within our institutions (Osif, 2006,). Hand in hand with such a culture is the need for improved feedback, evaluation, recognition, encouragement, and praise, to help build self-confidence. One new graduate describes her first impressions of a new job environment: “From the very first moment I arrived, I was made to feel welcome, and more importantly, needed. I was included in meetings, managed a project independently, and prepared a substantial literature review.”

Oud (2005) recommends another staff member be formally designated as a contact person to answer the new graduate’s questions for approximately the first six months. Some employers assign a buddy for the first few days so there is someone to have coffee and lunch with, if they care to, and also just to be around. In addition, new librarians should be encouraged to cultivate external contacts with other librarians in other institutions. In addition, a formal evaluation process should be decided upon. Oud suggests that new graduates should be offered feedback on their progress throughout this process, and follow-up training sessions should be scheduled.

Workplaces can also help in other ways: they can sponsor professional internships, leadership institutes, and programs for continuing professional development, or they can participate in practicums.

## **New Graduates**

New graduates can also help to ease their own transition from school to work. They can study job ads in every functional area taught in the MLIS curriculum, in order to glean information about required skills and expectations of employers. In order to adjust to the new kinds of relationships they will have with superiors, new graduates can also set up a weekly appointment to touch base or check in with their supervisor; this meeting need not be long and formal — twenty minutes over coffee might be sufficient (Galt, 2006). They can develop a list of questions and issues to seek information about from their supervisor or co-workers.

Above all, they must maintain constructive relationships and positive attitudes with all colleagues so that they can say goodnight and good morning every day. This involves emotional and moral intelligences more than intellectual intelligence: Be the boss you want. Jordan, for example, makes the case for systems librarians taking the initiative to educate themselves in the need for developing enthusiastic attitudes and traits for dealing with constantly changing technologies (2003, p. 278).

Even before their first day, new graduates should find out as much as possible about their imminent workplace, including mission statement, website, and so on.

New graduates should also develop their own orientation plan even before the first day on a new job. And within the first few weeks or months, they should develop their own continuing education plan. They should not assume that these activities will automatically occur; they may have to take the initiative themselves. One tool is the 30-60-90 day work plan in which the new librarian identifies specific objectives for each 30-day period on the job; for example, the first 30-day period might be described as the steep learning phase, fleshed out with concrete actions for achieving such learning, or as the information-seeking phase, similarly fleshed out. Another phase might be the deep information phase.

In terms of organizational culture, it is important for new graduates to absorb both the wisdom and the history of the organization, to be comfortable in a leadership role, and to understand the culture and the values of the organization. That means they must learn to seek out expertise and to ask questions without fear. New graduates need to make as many connections as possible and as soon as possible (but not to go to lunch with negative, grumpy people).

They should cultivate relationships with all core workers, including support staff, develop an understanding of what everyone does by job shadowing; and seek how to communicate and how often with their supervisor. They need to stretch themselves: express interest in new projects and assume new tasks even when a little fearful. They

need to recognize they have a lot to learn and recognize they can learn from everybody in the organization. They also need to develop a grasp of the big picture, through strategic plan statements about organizational vision and mission, and through staff updates and information sessions.

In a nutshell, new librarians must leave their shyness at home and resolve to ask questions of everyone they work with. Much of this inquiry can take place informally and through tacit learning, around the water cooler, at coffee and lunch breaks, and in other social opportunities. The new librarian should make a list of questions, group them, and decide which need consultation with their supervisor and which can be asked of co-workers. They should also be very alert to interaction dynamics among others, for example, at meetings, in project teams, and in social settings.

In general, new graduates should become not only inquisitive but also reflective practitioners. This involves an active process of meaning-making, which leads to greater self-awareness in the workplace and potential for personal advancement, as well as improvements in the organization's service delivery and effectiveness. Becoming a reflective practitioner is both a cognitive and emotional process. New graduates must also ensure they practice good self-care and maintain a healthy work-leisure balance. Self-knowledge leads to self-confidence and resilience. It is also the secret to being able to play up strengths and play down weaknesses.

As one new graduate told me, "As a new employee I realized quickly that being a librarian involves demanding deadlines, high expectations, leadership responsibilities and busy schedules," adding that: "Every day is something new, and the work will never cease to interest or challenge. It is important to take things day by day and to have confidence in abilities and skills. Everything is a learning process — just because you get that degree, doesn't mean you can ever stop learning!"

A useful exercise for the first few weeks on the new job is to keep a daily journal of activities and self-reflections. By the end of the first month, new graduates should start setting realistic goals and by six months, goals for professional activities and association memberships. Ultimately, career success depends on the individual, and Pergander sets out 19 questions to help staff set their own behaviour standards and performance criteria, all with a view to answering the question, "Would I want to have myself for a boss?" (2007, p. 72).

During the pedagogic experiences chronicled above, many recent graduates, as well as more seasoned library managers, offered their perceptions and observations that have helped shape and focus my interest in, and understandings of, school-to-work transitional issues. One such testimonial, "Diary of a New Librarian — One Month On..." written by Anwen Burk (Appendix B), chronicles the author's experiences, challenges, emotional responses, stresses, stressors, and insights as she began her first professional position after graduation from a Canadian MLIS program. "So far," she writes, "I would say my biggest challenge has been to figure out what the culture of the library is."

Another new graduate comments, "I used to think that my managers always knew what they were doing. What I'm realizing is that they didn't know any more than I did. It's just that they were responsible for making the decisions." Still another notes, "At times, I almost think not knowing a lot is a bit of an advantage, as I'm not really attached to my own ideas about a solution, and that makes me appear more flexible because I'm willing to change my mind and go along with other people's ideas if they are solid and hold up to questioning." Another recent graduate observes, "When I first started I found that I often had to really take the initiative to take care of my own training and development. I registered for online tutorials and webinars, and did a lot of reading in areas new to me." New graduate Alsop writes: "Life is very different than I once envisioned, but reluctance and hesitation about the profession have given sway to appreciation." She urged new graduates to abandon preconceived notions, be yourself, be flexible in what you envision doing as a librarian or where you might work, bring in your talents, and "choose to love the opportunities" (2007, p. 40). These sentiments echo those of another new graduate writing several years ago, who said: "The philosophy of "going the extra mile" was never advocated at library school, and is one that is essential in serving the public. Students leave library schools with an elevated sense of self, unwilling to do certain tasks" (McKay, 1989, p. 244).



## Educators

Educators play a key role in shaping student expectations. The challenge is to develop curriculum that promotes leadership, creativity, advocacy, and planning, within the larger context of a strong belief in excellence in client services and collections.

They can help to smooth the transition their students will face by creating a curriculum which is focused on developing reflective practitioners (Hallam & Partridge, 2006). Within the library and information studies field, critical reflection is a core skill. Educators should ensure that students are exposed to core value statements and literature such as Michael Gorman's (2000) *Our Enduring Values: Librarianship in the 21st Century*. Educators can also provide management courses grounded in leadership concepts and skills such as self-presentation, self-knowledge, social awareness, and interpersonal presentation and communication skills. And keep in mind that leadership skills, which are essential in library and information services, should not be referred to as "soft skills"! These courses should also give students the opportunity to practice job search and interview skills.

Educators can also expose students to job ads and association competency statements in every course. In addition, they can cultivate good practitioner and alumni relationships through guest lecturers, instructors, tours, demonstrations, and job shadowing opportunities. Educators should encourage practitioners to share expectations involving personal competencies and essential elements such as communication skills, especially listening skills; team work, meeting, and other participatory skills; interpersonal management skills, such as respect and recognition; creativity, vision, flexibility, and openness to change; integrity and ethical behaviour; a strong service orientation; patience; tact; a sense of humour; and intellectual freedom principles and practices.

Educators can also partner with employers and professional associations to create professional development opportunities such as leadership institutes and programs.

Educational institutions, in partnership with the practitioner community, can also offer practicums, cooperative experiences, and other field experiences that enhance the student's ability to grasp local workplace culture and to begin to learn how to learn what it is and how one becomes socialized into a particular organization. The practicum and cooperative experiences should be regarded as more than a job; supervisors and co-workers should approach them as opportunities to share and transmit the organizational culture, as well as to help students gain leadership skills through experiential learning and self-reflection. Educators and practitioners together can guide students to focus on issues such as values, boundaries, criticism, hope, fears, and ethics.

Finally, educators as researchers are urged to conduct more research into the transitional experience. It seems ironic that so little is known in our field about the early experiences of new graduates. Several other professional disciplines have made substantially more progress than we have in this area, among them nursing and education.

A tool referred to previously that I developed to help guide the practicum experience is the *Best Practices* document (Appendix A), which is for both students and supervising practitioners. This document provides a tentative framework for making some of our expectations more explicit. This framework is built around the idea of helping students learn about the unwritten knowledge of how the organization works, and about the ways in which tacit understanding of the inner workings of the organization could be communicated to students. In this way, students can start to grasp a sense of the local organizational context, and get a reality check for their classroom learning. Hopefully, this will make their workplace experiences more meaningful.

In passing, I note a serious deficiency in the accredited graduate programs in North America for two reasons. First, some U.S. programs do not even have a required management course of any description, and second, none of the extant required courses have "leadership" in their titles. The textbooks in our field reflect this weakness as well, leaving discussions of leadership to chapter twelve or thereabouts (Stueart & Moran, 2002; Evans, Layzell Ward, & Rugaas, 2000). In my opinion, concepts of leadership — embedded in experiential learning through simulated practices, role-playing, and reflective exercises — should colour the entire management curriculum, because leadership competencies are ubiquitous in the actual occupational practice of organizational service delivery.

Other factors that should be addressed in the educational and research communities for successful workplace integration are: the lag in pedagogy emphasizing leadership constructs in management courses; the lag in

adoption of research and innovation by practitioner communities; and the divide between theory and practice (see, for example, Crowley, 2005).

However, no matter how well employers, supervisors, co-workers, and educators do their part, it is still, and will always be, a big leap from the classroom to the workplace.

## Conclusions

Some critics have voiced what I take to be the radical view that “the problem” is we are attracting too many of the “wrong people” to the profession, and that all we really need to do is take a different approach to recruitment into educational programs. Perhaps these critics are right, but I am more optimistic. I believe the majority of our novices have untapped potential, and that “the problem” lies elsewhere. Moreover, studies show that it is current practitioners who exercise the most influence on recruitment into the profession (Berry, 2003); in the 8Rs study, 60% of current MLIS students reported hearing about their program through word of mouth, second only to 77% for program websites (8Rs Research Team, 2006, Figure D.1, p. 42).

This chapter suggests that it is in the contrasting cultures of school and work that the problem lies. This chapter has therefore focused on key perceptual differences between academic culture as experienced by students and workplace culture as experienced by employees (or volunteers), in an endeavour to facilitate recruitment, socialization, creativity, productivity, retention, and satisfaction.

Some employers and staff assume that there is another sort of simple solution to workplace integration: better graduate programs (however “better” might be defined) and more responsibility by educators for workplace preparation. While the quality of graduate education should never be taken for granted, the perspective of this chapter is that everyone should step back to problematize and critique these kinds of overly-simple expectations expressed by the field.

Indeed, the field’s expectations of formal education raise a longstanding issue about the appropriate balance between theory and practice. Just how far can educators go beyond general principles and simulated practice before novices enter the workforce as professional practitioners? Where should simulated practice end and paid employment begin? We need to resurrect the debate over balance, because it is not an “us” versus “them” binary. It is the classic question between education and practice. But the solution will not be found in reversion to the rule-bound apprenticeship system of 19th and early 20th century librarianship.

On the contrary, I am advocating two points: first, that educators need to make the school-work differences more explicit as part of the educational process; and second, that supervisors and co-workers must recognize their responsibilities in the school-work transitional phase.

I hope that the insights suggested in this chapter will yield somewhat deeper appreciation of the appropriate balance between formal education and employer expectations and responsibilities. Ultimately, more careful attention by the field is needed to these differences and their implications for organizational practice and orientation strategies, transitional phasing, sustained job orientation, workplace socialization, coaching and mentoring, continuing professional development, career progression, and overall quality of the workplace.

In short, a leadership and strategic planning approach to transitioning should be developed. This will pay off in building trust, confidence, and loyalty among new librarians, and simultaneously build greater creativity, innovation, and empathy within the organization itself. Educators will also benefit by having a clearer understanding of, and closer relationship with, the broader community of practitioners.

The solutions are to be found in sustained leadership strategies to be exercised by all staff. I hope that the framework elaborated here will help to make transitioning, orientation, socialization, integration, creativity, mutual satisfaction, and retention more effective for the organization and its workforce. Relationship building and management are everyone’s responsibility. Everyone must share in job orientation and workplace socialization for new graduates.

The alternative for many new graduates is a rocky journey hitchhiking across shifting terrains as they attempt to adjust to the very different demands of organizational life; the alternative for organizations themselves is the risk

of a diminished — if not failed — return on the substantial investment of time, energy, and resources expended in recruiting and retaining new graduates.

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### **Biographical note:**

I was challenged to bring my checkerboard of workplace, academic, and volunteer experience to bear in thinking about the differences between the classroom and the workplace, and how to facilitate the student's transition to professional practice. I have extended that thinking in repositioning the Master's required course in management into leadership and management with action learning incorporated throughout.

## **APPENDIX A**

### **Best Practices for LIS 590 Practicum: A Holistic Approach**

Students see the Practicum as an important, positive step in helping them to explore their career potential and gain professional experience and socialization. Supervisors also express satisfaction in interacting with students over the extended period of time afforded by the Practicum. While not all placements prove to be uniformly outstanding (about one per year is less than positive for either or both parties), this document tries to identify basic approaches and practices for successful Practicum experience as suggested by recent contributors, both supervisors and students, in a half-day consultation and through individual submissions. The Best Practices and other course documentation are available at [http://www.ualberta.ca/~aschrade/lis590/590\\_outline.htm](http://www.ualberta.ca/~aschrade/lis590/590_outline.htm).

### **Key Purposes**

- for the student to absorb insights into and tacit knowledge of the inner workings, culture, vision, and values of the organization, including relevant professional socialization
- for the student to gain an understanding of how communication, planning, and decision-making occur in the organization, both at a local level and at a system-wide level if applicable
- for the student to gain practical experience in applying classroom learning to workplace tasks and projects as mutually negotiated

### **Key Organizational Practices**

- the School's documentation about the course
- the School's care in matching the student with the institution and supervisor
- pre-placement exploratory meeting between the student and the supervisor to clearly articulate interests and expectations on the part of both parties, and before final agreement to proceed is made
- detailed planning and preparation for the student's arrival
- work plan and regular schedule for the student, in consultation and mutual agreement between the supervisor and the student
- in-depth orientation and training
- supportive supervision with adequate time for ongoing communication and mentoring with the student, for touching base regularly on projects, experiences, and expectations, and for feeling valued in the workplace
- shared supervision, interaction, informal learning, and networking with as many staff as possible

- arranging for the student to observe at staff meetings, team meetings, discussion groups, and other planning processes, and to contribute as appropriate
- in general, viewing the student as an integral part of the organizational team

## Projects

- professional level, clearly defined, meaningful, manageable
- recognizing limited time is available after socialization and other regular activities

## Measuring Success — very qualitatively

- how well the student integrates into the organization
- how well the student interacts with all staff
- student confidence level growth and transformation

## APPENDIX B

### Diary of a New Librarian — One Month On...

Anwen Burk

Since my first few weeks have already ended, I will not write this journal in a day format. Instead, I will write down my experiences and challenges as I remember them, and also provide my emotional responses to those experiences.

In a way I was very lucky because I had very little time to think about my new job before I started it. Instead, I had one week to pack up, move to another community, find a place to live, and start work. Therefore, I was able to concentrate on other aspects of life and was not able to focus only on starting a new job as a new librarian. This prevented me from spending too much time worrying about potential stresses I would encounter on the new job.

So far, I would say the biggest challenge has been to figure out what the culture of the library is. All the people I work with are extremely helpful and supportive, but it has taken about 3 weeks for me to really feel as though I have some idea about what makes them “tick.” This caused me some stress to begin with because it is very hard to feel a part of the staff when you have very little idea about how they think, what their views are, and how you fit into the workplace. It was also difficult to get used to the personalities of my new co-workers. One of the people I work closely with has a very different view of life and work than I do, and at the beginning I found it hard not to slide into her way of thinking. Once again, since I was the new kid I felt as though if I were different, then I was wrong and/or might have to change.

I have the additional challenge of living in a small community where the rest of the staff have lived for a long time. Thankfully, it is also a transient community so they are used to people coming and going. Probably the person who I have the greatest level of understanding with is the only other person who is also a “newbie.” We both feel some of the same stresses because we are still learning how the place runs.

To add to this is the fact that while it is perfectly normal for it to take some time to get a feel for the place, I am also still learning the basic policies and procedures of the place. And, as with any organization, this included the underlying beliefs and the unwritten/spoken attitudes which affect the way policy and procedure is carried out. In my new position I am “second in command” and I find it very strange not only to be supervising people who have been there for much longer than I have, but who have a much better understanding of how the library functions.

To ease some of this strain I cannot overemphasize the importance of asking questions. After the first week of continually asking for clarification, I began to feel a bit of a nuisance, but if I did not continue to ask questions my anxiety would build. The fact of the matter is that when we are trained in new positions, especially in a small library which does not have the budget for extensive, formal training, much of the training may have to be self-instigated (if that is a word).

Since the staff has been there for a long time, and much of the stuff has become second nature, it is only natural that they will leave things out when they are training you. Unfortunately, that put me in the position of having to ask around to fill in the blanks, but in order to perform my job effectively it is what I had to do. In the day-to-day workings it is easy enough to ask as you are going along. However, I also found that developing a list of the more complex questions (e.g., about specific duties, programming, etc.) was very useful. This way I was able to make an appointment with my boss and ask all the questions at once. It meant that some of my questions had to wait a day or two to be answered, but it also meant that I didn't feel as though I was bothering my boss every time I had a question.

The steep learning curve I experienced also meant that at times it was hard to keep my confidence levels up. Everything was so new that it was difficult to feel confident in my abilities as a librarian, when everyone else seemed to know more about the library than I did.

To reassure myself, I just reminded myself that I was bound to feel overwhelmed. I just had to accept that, and move on — and thankfully I had enough work to do that I could focus on it rather than on what I felt I didn't know.

I also realized that while I knew less about the library and the way it worked, I did know a lot about librarianship and the way it worked. I also kept reminding myself that they had hired me for the position so they must have seen some potential!

Basically, I just faced the fact that this was going to be a stressful situation and there was no point in wishing that it wasn't. That does not mean that it needed to be a negative experience, I just found it easier to deal with the stress once I accepted that it was inevitable. The other thing that I found really useful, and continue to find useful, is to make sure that I take time to myself and realize that even though this new job may be the biggest thing in my life right now, it is not the only thing. Most new grads will be in the same boat that I am in, in that you don't have much money, but I found that taking some time to read, watch TV or go for a walk was really useful. The main thing was to just leave work at work and turn that part of my brain off when I left.

Another experience I found to be stressful, and I have found the same to be true in many jobs even though it was more pronounced in this one, is the time when the "training" phase wears out. By this I mean that at the beginning of most jobs (and the time frame is usually longer depending on the complexity of the job) there is the phase where you are just getting trained and just getting used to the place and the people around you. This is usually a great time because you are learning and meeting people, but nobody really expects you to be going full blast at what will eventually be your job. You are still seen as the new person who is still learning, and usually the work is not piled on quite as heavily.

But then, that phase ends and you actually start taking on the responsibilities of the position. Suddenly, all those things I thought would be so fun and exciting to plan, I actually have to do. This created a sense of confusion and panic for a few days while I realized that I would actually have to do all these things that we had discussed for the past week or so! The panic, of course, wore off but had I not been in the same situation previously, and expected it to happen, then it would have been far more stressful.

Another challenge I had from the very beginning was the fact that I was replacing a librarian who had been very popular. Therefore, I not only had to do my job but I had to do it with the reputation of the person before me hanging over me. For the first week I found this very difficult; I constantly felt as though I was working in that person's shadow. This, compounded by the fact that I was already feeling a bit insecure and out of place in this new position, made it hard for me to be myself and establish my own personality and way of doing things at work. Therefore, it has taken me about a month to really feel that I am finding my own self in my new position.

One thing that the first few days of work told me is that the skills we learn at school and the way they are applied and/or the skills we use at work can be very different. While what I learned at library school certainly comes into the theoretical aspects of my job, there is no way that we can be prepared for learning the skills that make the everyday workings of the library work. Each work place is different and each has its own policies and procedures; I have found that figuring out these intricacies has been more of a challenge than figuring out the strictly "librarian" tasks associated with my job.

I am finding, even more so than I did at school, how I work and my ideal working conditions. It is sometimes difficult to make the shift from a place where my work is only a reflection of myself, to a place where it is a reflection of a workplace and of other people. This can add pressure, but it is simple reality and another challenge to face.

The first weeks were a time when I felt uncomfortable in my place and felt as though I was not yet in a position where I could challenge the way things worked, but that is changing as time goes on and I am gaining a better understanding of why things are the way they are, what my role is (it takes time to figure this out!), and what the roles of my co-workers are.

Having discussed all these challenges, I do need to say how in all these it is wonderful to be doing a job that I really enjoy. This has made it so much easier to deal with the challenges.

In the first few days there were certainly moments of doubt and wondering if I had made the right decision. I think this is a natural reaction to any new situation, especially one that involves so much of your time and is something you have worked to get.



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# ‘I Love My Job, But ...’: The Role of Organizational Commitment in the Recruitment and Retention of New Professionals

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## Introduction

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Recently, conventional wisdom has said that it is not unusual for an individual, especially one who is either younger or new to a profession, to have many different positions at different organizations during the course of his or her career. In fact, this same wisdom also says that newcomers to a profession will expect to move from position to position and organization to organization. This wisdom, however, is not supported by current research and statistics; Statistics Canada found in 2002 that the job stability rate in Canada had improved from 1976 to 2001 (Heisz, 2002). *The Future of Human Resources in Canadian Libraries* reports that many newcomers intend to remain with their current organization. The reasons individuals stay, or want to stay, with their organizations are varied. The 8Rs Research Team report that the top two “pull” reasons (issues relating to the organization) many librarians cite for staying at their current libraries are they like their job (85% of all librarians regardless of sector) and they like their co-workers (84%). Personal reasons for staying included spouse working in the same geographic region (51%) and wanting to stay in the community (48%). It is interesting to note, however, that the lowest rated “pull” reason for staying was loyalty to employer at 56% of all librarians (8Rs Research Team, 2005, p. 103). This is particularly interesting because employer or organizational loyalty is often considered to be, in human resources management literature, an important factor in employee retention. And, it is especially important in the retention of new recruits to an organization. In this chapter, the dichotomy between the newcomers’ desires to stay at their organizations and the overall low percentage of self-reported organizational loyalty will be explored. If, as the human resources management literature indicates, organizational loyalty is an important factor in employee retention, and librarians appear to have such low levels of this loyalty, then why do they wish to stay at their current organizations? This is particularly important for newcomers, as they have not yet had the opportunity to develop a commitment, or loyalty, to their organizations. What other factors could be influencing this decision? And, what could the impact of this be on the profession as a whole?

This chapter will explore these issues by defining terms that will be used throughout the chapter: organizational commitment, job satisfaction, and career commitment. Reviews of the organizational commitment and new employee literature, and the organizational commitment and librarianship literature will be completed to help place the findings of the 8Rs Research Team study into context. Finally, gaps in the Library and Information Studies (LIS) literature will be discussed and suggestions for further research will be made.

## Organizational Commitment

Organizational commitment (OC), also known as organizational attachment or loyalty, has a variety of definitions within human resource management and behavioural psychology literature. Broadly, organizational commitment can be defined as “a psychological state that binds [an] individual to the organization (i.e. makes turnover less likely)” (Allen and Meyer, 1990, p. 14); however, what creates that psychological state is still up for some debate within the literature. Some theorists link OC with the psychological concept of involvement, meaning that an individual’s performance at work is linked to his or her self-esteem. This would mean that an individual who is highly involved in his or her job would also be highly involved with his or her organization (Lodahl and Kejner, 1965). Or, in other words, “this conceptualization of involvement suggests that individuals form bonds with organizations to the degree that their self-conceptualizations are engaged in their jobs or organizations” (Beyer, Hannah, & Milton, 2000, p. 331). Organizational commitment is also discussed in terms of loyalty. Loyalty is often understood in terms of behaviours, for example, remaining with an organization in times of organizational decline (Hirschman, 1970) or sacrificing personal reward for organizational gain (Adler and Adler, 1988). This type of OC is often linked with how employees identify with an organization, meaning that an individual’s own beliefs of belonging to an organization will affect his or her identification with that organization (Kramer, 1991). Some definitions of organizational commitment are purely instrumental. Becker (1960) describes OC in terms of costs and side-bets (or benefits). The more side-bets an individual makes as a member of an organization (pension plans, seniority, or status, for example) the less likely he or she is to leave. In other words, the cost of leaving an organization, once an individual has placed too many side-bets, might be high if the benefits of those side-bets are perceived to be of greater value than the cost of leaving.

All of the above conceptualizations of OC focus on one or two aspects of the notion. Allen and Meyer (1990) provide a fuller and better-rounded definition of the idea. For them OC has three different dimensions that function separately from each other, but provide a deeper understanding of commitment when taken together as a whole. The first facet of commitment they identified was affective commitment, defined as the degree to which an individual identifies with the organization and the extent to which he or she is involved with the organization and is similar to the involvement theory of OC. Jaussi (2007) recently built upon Allen and Meyer’s understanding of affective commitment by arguing that this component of commitment can itself be broken down into three dimensions: positive affect (or feelings) for the organization, identification with the organization, and willingness to exert effort on behalf of the organization. Next is continuance commitment. Here affect (or emotion) plays a minimal role. It is closely related to Becker’s (1960) understanding of costs and side-bet OC. An individual only stays with an organization because the costs of leaving are perceived to be too high. Finally, Allen and Meyer identified normative commitment, or the “belief about one’s responsibility to the organization” (1990, p. 3). In other words, an individual remains committed to an organization because he or she believes it is a right or moral thing to do.

Allen and Meyer argue that there is a link between each type of commitment and reduced employee turnover, but that the nature of each is fundamentally different: “Employees with strong affective commitment remain because they *want* to, those with strong continuance commitment because they *need* to, and those with strong normative commitment because they feel they *ought* to do so” (1990, p. 3). Employees can experience varying states and levels of each form of organizational commitments at once or separately. For example, an individual may feel a strong sense of normative commitment and have a high degree of continuance commitment, but experience little or no affective commitment towards an organization, but this individual’s level of overall commitment would not necessarily be any less than someone who experiences high affective commitment, but lesser continuance and normative commitment. In addition to identifying the three interrelated components of commitment, Allen and Meyer also identified two factors that influence the continuance of organizational commitment: “the magnitude and/or number of investments (or side-bets) individuals make and the perceived lack of alternatives” (1990, p. 4).

## Job Satisfaction

Broadly defined, “job satisfaction is the positive or negative attitudes held by an individual towards [his or her job]” (Greenberg & Baron, 2008, p. 221). Although it is related, job satisfaction is an independent concept from organizational commitment. There are many theories to explain job satisfaction. The two-factor theory of job

satisfaction argues that satisfaction and dissatisfaction are influenced by different factors. Motivators, such as opportunities for promotion and personal growth, are responsible for satisfaction, while hygiene factors, such as working conditions, pay, security, and interpersonal relationships, are responsible for feelings of dissatisfaction. Like Allen and Meyer's understanding of organizational commitment, this theory of job satisfaction does not function on a continuous scale. Instead, satisfaction and dissatisfaction are two separate variables that may all be present at once that help conceptualize overall job satisfaction (Greenberg & Baron, 2008). Another theory of job satisfaction is the dispositional model. It posits that job satisfaction is a stable variable independent of the particular work environments or situations: "people who like the jobs they are doing at one time also tend to like the jobs they may be doing at another time, even if the jobs are different" (Greenberg & Baron, 2008, p. 222). Finally, and perhaps the broadest, is the value theory of job satisfaction. This theory argues that job satisfaction is dependent on the match between outcomes a person values in his or her job, such as pay, opportunities, etc., and his or her perceptions of the availability of those outcomes (Greenberg & Baron, 2008). Satisfaction, therefore, is the measurement of what employees want versus what they have.

Like organizational commitment, job satisfaction is related to turnover. Specifically, the more satisfied a person is with his or her job, the less likely he or she is to leave the organization; however, earlier it was stated that organizational commitment and job satisfaction are independent concepts. This is because an employee might be satisfied with his or her individual job, but be unhappy about the organization for which he or she works. In this situation, the employee would have a high degree of job satisfaction but a low degree of organizational commitment. That said, high job satisfaction and high organizational commitment have been found to lessen turnover in organizations (Falkenburg & Schyns, 2007).

### **Career Commitment**

A related, yet separate, concept is career commitment (also referred to as professional commitment). Defined by Hall as "the strength of one's motivation to work in a chosen career role" (1971, p. 59), it can be measured not through one's attitude towards a job or organization, but through one's attitude towards one's profession through behaviours like participating in professional activities such as belonging to professional associations or reading professionally-focused materials (Blau, 1985). It is characterized by the development of career goals, and an attachment to and identification with those goals (Colarelli & Bishop, 1990). Blau argues that "career commitment involves the extent to which work activities figure into life plans and the desire to work in hypothetical situations where there is no financial need" (1988, p. 286). High career commitment has been found to have a negative effect on turnover rates, meaning that an individual with a high career commitment might be more likely to leave a job if there was a benefit to his or her overall career (Blau, 1985, 1988).

This concept is different from job satisfaction or organizational commitment, as the commitment is to the overall profession and not to a specific job or organization. Perhaps the biggest difference between these concepts is that while job satisfaction and organizational commitment are created in response to situations and environments outside the employee, career commitment is generated as a result of internal goal setting (Colarelli & Bishop, 1990).

### **Organizational Commitment and New Employees**

When an individual joins an organization, his or her expectations, experiences, and the orientation provided by the organization all play a part in how that individual develops a sense of organizational commitment. Meyer and Allen (1987) argue that there is probably no other time in an individual's career when he or she is as susceptible to organizational influence than at the start of the career. In order to better understand this potential influence, Louis developed a theoretical model to explain how newcomers experience their entrances into an organization. She identified three core experiences: change, contrast, and surprise. Louis describes change as something that is "publically noted and knowable" (1980, p. 235). It could be as evident as a change in location or title, or as personal as the change from student to professional (i.e., status). But, regardless of the exact type of change a newcomer experiences, most newcomers will experience being an "outsider" in their new organization's information and influence systems. For newcomers who are both new to an organization and new to a profession, the number and complexities of change they experience are expected to be larger than for an individual who is just new to an organization, for that individual would have previous experiences from which to draw upon for comparisons.

Unlike change, contrast, for Louis, is a personal experience. It is associated with letting go of old roles. While the newcomer is learning about his or her new role, the memories of the old role will correspond to the new activities. The experiences from the prior role will contrast with the experiences of the new role, creating a contrast. Surprise is defined by Louis as the “difference between an individual’s anticipation and subsequent experiences in the new setting” (1980, p. 237). Finally, surprise can happen when job expectations are not met, when expectations the newcomer has of him or herself are not met, when the new job has unanticipated features, or when the newcomer makes inaccurate assumptions about the cultural environment of the new organization. Regardless of its form, all surprises require adaptation on the part of the newcomer, but because the newcomer is separated from the informal information and influence structures, he or she is often cut off from the histories and cultural understandings that would provide him or her with enough understanding to quickly adjust to a change or surprise. To illustrate, Louis used the example that an established organizational member might not be surprised when an expected pay raise is denied, because he or she would be aware that the entire organization is experiencing budget cuts, whereas a newcomer, being unaware of the cuts, might not have such a ready explanation and may be more likely to explain the surprise in terms of poor job performance. In addition, newcomers, lacking access to informal information structures, often revert to previous experiences to help them understand their new organization. This can be particularly difficult for newcomers who are also recent graduates, as their experiences and expectations gained at school would be different than at work. For example, experiences with supervision and deadlines might differ greatly between each setting. Cohen argues that age and tenure should be considered two different factors for determining newcomers’ experiences. Age, he argues, “as an indicator is affected by both career and organizational issues and important psychological issues in one’s life-events” whereas “tenure is an indicator that reflects mainly career issues with fewer effects upon life-events” (1991, p. 265). Although recent graduates are not necessarily younger in age, this chapter will focus on the experiences of newcomers who are not simply new to an organization, but who are also recent graduates and/or younger in age as the theory indicates that their experiences will be similar.

These experiences and expectations are central to the development of organizational commitment in newcomers. Organizations attract and newcomers select each other based on the perception of fit. And, what influences the newcomer’s selection of a particular organization are called pre-entry factors (Schneider, 1987). Pre-entry factors include education, family influences, and pre-existing attitudes and experiences with particular organizations or types of organizations. In Arnold and Mackenzie Davey’s (1999) study of graduate work experiences as predictors of organizational commitment, it was discovered that many graduates pursue a particular degree path because of perceived career prospects. They argue, therefore, that it can be extrapolated that early job and organizational choices could also be based on career concerns and, as such, can be understood as an important pre-entry factor in determining OC. Meyer and Allen (1988) found that organization-related pre-entry expectations (such as salary, training, and culture), when met, had a positive effect on the development of OC in newcomers. Sturges and Guest (2001) furthered the discussion when they argued that certain pre-entry expectations originate as “promises” the organization has made to newcomers during the recruitment process. These promises create expectations for the newcomers about the kinds of work they could be expected to do and the amount of training and career development they could receive. But, these pre-entry expectations only set the framework for the development of OC; it is early work experiences that determine its direction, especially when experiences do not match up with expectations (Meyer & Allen, 1987; Meyer, Bobocel, & Allen, 1991; Arnold & Mackenzie Davey, 1999; Sturges & Guest, 2001). Meyer, Irving, and Allen (1998) found that affirmative work experiences related to “comfort” variables, such as a regular routine, job security, ample leisure time, and good working conditions, had a positive effect on organizational commitment (especially affective commitment), whereas “competence” variables, such as the position being intellectually stimulating, ability to contribute to society through one’s work, feelings of accomplishment, and encouragement from the organization to develop and grow, had a negative effect on OC. Unfortunately, Meyer, Irving, and Allen were unable to provide an explanation for this negative effect, especially since, on its surface, this effect is counterintuitive; however, they did discover that commitment only developed when the newcomer believed that the positive experiences were attributable to the organization directly and not to the position itself or to a supervisor. In addition, Meyer and Allen (1987) found that when none of a newcomer’s pre-entry expectations were met through work experiences, then his or her attitude towards not only the organization, but also the job itself, deteriorates.

Organizational commitment is related to the retention of recent graduates in organizations (Sturges & Guest, 2001); however, ensuring that newcomers have some form of OC is not enough. Studies have found that the type of OC an individual possesses is important, specifically when it relates to the quality of the employee's work output. Angle and Perry argue that commitment to stay and commitment to work are two different constructs: "a strong desire to remain a member of one's organization does not automatically imply that there is also an intention to be a dependable and hardworking employee" (1981, p. 10). Meyer, Paunonen, Gellatly, Goffin, and Jackson (1989) found that affective commitment, the degree to which an individual identifies with the organization, and the extent to which he or she is involved with the organization, had a positive effect on job performance, whereas continuance commitment, the degree to which an individual remains with an organization because the perceived cost of leaving it is considered to be high, was negatively related to job performance. Employees with high continuance commitment, "may be motivated to do little more than perform at the minimum level required to maintain the jobs on which they have become dependent" (Meyer et al, 1989, p. 155). Although on its surface it would appear that newcomers to an organization would have little continuance commitment, because their limited time with the organization indicates that they probably would have developed few "side bets" that would cost them to leave, Meyer and Allen (1987) and Meyer, Bobocel, and Allen (1991) argue that many newcomers can develop a sense of continuance commitment because they may feel that there are few alternatives due to a tight job market, and geographical, personal, or other constraints. In these cases, commitment is based on perceived need and not desire.

In addition to pre-entry expectations and work experiences, the amount of education the newcomer has impacts his or her organizational commitment; however, it has an inverse effect. This means that the more education a newcomer has, the less likely he or she is to have a high degree of organizational commitment. Steers speculates that this inverse effect may be because it can "be more difficult for an organization to provide sufficient rewards (as perceived by the individual) to equalize the exchange. Hence, more highly educated people...would be less committed to the organization and perhaps more committed to a profession or trade" (1977, p. 53). This is an important point to consider when attempting to understand librarians' OC resulting from the entry requirement of a Masters of Library and Information Studies, or its equivalent.

## **Organizational Commitment and Librarians**

Although the concept of organizational commitment has received a lot of attention within the behavioural psychology and human resources management literature, it has received relatively little attention within the Library and Information Studies (LIS) literature. The literature that does exist tends to focus on turnover in libraries and not OC per se. What is discussed, however, is job satisfaction. As mentioned above, this concept cannot be used interchangeably with organizational commitment; however, since the OC LIS literature is so sparse, this review will examine some of the available job satisfaction literature to help provide context for further discussion and research directions.

The OC LIS literature consists of approximately four studies: Rubin and Buttlar (1992), Hovekamp (1994), Noor and Noor (2006), and Noor and Noor (2007). Rubin and Buttlar's study of the organizational commitment of high school media specialists in Ohio was, at the time of its publication, the only study into the OC of librarians. This study found that this highly specific group of employees had a high degree of organizational commitment that was grounded in "attachment to their particular jobs, recognition by [the school] system, respect from administrators, job challenge, and variety" (Rubin & Buttlar, 1991, 321). Most of the employees in the study were long-term employees (having worked at their current school system for over 9 years) and had developed social networks that had bound them to their organizations. The only surprising result for Rubin and Buttlar was their respondents' conviction that their jobs were secure, even though many of the school systems that employed them were under strict financial constraints. However, Rubin and Buttlar thought this could be explained, in part, by the respondents overall length of tenure with their organizations and, in part, by the fact that many of the respondents had chosen the career of librarianship after pursuing one or two previous careers. Rubin and Buttlar speculate that since librarianship was a second or third career for many of their respondents, they were more realistic about their job expectations before entering the profession and, therefore, more committed to their organization. In her study of librarians in research libraries, Hovekamp (1994) approached the issue of organizational commitment through the lens of union membership. She found that union membership had almost

no relationship to overall OC. Her findings supported previous research findings that indicate that non-library employees might have equally strong feelings towards their union and their employing organization. Following this direction, Hovekamp concluded that high union commitment among librarians could indicate high organizational commitment, yet her own research indicated that few librarians had a high union commitment, whereas they did have favourable opinions towards their employers. More recent studies into the OC of librarians are Noor and Noor (2006) and Noor and Noor (2007). In their 2006 study, Noor and Noor found that the Allen and Meyer Organizational Commitment scale was appropriate for use in studying librarians, specifically Malaysian academic librarians. In their 2007 study, Noor and Noor used Allen and Meyer's scale to assess the work- and worker-related variables in determining affective and continuance OC. Work-related variables were job satisfaction, job involvement, job autonomy, job performance feedback, role conflict, and role clarity. Worker-related variables were age, job tenure (number of years an individual has taken up a first job position), and employment tenure (number of years an individual has worked for his or her current organization). Noor and Noor (2007) found that job satisfaction, job involvement, job autonomy, job performance feedback, and role clarity were all positively related to affective OC. This means that the more positive the experience an employee had with each variable, the more likely he or she was to have high affective organizational commitment. Not surprisingly, role conflict was negatively correlated, meaning that an employee in a conflicting job situation would be more likely to have low affective OC. None of these variables, however, impacted continuance OC. What was surprising, however, was that the worker-related variables (age, job tenure, and organizational tenure) were all negatively related to continuance commitment, and had no relation to affective commitment, which contradicts similar non-library studies. Noor and Noor speculate that these surprising results might be due to the cultural expectations placed on Malaysian women. As in Canada, the majority of librarians in Malaysia are female and, according to Noor and Noor, Malaysian women are more likely to opt for early retirement and "the longer their tenure in [a] library, the greater the likelihood of them quitting or retiring and this might explain their decreasing levels of continuance commitment towards their library" (2007, p. 461). Unfortunately, there has been no similar study of the OC of librarians, therefore it cannot be easily determined if the surprising results are in fact due to cultural expectations or if they are an anomaly.

Recruitment and retention are two concepts often discussed in relation with turnover. And, although the 8Rs Research Team has brought a lot of attention onto these topics in recent years, much of the LIS literature focuses on strategies and suggestions for both recruitment and retention (Chapman, 2009; Level & Blair, 2006; Neely & Beard, 2008; Singer & Goodrich, 2006; Smith, 2006; Stanley, 2008; Stringer-Stanback, 2008). Research studies into the recruitment and retention of librarians, outside of that by the 8Rs Research Team, are fairly rare. An early study into recruitment and retention is Usherwood, Proctor, Bower, Stevens, and Coe's (2000) survey of British public library employees. Their goal was to obtain a baseline for recruitment patterns and to identify factors that influence retention. Usherwood et al. found that the biggest attractors to the profession were public service and a desire to work with the public, and the biggest deterrents were low salary levels, negative professional image, and few opportunities for advancement. Retention, however, did not seem to be a problem for the organizations in this study. Usherwood et al. found that while 76% of library administrators expected their new employees to stay for three years or more, the reality was often that new employees remained with the organization for much longer. One participant described the situation thusly: "I would *hope* they might stay about three years but in fact they stay for decades" (2000, p. 70). Many of the reasons cited for staying were negative and included lack of other opportunities, family commitments, and fear of change. However, the strongest attractors for the profession were also what kept people with the profession, namely the intrinsic nature of the job and the resulting job satisfaction. Millard (2003) studied academic librarians in Canada to determine what factors influenced long-term job satisfaction in this population. Millard found that 80% of Canadian academic librarians had been working for the same institution for over 15 years. Like the public librarians in Usherwood et al., the most commonly cited reason for remaining was the satisfaction the participants gained from their work. However, participants in her study ranked their organizational commitment as low, citing concerns with management. Millard argued that this satisfaction with work itself is indicative of high career commitment among academic librarians.

As mentioned above, organizational commitment is tangentially discussed in the LIS literature on turnover and job satisfaction. Rubin's (1989) study of public library turnover and Christopher and Tucker's (2008) study of health sciences librarian turnover both revealed that librarianship has an extremely low turnover rate. Rubin

compared the 7% annual turnover rate of librarians to the 42–67% rate of nurses, the 30–34% rate of social workers, and the 11–17% rate of primary and secondary school teachers. Both Rubin and Christopher and Tucker found that those who did leave their organizations left either for a new library position (34% for Rubin and 33.6% for Christopher and Tucker) or retired (34% and 29.9% respectively). Rubin speculates that this low rate of turnover is related to the fact that, for the most part, librarianship is a second career for many professionals; this means that librarians could potentially be better prepared for the realities of the work environment due to their maturity and previous work experiences. In addition, this maturity could also indicate that librarians might have family responsibilities that require them to remain employed, because they require the income from their job to support themselves and their families. In addition, Rubin speculates that many librarians believe that there are few alternative employment options in their particular geographic area, which discourages them from looking for other employment. In addition, many librarians report high levels of satisfaction with the work that they perform. This satisfaction could make librarians less likely to pursue other employment opportunities.

The literature on librarian job satisfaction agrees with Rubin's assertion that librarians have a high level of satisfaction in their work. In fact, it is the work itself that librarians perform that is most often cited in the literature as the source of this job satisfaction (Sierpe, 1999; Wahba, 1978); however, this does not signify that librarians are satisfied with all aspects of their jobs. Generally, the studies into librarian job satisfaction find that many librarians are dissatisfied with the lack of advancement opportunities and low rates of pay (Library Journal, 2007; Schneider, 1991; Sierpe, 1999; Wahba, 1978). Wahba speculates that any satisfaction librarians feel towards their work could be dampened by this dissatisfaction, and that ultimately this could have an impact on job performance and attendance. Additional aspects of job dissatisfaction were lack of recognition of accomplishments (Sierpe, 1999) and the perceived competence of management (Berry, 2007). Schneider (1991) notes that most of the dissatisfaction that librarians feel as a result of their work is not related to the intrinsic nature of the profession, but is instead related to the particular system for which the librarians work. This could potentially magnify feelings of dissatisfaction because these issues are perceived to be changeable by the system, but are seemingly ignored by management. In Schneider's study this led to participants making statements like "I love my job but..." (1991, p. 399) which distinguish between feelings for the intrinsic nature of the profession and the particular system for which they worked. This dissatisfaction, however, did not prevent 86% of the respondents to *Library Journal's 2007 Satisfaction Survey* from indicating that they would start their career over as a librarian or 87% of respondents from stating that they would recommend librarianship as a profession to others (Albanese, 2008). Job satisfaction in librarians has been found to grow during the course of one's career (Albanese, 2008; Lynch & Verdin, 1983; Lynch & Verdin, 1987). For example, in *Library Journal's Satisfaction Survey*, only 22% of respondents under the age of 30 reported being very satisfied, while 39% of librarians 50 and older reported the same. Lynch and Verdin (1983) also reported that new entrants (those with 1–4 years experience) were the least satisfied; however, their 1987 replication of the study did not uncover this same result, while it did confirm their original findings that overall satisfaction increases as job tenure does.

### **The Effect of Career Commitment vs. Organizational Commitment**

The human resources management and behavioural psychology literature on organizational commitment state that OC is an important factor in the retention of new recruits to an organization. This is, in part, because as newcomers to an organization, new recruits are more susceptible to organizational influence and will be more likely to develop the affective form of commitment most often associated with low turnover rates. Organizational commitment in newcomers is developed, in part, through the organization meeting the newcomer's pre-entry expectations and, once a member of an organization, providing positive work experiences. Unfortunately, there has been little direct study of OC in librarians, and no study of OC in new librarians. The two most relevant studies into the OC of librarians indicated that librarians do indeed have some positive organizational commitment (Rubin & Buttlar, 1992; Noor & Noor, 2007). Both of these studies speculate that the high degrees of OC they recorded were, in part, related to the choice of librarianship as a second career (Rubin & Buttlar, 1992) or the gender makeup of the profession (Noor & Noor, 2007). Two studies, however, are not enough upon which to base a theory of OC in librarians. In addition, the LIS job satisfaction literature indicates that librarians may, in fact, have a low degree of organizational commitment. Many of these studies found that while librarians are generally satisfied with inherent qualities of librarianship as a profession, many of them were unsatisfied with the specific

aspects of their positions that related to the organization they worked for, such as pay, advancement opportunities, and management. These contradictory findings make the 8Rs Research Team's findings even more worthy of discussion. The Team found that in 2002 only 25% of libraries surveyed had a librarian leave their organization, and the majority of the departures were voluntary (for reasons other than retirement, dismissal or relocations within the same larger organizational structure, such as government). In addition, only 2 in 10 senior administrators reported that turnover was a concern for their organization (8Rs Research Team, 2005). That study also surmises that low turnover rates might be related to high degrees of job satisfaction among librarians, for 40% of recent entrance, 47% of mid-career, and 70% of senior librarians reported that they were interested in remaining at their current organization for the rest of their careers. The top five "pull" reasons for staying (regardless of years of experience) were "like my job," "like my workplace," "like co-workers," "loyalty to employer," and "loyalty to library patrons." Out of these, the top-rated reason to stay was "like co-workers," with "loyalty to employer" ranked last. Personal reasons for staying included spouse works in same geographic region, issues relating to children and friendships, a desire to remain in the community, and family and friends who require attention. Much lower down as cited reasons to stay were that there were no other jobs available or no other jobs at current position's salary/benefit rate, not being successful at finding position at another organization, and not having enough time to look for another job. These findings contradict Usherwood et al.'s study, which found that many librarians stay due to a perceived lack of job alternatives. The findings do, however, support the overall LIS job satisfaction literature.

Such high rates of retention with such apparently low degrees of organizational commitment, yet high job satisfaction, appear to contradict the non-LIS OC literature. But, to properly understand why librarianship appears to be a unique case in terms of OC, more research into how organizational commitment is developed in librarians needs to be completed. What, for example, are the pre-entry factors for librarians? The OC literature places a large amount of emphasis on the role these factors play in the development of OC. The LIS literature has speculated that one factor may be that librarianship is often a second career choice for many librarians, which, therefore, changes their work expectations; however, there has been no study into this fairly unique circumstance. It is additionally important to understand these factors due to the apparently negative effect education has on the development of OC. If the OC literature is correct, holders of advanced degrees are less likely to have high amounts of OC and are more likely to have high degrees of career commitment. Why, then, is there not more movement within librarianship as employees move from organization to organization in an effort to advance their careers, as the career commitment literature indicates? Is there, perhaps, something inherent in LIS education (a pre-entry factor) that affects this low rate of turnover? Or, is there something inherent in the personalities of those who choose librarianship as a profession? There are a few studies into the personalities of librarians to consult (Agada, 1984; Goulding, Bromham, Hannabuss, & Cramer, 2000; Loy, 2008; Williamson, Pemberton, & Lounsbury, 2008).

Further investigation is required into the perceived lack of alternatives for newcomers as it relates to organizational commitment. Several studies (8Rs Research Team, 2005; Usherwood et al., 2002) provide contradictory evidence on the perception of alternatives, but the OC literature indicates that these perceptions are vital in determining the commitment of newcomers. This is particularly important for organizations to be aware of because organizational commitment that is based upon a perceived lack of employment alternatives is related to poor job performance (Meyer & Allen, 1987; Meyer et al., 1991; Meyer et al., 1989). With such low rates of turnover, when there is a vacancy, an organization is provided with an opportunity to influence the makeup of the staff complement, "each turnover becomes a comparatively rare opportunity to introduce productive employees into the system" (Rubin, 1989, p. 44). If the successful candidate accepts a job offer based solely on the perception that there will be few other alternatives, then this rare opportunity for a productive employee may be lost.

Finally, there needs to be a more comprehensive understanding of the experiences of newcomers once they are members of the organization. The LIS literature indicates that generally librarians are satisfied with the inherent qualities of their jobs, but that they are dissatisfied with the aspects of their jobs that are perceived to be under the control of the organization they work for. This implies that there might be some negative work experiences relating to these organizational issues. The OC literature indicates that these negative experiences will have an equally negative impact on the development of OC in these employees. How, then, does the overall satisfaction with the inherent qualities of librarianship (which presumably could be had at any library) function alongside the dissatisfaction with organizationally controlled issues to create a low turnover, and by extension high retention, rates?



## Conclusion

Organizational commitment is a multi-dimensional concept that seeks to explain the “psychological state that binds [an] individual to [an] organization” (Allen & Meyer, 1990, p. 14). Although there are many theories of OC, Allen and Meyer’s theory offers the most thorough explanation. Instead of just focusing on one aspect of commitment, Allen and Meyer’s definition looks at all factors of commitment: affective, continuance, and normative. Each facet addresses a different psychological state. The organizational commitment literature primarily focuses on the development in organizational newcomers through pre-entry expectations and early work experiences. When pre-entry expectations are met by the organization, alongside positive early work experiences, newcomers can be expected to have high rates of OC. There is, however, a paucity of research into the development of organizational commitment in librarians. The LIS literature provides a contradictory understanding of librarians’ organizational commitment. On the one hand, the few OC-specific studies that have been completed indicate that librarians have a high rate of organizational commitment, but the studies into librarians’ job satisfaction seem to show that there is low OC, but high job satisfaction and career commitment. And, although job satisfaction and organizational commitment are related concepts, they are not synonymous and a high degree of job satisfaction alone does not explain low rates of turnover in librarianship.

In order to have a fuller understanding of how job satisfaction and organizational commitment interact for librarians, there needs to be a deeper understanding of what the pre-entry expectations of newcomers are. If, as the LIS literature speculates, the choice of librarianship as a second career plays a role in commitment to stay, then understanding what expectations new LIS students bring with them will not only aid organizations in attracting new members, who will positively contribute to the organization’s missions and goals, but also provide the profession with an insight into what might attract potential librarians.

The human resources management and behavioural psychology literature on organizational commitment has provided LIS practitioners and researchers with a theoretical foundation upon which to build a theory of organizational commitment for librarians. The qualities of the profession that set it apart from other professions, such as the choice of librarianship as a second career, the gender makeup of the workforce, and the public service focus, to name a few, offer researchers an opportunity not only to add to the OC literature but to deepen the understanding of the profession as a whole.

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# The Future is Competencies: Competency-Based Human Resource Management in Public Libraries

Donna C. Chan

The 8Rs studies have focused attention on several issues in human resources in libraries across Canada: recruitment, retirement, retention, rejuvenation, repatriation, re-accreditation, remuneration, and restructuring. The studies paint a detailed picture of how libraries are addressing these issues and demonstrate the complexity and the inter-relatedness of the issues. It is clear that individual strategies that deal with each of these human resource issues in isolation from each other are not likely to be effective. What is needed is an overall strategic approach linking human resource management with organizational goals and objectives to optimize organizational effectiveness and enhance employee performance. Libraries have turned to competency-based human resource management systems to align their human resource practices with their organizational goals and objectives. By basing the human resource functions of recruitment, selection, appraisal, training, and succession planning on a competency model, organizations are ensuring that there is a closer connection between organizational success and individual performance.

The first 8Rs study, *The Future of Human Resources in Canadian Libraries* (8Rs Research Team, 2005), collected information on the importance of certain competencies for professional librarians. In this chapter, the data is examined in relation to core competency models adopted by several public libraries. The relevance of core competencies for managing human resources is explored. Competency-based human resource management makes competencies the foundation for the entire human resource management function. Examples from Canadian public libraries are described.

## Competencies

The term “competencies” has multiple definitions that reflect the varied history of the concept. For instance, competency is used in clinical psychology and law to denote legal standards of mental capacity, the ability to care for oneself, or the ability to function in the activities of daily living. In vocational counselling, the term describes the broad areas of knowledge, skills, and abilities associated with specific occupations. In human resources, competencies refer to groups of selected characteristics that are needed for successful job performance in an organization.

The current use of the term can be traced back to McClelland (1973) who saw competencies as components of performance associated with important life outcomes and as an alternative to the traditional trait and intelligence approaches to predicting human performance. Competencies used in this way refer to broad psychological or behavioural attributes that are related to successful outcomes, be they on the job or in life in general. Building

on this body of work, Boyatzis defined competency as “an underlying characteristic of a person which results in superior and/or effective performance in a job” (1982, p. 21). This definition is widely cited in the literature, although a group of 37 human resource professionals and industrial and organizational psychologists could not agree on a common definition (Shippmann et al., 2000).

Competencies, then, have some or all of these characteristics:

- cluster of knowledge, skills, attitudes, values, traits, and motives;
- relate to a major part of the job;
- associated with effective and/or superior performance;
- observable and measurable against well-accepted standards;
- linked to future strategic directions; and,
- can be improved via training and development (Cooper, 2000; Parry, 1996; Shippmann et al., 2000).

Competencies can be specified using a three-level framework. This consists of competencies that apply across all jobs in the organization (core competencies), those that apply to a group of similar jobs (functional competencies), and those that apply to a single class of jobs (job-specific competencies). Core competencies form the base for functional competencies, which in turn serve as the foundation for job-specific competencies. The framework may vary across organizations, with some choosing to identify only core competencies, and others developing detailed job-specific frameworks.

Core competencies for employees are those characteristics that apply to every member of the organization, regardless of their position, function, or level of responsibility (Catano, Wiesner, Hackett, & Methot, 2005). The advantage of this approach is that the competency model applies to the staff of the entire organization. There is only one framework so applications of the model are more easily implemented. All employees are assessed against the same competencies, allowing comparisons with each other. The framework can be aligned with the organization’s mission, values, and key strategies, such as client-centred focus. Only when strategies change do these core competencies need to change. Because core competencies are psychological or behavioural attributes, they include personal characteristics which are largely missing or not well described in traditional job descriptions.

Functional competencies are characteristics shared by different positions within an organization that belong to a common job group or by employees performing a common function (Catano et al., 2005). For example, the library profession has been moving to identify competencies for professional work in functional areas such as acquisitions (Fisher, 2001) and reference (RUSA Task Force on Professional Competencies, 2003); in specialized libraries such as law libraries (American Association of Law Libraries, 2001); and, serving special populations such as young adults (Young Adult Library Services Association, 1998). Job descriptions often identify specific traits that are helpful in certain jobs, such as “attention to detail” for cataloguing positions.

Job-specific competencies are characteristics that apply only to specific jobs within an organization (Catano et al., 2005). These are competencies that are associated with a position, in addition to core and functional competencies. A cataloguing assistant would require knowledge of cataloguing software and standards in use in the library, while a circulation assistant would require knowledge of the circulation system and the appropriate policies and procedures. A job description typically identifies the specific knowledge, skills, abilities or other attributes necessary for successful performance of the job.

## **Competencies in the 8Rs Studies**

A component of the 8Rs studies involved a survey of library administrators. Library managers were asked a series of questions concerning their human resource experiences. One of the questions asked administrators to rate the importance of a list of competencies when making recruiting decisions about professional librarians (8Rs Research Team, 2005, Appendix C). The rating scale ran from ‘1’ to ‘5’, with ‘1’ meaning ‘Not at all important’ and ‘5’ meaning ‘Very important.’ A subset of the 8Rs data was obtained by selecting only public libraries employing professional librarians. There were 120 public libraries in the subset, of which 25 are members of the Canadian Urban Libraries Council (CULC). Membership in CULC is used as a proxy for size and location. Generally,

libraries in large urban centres are members of CULC. There are other reasons for using this distinction which will become clear further on in the chapter.

There are 21 competencies in the 8Rs Institutional Survey. These include both functional and core competencies. Functional competencies apply only to professional librarians and include the MLIS degree, specialist and generalist skills, technology skills, and managerial skills. These are the competencies needed to successfully perform the job of librarian.

Core competencies apply to all employees in the library, not only professional librarians. These include most on the list: communication skills, interpersonal skills, ability to learn new skills, ability to respond flexibly to change, reliability, commitment to organizational goals, ability to deal with a range of users, leadership potential, ability to handle a high volume workload, innovativeness, friendliness, interest in continuing education, and logic. These competencies reflect the 'soft skills' that have gained importance in the workplace. It has been suggested that competencies such as problem solving, critical thinking, innovation, logic and planning, and organization are related to intelligence, while those of commitment to the organization, customer service, reliability, interpersonal skills, and leadership are related to conscientiousness and organizational citizenship behaviour (Hunter, Schmidt, Rauschenberger, & Jayne, 2000). These latter behaviours tend to have significant positive effects on employee performance evaluations, salary recommendations, and promotion recommendations, as well as overall organizational performance and success (Podsakoff, MacKenzie, Paine, & Bachrach, 2000).

There are some other competencies on the list that could be considered either a core or functional competency. It could be argued that managerial skills, entrepreneurial skills, dedication to the profession, and interest in contributing to the profession are all necessary to some degree or other in all employees. Employees today are expected to manage their time and their workload, to develop a business-oriented approach to library work, and to develop themselves. On the other hand, professional librarians are highly likely to become library managers and leaders so these competencies would be more likely to apply to them in their professional positions.

Table 1 shows the average ranking of the importance of the competencies in the Institutional Survey for CULC and non-CULC libraries. All 21 competencies were considered 'Important' (rating of 3) or higher by public library administrators. The competencies are listed in decreasing order of importance as ranked by the administrators of CULC-member libraries. Communication skills and interpersonal skills were the top ranked competencies for all libraries. At the bottom of the list was entrepreneurial skills which, on average, were only considered 'Important' by both CULC and non-CULC libraries.

**Table 1. Average ranking of importance of competencies, CULC and Non-CULC libraries**

	<b>CULC Libraries N=25</b>	<b>Non-CULC Libraries N=95</b>
<b>Competency</b>	<b>Average ranking</b>	<b>Average ranking</b>
Communication skills**	4.96	4.68
Interpersonal skills	4.92	4.79
MLIS degree	4.83	4.51
Ability to learn new skills	4.64	4.42
Technology skills**	4.64	4.20
Ability to respond flexibly to change	4.60	4.57
Reliable	4.56	4.65
Commitment to organizational goals*	4.54	4.32
Generalist skills	4.48	4.29
Ability to deal with a range of users	4.40	4.51
Leadership potential	4.40	4.21
Friendliness	4.32	4.51
Ability to handle high volume workload	4.28	4.31
Innovative	4.25	4.20
Interest in professional development/Continuing education	4.13	3.98
Logical	4.04	4.19
Dedication to the profession	4.04	3.90
Specialist skills	4.00	4.40
Managerial skills	4.00	4.27
Interest in contributing to the profession	3.63	3.58
Entrepreneurial skills	3.36	3.41

Source: 8Rs Canadian Library Human Resource Institutional Survey

\*\* p<.01; \* p<.05

Because the data for each competency are ranks (i.e., ordinal data), a Mann-Whitney test was carried out for each competency. The null hypothesis for this test is that there is no difference in the distribution of responses between CULC and non-CULC libraries. In other words, all libraries rate the importance of the competency at the same level. In only three cases was the null hypothesis rejected. The CULC and non-CULC libraries differed in their ratings of communication skills (p<.01), technology skills (p<.01), and commitment to organizational goals (p<.05). For each of these competencies, the CULC libraries showed a higher average rating than did the non-CULC libraries, although both sets of libraries showed an average rating of ‘somewhat important’ (4) or higher.

Essentially, the statistical tests show that for most of the 21 competencies, they are rated in the same way by public library administrators, regardless of the size or location of their library. Most research studies concentrate on reporting significant results and emphasize differences between populations or variables. In this case, it is important that there are *no* significant differences in the rankings of the competencies between larger, urban public libraries and all other public libraries. This shows that, among public library administrators, there is a consensus about the qualities and characteristics needed for professional work. This has implications for the most widely used form of competency-frameworks in public libraries in Canada: core competencies.

### **Core Competencies in Canadian Public Libraries**

Based on a survey of public libraries in Canada, a set of eleven core competencies commonly used in more than one public library have been identified (Chan, 2005, 2006). The libraries using core competencies were all members of CULC (more specifically, its predecessor, the Canadian Association of Large Urban Public Libraries). The

eleven core competencies are described below, together with a few representative descriptive phrases taken from the libraries' own definitions of the competency:

- *Communication skills* typically include written and oral communication skills, with emphasis on active listening and providing feedback: e.g., listens effectively and actively to both staff and clients; demonstrates good understanding and command of English grammar, both written and oral; aware of others' non-verbal cues.
- *Interpersonal skills* focus on relationships with others, including working cooperatively, sharing knowledge, and being respectful: e.g., participates willingly and productively as a team member; treats others with respect and their views with empathy; handles interpersonal conflict effectively.
- *Customer service* stresses responsiveness to internal and external customers, politeness, courteousness, and sensitivity to diversity among customers: e.g., demonstrates a commitment to service excellence; is friendly, polite, and approachable to all clients; respects diversity.
- *Analytical skills* involve judgement, decision-making skills, and recognizing when guidance is needed: e.g., works well with others in solving problems; considers alternatives; grasps the big picture.
- *Accountability* refers to taking responsibility for actions and results including time management, reliability, and punctuality. This competency is closely related to that of planning and organizing skills: e.g., takes responsibility for actions/mistakes; uses resources effectively/efficiently; accomplishes goals, completes tasks, and meets deadlines.
- *Adaptability* focuses on the employee's ability to handle change and to cope with uncertainty in a positive way: e.g., embraces new roles and responsibilities; open to change; flexible.
- *Technological competence* refers to demonstrated levels of technological expertise and ability to learn new technologies: e.g., enjoys learning and applying new technologies; makes appropriate and efficient use of relevant PC, internet, and library system applications; able to transfer knowledge.
- *Planning and organizing skills* include being able to set priorities, meet goals and deadlines: e.g., plans and organizes for positive results; organizes work flow and sets priorities as applicable; makes effective use of available time and other resources.
- *Knowledge of the organization* means that employees are required to be knowledgeable about the mission, policies, and procedures of the organization, as well as committed to the organization's mission: e.g., applies policies and procedures fairly; supports organizational goals and policies; demonstrates an understanding of the organization.
- *Creativity/Innovation* includes initiative and promoting new ideas: e.g., action oriented; experimental; self-motivated.
- *Leadership* may be identified as a core competency for all employees or as a core competency for professional and managerial employees only. In these libraries, Leadership refers to setting an example through high performance standards and ensuring achievement of strategic objectives: e.g., takes every opportunity to share expertise and knowledge with co-workers; establishes and demonstrates high performance standards; respects and trusts others.

There are some 'Other' competencies that are unique to a library, such as *Health and safety*, *Business skills*, and *Change management*. Health and safety is concerned with maintaining a safe workplace; business skills are concerned with the operational and financial side of the organization; and, change management is similar to adaptability, but includes initiating change. Some libraries highlighted *Diversity* and *Continuous learning* in their own categories.

Table 2 shows 14 of the competencies used in the 8Rs study matched to the eleven core competencies used in public libraries. For example, the core competency of *Customer service* includes "Ability to deal with a range of users" and "Friendly," two competencies on the 8Rs survey. Descriptions of *Technological competence* often included statements about learning new technologies. In Table 2, 8Rs competencies dealing with learning are included under this term. As noted earlier, at least one library identified a unique competency termed *Continuous learning*.



**Table 2. Comparison of selected competencies, 8Rs Institutional Survey and Core Competencies**

<b>Core Competency</b>	<b>8Rs Competency</b>
Communication	Communication skills
Interpersonal skills	Interpersonal skills
Customer service	Ability to deal with a range of users Friendly
Analytical skills/Planning & Organizing	Logical
Accountability	Reliable Ability to handle high volume workload
Adaptability	Ability to respond flexibly to change
Technological competence	Technology skills Ability to learn new skills Interest in professional development/ Continuing education
Knowledge of organization	Commitment to organizational goals
Creativity/Innovation	Innovative
Leadership	Leadership potential

Given that the previous analysis has shown that, for all intents and purposes, all types of public libraries rated the competencies in the 8Rs study in the same way, it can be argued that the core competencies in use in large libraries can be applied in all public libraries. A comprehensive approach to human resource management based on core competencies is feasible in all types and sizes of public libraries.

### **Competency-based Human Resource Management**

Competency-based human resource (HR) management involves identifying the competencies that distinguish high performers from average performers in all areas of organizational activity and using this framework to improve the processes of recruitment and selection, training and development, and other aspects of employee management (Horton, 2000). The benefits for human resources from using this approach include improved recruitment and selection practices through a focus on core competencies; improved individual and organizational training and development programs; improved performance management processes due to clearer assessment; and improved communication on strategic and HR issues through a common language (Markus, Cooper-Thomas, & Allpress, 2005). The benefits for the organization are increased productivity, positioning the organization for future growth; facilitating culture change and transformation; and improved workforce flexibility (Dubois & Rothwell, 2004).

Examples of how core competencies are being applied in HR processes are drawn from a study of the development and implementation process of core competencies in eight public libraries and a case study of the use of core competencies in one library.

#### **Competency Identification**

Organizations adopting a competency approach must first develop a competency framework. In line with the myriad definitions of 'competency,' there are no standardized methods for identifying competencies. The two most popular methods are the behavioural event interview and the competency menu method (Dubois & Rothwell, 2004). The behavioural event interview technique involves interviewing employees to obtain a detailed account of how the workers actually perform their jobs. The data are examined to identify the competencies that separate the superior performers from others (Catano et al., 2005). This can be a resource-intensive and time-consuming project. The menu method relies on competency lists obtained from other organizations, books and articles, or consultations with staff. This has the advantage of speed and lower costs, but the validity and reliability of the resulting competency model may be affected.

Most public libraries in the study used the menu approach under the guidance of a team. The team reviewed the literature, obtained competency models from other libraries or organizations, and developed an initial list. The composition of the team varied from management only, to committees with representation from all levels of the hierarchy. There were usually consultations with supervisory staff during the development process which resulted in revisions to the list. When approved by management and the library board, the competencies were introduced to staff.

The process of development usually originated with the senior management team. In one case, the parent municipality was using core competencies for performance management with managers and it was found to be so effective that the effort was made to introduce core competencies for all employees in the library. In another library, the need for succession planning and HR planning was the primary reason for adopting core competencies. These were seen as important criteria for identifying potential replacements throughout the organization.

The number of competencies in the frameworks ranged from five to fourteen. It has been suggested that six or seven competencies account for most of the differences between average and superior performers (Bethell-Fox, 1992). A study of organizations in the UK found that the majority of organizations used ten competencies or fewer. A quarter used between three and five, and a similar percentage used between six and nine (Pickett, 1998). Too many competencies produces a complex model which is too cumbersome to use.

In all libraries, core competencies are being used for performance management. Employees are evaluated against the core competencies in the performance evaluation process. Many of the libraries are also using core competencies to recruit and select employees. Some libraries are also using core competencies to determine training needs. The ways in which competency frameworks are used in public libraries in human resource management functions are described below.

### **Performance Management**

A competency-based performance management system is a formalized way of establishing the skills and behaviours that employees need to be successful in their jobs (Martone, 2003). Performance expectations are predicated on the core competencies, and performance monitoring and review discussions are related to the competencies. The formal performance appraisal includes measures and assessments of actual performance against the standards of the core competencies.

Employees are evaluated against the core competencies. The rating systems range from a simple 'Meeting/Not meeting expectations' to a four-category system of 'Results unsatisfactory,' 'Results usually meet expectations,' 'Results consistently meet expectations,' and 'Results exceed expectations,' with specific examples illustrating the criteria for each rating category. Table 3 shows an example of an appraisal form based on the core competency of customer service. The definition of "Customer Service Orientation" is shown at the top of the form. Under each of the possible ratings, examples of the behaviour are given. Only two behavioural examples are shown. The appraisal form used by this library lists about six or seven performance indicators. In most libraries, an unsatisfactory performance rating results in an action plan to improve performance. The action plan is usually a written agreement, collaboratively developed between the manager and employee. It includes specific goals and objectives for each area for improvement, recommended training or other support needed to assist the employee, and timelines for improvement. Managers are expected to follow-up with the employee to ensure that objectives are met.

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**Table 3. Example of Competency-based Performance Appraisal Form****Customer Service Orientation**

**Definition:** Understands service objective. Understands and meets the needs of internal and external customers. Recognizes the variety of customers in the community and at all levels of the organization and effectively accommodates their diverse needs.

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**Results Unsatisfactory**

- Generally does not demonstrate appreciation of, and commitment to, service objectives
  - Usually does not ensure customer-service problems and enquiries are addressed promptly, respectfully, and appropriately
- 

**Results Usually Meet Expectations**

- Generally demonstrates appreciation of, and commitment to, service objectives
  - Usually ensures customer-service problems and enquiries are addressed promptly, respectfully, and appropriately
- 

**Results Consistently Meet Expectations**

- Demonstrates appreciation of, and commitment to, service objectives
  - Ensures customer-service problems and enquiries are addressed promptly, respectfully, and appropriately
- 

**Results Exceed Expectations**

- Demonstrates exceptional appreciation of, and commitment to, service objectives
  - Is exceptional at ensuring customer-service problems and enquiries are addressed promptly, respectfully, and appropriately
- 

**Training and Development**

The benefits of a competency-based training and development system are that it enables the organization to focus on relevant behaviour and skills, and that it makes the most effective use of the training system (Lucia & Lepsinger, 1999). Training efforts can be concentrated on those skills that have been deemed essential for the organization's strategic direction. In addition, training dollars do not need to be allocated for skills that all employees are expected to have already obtained. The onus for training and development shifts from the organization to the employee, who is expected to demonstrate and maintain the competencies.

Competencies, however, differ in the extent to which they can be taught or developed. Competencies include motives, traits, attitudes and values, skills, and knowledge. Motives are unconscious thoughts and preferences that drive behaviour; traits are stable characteristics which distinguish personal character; attitudes and values are preferences which influence choice; skills are the ability to do specific tasks; and, knowledge is the information a person knows in a particular area. Knowledge and skills are easiest to teach, while altering attitudes and values is more difficult. The competencies that truly differentiate between average and superior performers, such as motives and traits, are the most difficult to change (Lash & Jackson, 1998). A recent study found that motives and traits were perceived by trainers to be the most difficult to change or develop, while knowledge and skills are the easiest to change (Maurer, Wrenn, Pierce, Tross, & Collins, 2003). Hence, it is important that selection processes reliably identify candidates with core competencies that are motives or traits.

Initially, on the introduction of core competencies, one library trained all staff in a particular competency, such as customer service, to ensure that everyone in the organization had that competency. If, through the performance appraisal process, an employee is found to lack a competency, training is provided. New employees are not considered to need training, since the selection process determined that they already possess the competency at a minimum standard. Ongoing training may be needed to further develop the competencies, but not immediately.

**Recruitment and Selection**

Competency models increase the likelihood of hiring employees who will succeed in the job, in addition to identifying candidates who will not perform well. Recruitment efforts are aimed at attracting an adequate pool of qualified applicants. Recruitment material that communicates the values, mission, and vision of the library encourages exemplary applicants to want to work for the library. The core competencies are part of the job requirements and should appear in plain language in the job posting.

Selection is the process of choosing individuals with the relevant qualifications to fill vacant positions. Because the list of core competencies often includes many soft skills not amenable to training, there is an increased emphasis on selection. The selection process should be structured to focus on the core competencies, as well as the specific

technical skills that are required for the job (Lucia & Lepsinger, 1999). A structured interview uses a set sequence of questions for each candidate. The members of the interview panel use a common rating guide to assess the candidate's answers.

A variety of selection tools are used in the interview. Behavioural questions focus on candidates' past performance, assuming that the best predictor of future performance is past performance in similar circumstances. For less experienced candidates, particularly new entrants, questions can focus on their experiences in previous unrelated jobs or volunteer positions. Work samples measure job skills using actual performance of tasks similar to those performed on the job. If the position involves instruction or presentations, have the candidate make a presentation to the interview panel in order to demonstrate his/her communication and instructional skills. One library found that in assessing communication skills, it was important to test writing skills as well as oral communication skills.

Reference checks are used to verify information about the candidate's previous employment, academic credentials or other background details, but are suspect when used to predict future performance. The selection process should focus on the work to be performed by the successful candidate, the relationship of his or her experience to the work, and the competencies presented by the candidate to be used in producing the expected results.

### **Other Human Resource Functions**

Employee development activities are an important tool in responding to the challenges of employee retention. These activities lead to continuous learning and personal growth, in the long run contributing to both individual and organizational objectives. In these days of flattened hierarchies, opportunities for promotions can be rare, while transfers can provide possibilities for personal or career enrichment. In unionized workplaces, decisions for promotions and transfers may depend on seniority. However, some collective agreements allow for competencies to be taken into account, particularly if the core competencies are considered part of the position requirements. In one library, at the time of initial implementation of core competencies, staff were told that their employment was assured even if they did not possess all the competencies. However, their eligibility for promotion or transfer was contingent on acquiring and demonstrating the competencies.

The organization benefits from long-term development of employees. The competency development needs of employees can be noted through the performance appraisal process. Competency-based succession planning enables an organization to determine potential successors for key management positions based on the critical competencies necessary for success in those jobs. Candidates who have high potential can be identified and specific developmental plans can then be formulated to build upon these competency requirements.

Compensation is an important component of human resource management. Having individuals demonstrate that they possess the core competencies is a first step, but they must also be motivated to perform at an exemplary level. Pay is a powerful motivating tool. A recent review of research on the effect of pay on employee motivation noted that productivity significantly increased in response to pay incentives (Rynes, Gerhart, & Minette, 2004). Linking the display of competency to pay makes sense. However, this is a very complex and technical topic that cannot be adequately addressed in this chapter. In unionized libraries, compensation is negotiated through the collective bargaining process. In non-unionized libraries, pay may be set by the parent municipality. In other words, public libraries are unlikely to be able to introduce competency-based pay as part of their overall human resource management strategy. Needless to say, no library in the study had introduced competency-based pay.

### **Criticisms of Competencies**

The benefits claimed for competency-based human resource management are many: increased productivity, facilitating culture change and transformation, increasing financial performance, improving customer service, empowering staff, and promoting learning, flexibility, and adaptability among staff, all of which contribute to enhanced organizational success (Dubois & Rothwell, 2004). However, there are some key issues associated with the use of competency models that still need to be studied.

Competency models are one way of identifying the skills, knowledge, and attitudes necessary for a job. Traditionally, jobs have been described using job analysis to determine the tasks, duties, and responsibilities of

each job. Job analysis is characterized by established, rigorous, and reliable methods of gathering and analyzing data about jobs. The product of a job analysis is usually a job description — a list of duties, responsibilities, reporting relationships, and working conditions of a job — and a job specification — a list of the requisite knowledge, skills, and abilities needed to perform the job (Dessler, Cole, & Sutherland, 2005). The job descriptions and job specifications are then used in human resource functions.

In a comparison with traditional job analysis methods, competency modeling approaches were found lacking in rigour on nine of ten variables (Shippmann et al., 2000). The variables included such factors as effective data collection methods, competency descriptor development procedures, links to business strategy, validation procedures, and documentation. The only criterion where competency modeling was seen to be superior was with respect to a more transparent linkage to business goals and strategy. In addition, competency approaches were found to focus on generic personal characteristics and organizational fit. This gave the competency approach higher face validity. Face validity means that the competencies themselves were judged accurate and appropriate by their users. The lack of rigour, and the sheer impossibility of identifying all competencies required for an organization, undermine the content validity of competency models. Content validity means that the descriptors are representative of the competencies.

Another criticism centres on the fact that many competency models include traits, motives, attitudes, and values that cannot be measured easily nor are they easily changed. It is often argued that competencies should only reflect knowledge, skills, and attitudes that can be learned through training, and that competency models should only be used for development purposes, not appraisal purposes (Cooper, 2000; Parry, 1996).

The use of competency models for performance management is generally not advised in the literature. One argument is that the level of rigour and documentation underlying most competency models would not stand up under a legal challenge (Shippmann et al., 2000). A second argument is that although competency underpins superior performance, measuring performance is not the same as measuring competency (Cooper, 2000). In measuring performance against the competency model, the degree to which the employee demonstrates the competency on the job is assessed. Employees must possess the competency in order to perform the job well, but simply having the competency does not necessarily translate into superior performance. Many factors affect performance, not only competency. Another argument is that many competencies are defined in very broad terms and with few performance indicators. As a result, it is unlikely that accurate evaluation is possible (Markus et al., 2005).

Finally, the link between competencies and improved performance is tenuous. There has been a notable lack of empirical research into the effectiveness of competency models. Much of the evidence presented in support of the use of competency models is anecdotal. For example, Pickett claims that “results of managerial competency programs include an improvement in staff performance and achievement, an increase in staff motivation, development of a more flexible and highly skilled workforce, higher levels of customer service and improved quality levels” (1998, pp. 105–6). Certainly, the complexity of the factors underlying individual performance, much less organizational performance, makes it difficult to isolate the effect of competencies on performance. Others have argued that the causal relationship may run the other way; that is, people may have higher competencies because the organization is more effective (Schneider, Hanges, Smith, & Salvaggio, 2003).

## **Conclusion**

This chapter started by looking at the importance of competencies that were part of the 8Rs Institutional Survey of public library administrators in Canada. It was found that size and location of library, as indicated by membership/non-membership in the Canadian Urban Libraries Council, were not significant. Thus it was suggested that the core competencies that are in use in some CULC-member libraries are relevant to all public libraries. A brief overview of competency-based human resource management was presented, illustrated by examples from public libraries using such systems. Competency-based human resource management will not solve all the human resource issues facing public libraries, but promises to bring a co-ordinated, person-centred approach that is tied to organizational goals and strategies to resolve some of these issues.

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# Senior Administrators in Canadian Libraries: A Profile

Marianne Sorensen, Phd

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## Introduction

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The 8Rs Research Team's reports contained a wide range of information profiling Canadian librarians and paraprofessionals at various stages of their careers. These documents highlighted the characteristics and experiences of new professional librarian recruits and, to some extent, those of mid-level and senior staff. To date, however, Canadian library top administrators such as chief librarians, head librarians, and other CEO positions (i.e., those first in command) and deputy/assistant heads, directors, or regional heads (i.e., those second in command) have received very little serious research attention. Much of the literature discusses the changing role of senior administrators at the anecdotal level and only a few studies quantify the leadership and management attributes of senior administrators as part of succession planning (for academic libraries, see Hernon, Powell, & Young, 2002 and Suwannarat, 1994. There is thus a notable gap in the literature on senior administrators that is data-based, Canadian, and covers all library sectors. The purpose of this paper is to paint a detailed profile of senior administrators working in all types of Canadian libraries. (For the purposes of this paper, senior administrators are defined as respondents to the 8Rs Canadian Library Human Resource Practitioners' Survey who indicated they were currently working as a chief or head librarian, a director or CEO or a deputy/assistant head, chief, or director or a regional head.)

Since senior administrators are, on average, older than other staff, they are the most likely group to be retiring in the near future, and therefore one of the most important library staff members to examine in terms of retirement and succession planning. Replacing senior administrators, however, first requires a thorough understanding of who these individuals are, what they do, and, for the purposes of attracting staff to positions, how they view the quality of their work and work environment. A more comprehensive understanding of this essential senior workforce can inform efforts to recruit replacements and to groom existing employees to be the future leaders of the Canadian library sector. From an individual perspective, highlighting the characteristics and work tasks of senior administrators might help those interested in pursuing a top administrative position establish achievement goals.

Data are drawn from the 8Rs Canadian Library Human Resource Practitioners' Survey conducted in 2004. Most analyses are done by library sector and sub-sector. When appropriate, comparisons are also made between senior administrators and professional librarians. Finally, since senior administrators are comprised of both MLIS and non-MLIS graduates, comparison between these two credential groups will be made, again when appropriate and applicable.



## Library Sector Sample Size

Of the 4,697 respondents, 592 (12.6%) were working as senior administrators in a Canadian organization at the time of the survey. As shown in Table 1, the largest proportion of administrators work in the public sector (42%), primarily “other public” (32%). Academic senior administrators comprise the second largest group (27%), split equally between CARL (14%) and “other academic” (13%) libraries. Special libraries represent 23% of all administrators, and school libraries just 8%. These sector distributions are important to keep in mind when examining the total sample results in the remainder of this paper.

**Table 1: Senior Administrator<sup>1</sup> Sample Size by Library Sector**

Library Sector	Number of respondents	% Distribution
<b>TOTAL</b>	<b>567<sup>2</sup></b>	<b>100</b>
<b>TOTAL ACADEMIC</b>	<b>151</b>	<b>27</b>
Other Academic	74	13
<b>TOTAL PUBLIC</b>	<b>240</b>	<b>42</b>
CULC	60	11
Other Public	180	32
<b>TOTAL SPECIAL<sup>3</sup></b>	<b>130</b>	<b>23</b>
Government	52	9
Non-profit	50	9
For-profit	25	4
<b>SCHOOL</b>	<b>46</b>	<b>8</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

<sup>1</sup> Senior Administrator includes individuals indicating they worked as a “Senior Administrator,” including head librarian, chief librarian, director, CEO or deputy/assistant head, chief, director, regional head.

<sup>2</sup> Sample excludes 25 respondents not providing library sector information.

<sup>3</sup> Sector numbers do not add up to sub-sector total because “Total Special” includes 3 individuals working in the non-traditional library sector, such as library consulting firm, vendor, distributor.

## Demographic and Work Characteristics

As shown in Table 2, roughly 8 in 10 senior administrators are female. This is virtually the same gender makeup for professional librarians. Notably, however, females comprise a smaller portion of CARL, other academic, and CULC senior administrators, while other public, government, non-profit, and school senior administrators are slightly more likely to be female than their professional librarian counterparts. Hence, while female representation is higher in the library sector than in most other occupations at all career levels, women are less likely to be found heading up the largest libraries in the country.

**Table 2: Percent Senior Administrators and Professional Librarians Female by Library Sector**

Library Sector	Percent	
	Senior Administrators <sup>1</sup> (n=527)	Professional Librarians (n=1,609)
<b>TOTAL SAMPLE</b>	<b>79</b>	<b>81</b>
<b>TOTAL ACADEMIC</b>	<b>63</b>	<b>77</b>
CARL	59	76
Other Academic	67	80
<b>TOTAL PUBLIC</b>	<b>83</b>	<b>85</b>
CULC	72	86
Other Public	86	81
<b>TOTAL SPECIAL</b>	<b>86</b>	<b>83</b>
Government	87	81
Non-Profit	89	85
For-Profit	82	89
<b>TOTAL SCHOOL</b>	<b>89</b>	<b>86</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

As Table 3 displays, fully one-third of Canada's library senior administrators are 55 years of age and older. Compared to professional librarians, senior administrators are, as expected, older (mean age of 50 versus 48). As was the case for gender, CARL, other academic, and CULC administrators are, on average, older. Hence, compared to those in other library sectors, those running the largest academic and public libraries are more likely to be older and male.

**Table 3: Age of Senior Administrators<sup>1</sup> and Professional Librarians by Library Sector**

Library Sector	Percent					
	Senior Administrators <sup>1</sup> (n=516)			Professional Librarians (n=1,525)		
	< 45	45-54	55+	< 45	45-54	55+
<b>TOTAL SAMPLE</b>	<b>23</b>	<b>43</b>	<b>34</b>	<b>39</b>	<b>39</b>	<b>22</b>
<b>TOTAL ACADEMIC</b>	<b>16</b>	<b>44</b>	<b>40</b>	<b>38</b>	<b>36</b>	<b>26</b>
CARL	12	48	40	35	37	28
Other Academic	20	40	40	45	34	21
<b>TOTAL PUBLIC</b>	<b>27</b>	<b>41</b>	<b>32</b>	<b>37</b>	<b>44</b>	<b>19</b>
CULC	17	45	38	36	47	17
Other Public	29	40	31	40	33	27
<b>TOTAL SPECIAL</b>	<b>19</b>	<b>47</b>	<b>34</b>	<b>45</b>	<b>34</b>	<b>21</b>
Government	16	48	36	40	36	24
Non-Profit	27	42	31	49	36	15
For-Profit	10	52	38	58	25	17
<b>TOTAL SCHOOL</b>	<b>37</b>	<b>42</b>	<b>21</b>	<b>67</b>	<b>11</b>	<b>22</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

<sup>1</sup> Senior Administrator includes individuals indicating they worked as a "Senior Administrator," including head librarian, chief librarian, director, CEO or deputy/assistant head, chief, director, regional head.

An interesting effect of the requirement for professional librarians to have an MLIS degree is that in some instances the highest ranking staff will have lower levels of education than professional librarians. As shown in Table 4, nearly one-third of senior administrators have an educational attainment level below that of their professional librarian staff members (i.e., 32% with less than a master's level degree). Notably, 36% of senior administrators without an MLIS expressed an interest in obtaining one, suggesting that this educational background is viewed by some as a necessary asset to administering a library.

**Table 4: Educational Profile of Senior Administrators<sup>1</sup> and Professional Librarians**

	Percent	
	Senior Administrators (n=527)	Professional Librarians (n=1,609)
<b>TOTAL SAMPLE</b>	<b>100</b>	<b>100</b>
<b>No MLIS</b>	<b>36</b>	<b>0</b>
High School	6	-
Postsecondary Certificate/ Diploma	12	-
Bachelor Degree	14	-
Master's Degree (not MLIS)	3	-
PhD	1	-
<b>MLIS</b>	<b>64</b>	<b>100</b>
MLIS + Other Masters	15	17
MLIS + Phd	1	1

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

Indeed, an MLIS is a commonly-held degree among senior administrators at some of the largest libraries in the country. MLIS degrees are most common among both types of academic administrators (92% and 81%, respectively) and CULC administrators (80%), suggesting that previous experience as a professional librarian is a typical avenue towards senior administrative status in these larger libraries. Nonetheless, with 100% of professional librarians having an MLIS in these libraries, there are instances where senior administrators will have lower levels of educational attainment than their staff. Since school library senior administrators are the least likely of all sectors to have earned an MLIS (17%), this situation is most likely to occur in this sector. Overall, however, the lowest levels of educational attainment are found among other public senior administrators, fully 16% of whom do not have any post-secondary credentials.

**Table 5: Educational Attainment of Senior Administrators<sup>1</sup> by Library Sector (n=564)**

Library Sector	Percent						
	Total Percent	High School	PS Cert./Dip.	B.A.	Other M.A. <sup>2</sup>	MLIS	Ph.D.
<b>TOTAL SAMPLE</b>	<b>100</b>	<b>6</b>	<b>12</b>	<b>14</b>	<b>4</b>	<b>62</b>	<b>2</b>
<b>TOTAL ACADEMIC</b>	<b>100</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>2</b>	<b>87</b>	<b>4</b>
CARL	100	0	0	4	0	92	4
Other Academic	100	0	0	10	4	81	5
<b>TOTAL PUBLIC</b>	<b>100</b>	<b>13</b>	<b>18</b>	<b>11</b>	<b>1</b>	<b>56</b>	<b>&lt;1</b>
CULC	100	6	5	5	2	80	2
Other Public	100	16	22	13	1	48	0
<b>TOTAL SPECIAL</b>	<b>100</b>	<b>2</b>	<b>11</b>	<b>16</b>	<b>3</b>	<b>68</b>	<b>0</b>
Government	100	2	10	11	2	75	0
Non-Profit	100	2	14	20	6	58	0
For-Profit	100	4	8	16	0	72	0
<b>TOTAL SCHOOL</b>	<b>100</b>	<b>2</b>	<b>20</b>	<b>46</b>	<b>15</b>	<b>17</b>	<b>0</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

<sup>1</sup> Senior Administrator includes individuals indicating they worked as a "Senior Administrator," including head librarian, chief librarian, director, CEO or deputy/assistant head, chief, director, regional head.

<sup>2</sup> "Other M.A." excludes individuals who have an MLIS.

Length of time worked at current organization does not differ much between senior administrators and professional librarians. However, senior administrators are more likely than librarians to have worked longer in their *current position*; while 73% of senior administrators have been in their current position for more than 10 years, just 63% of professional librarians have done so.

On average (mode), full-time senior administrators earn a median of \$70,000/year compared to librarians who average \$56,000/year, and 28% are covered by a collective agreement (compared to 72% of professional librarians).

Very few differences are detected between senior administrators with an MLIS and professional librarians in their reasons for choosing the profession. Both groups were most likely to highlight the quality of the work environment as a main reason for entering the profession (59% and 56%, respectively), followed by the fact that they felt it was a good fit with their personality, skills, interests, and experience (48% for both groups).

1. What proportion of current Senior Administrators will need to be replaced in the future?

- Estimated retirement rates in the future (2013) of senior administrators.

Assuming age of retirement is 62 years,

- Senior Administrators
  - 48% estimated to retire by 2014
- Professional Librarians
  - 37% predicted to retire by 2014

**Table 6: Estimated Retirement Rates of Senior Administrators<sup>1</sup> and Professional Librarians by Library Sector**

Library Sector	Percent	
	Senior Administrators <sup>1</sup> (n=516)	Professional Librarians (n=1,525)
	Retirements by 2014	Retirements by 2014
<b>TOTAL SAMPLE</b>	<b>48</b>	<b>37</b>
<b>TOTAL ACADEMIC</b>	<b>57</b>	<b>39</b>
CARL	56	41
Other Academic	58	36
<b>TOTAL PUBLIC</b>	<b>43</b>	<b>34</b>
CULC	53	32
Other Public	40	38
<b>TOTAL SPECIAL</b>	<b>50</b>	<b>33</b>
Government	55	35
Non-Profit	49	31
For-Profit	43	29
<b>TOTAL SCHOOL</b>	<b>37</b>	<b>75</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

These data signal the importance of immediately grooming existing staff for senior administrator positions. The current findings, in combination with previous 8Rs results, also show that succession-planning becomes increasingly critical as one moves up the career ladder. While professionals were predicted to retire at higher rates than paraprofessionals (8Rs Research Team, 2005), it is estimated that senior administrators will retire at higher rates than professional librarians.

In addition,

2. What are the retirement plans of senior administrators?
3. What is the extent to which senior administrators look forward to retirement and their level of willingness to accept early or delayed retirement?
  - Overall, retirement plans and attitudes of senior administrators and senior professional librarians are very similar.
  - 8% of senior administrators, compared to 6% of professional librarians, indicated they plan to retire after 65 years of age.
  - Very similar proportions of senior administrators and professional librarians are looking forward to retirement at least to some extent (86% compared to 85%).
  - Senior administrators are slightly less likely than librarians to indicate that they would consider delaying their retirement (71% compared to 75%).

**Table 7: Retirement Plans of Senior Administrators and Professional Librarians (Among those 50 years of age and older)**

Library Sector	Percent	
	Senior Administrators <sup>1</sup> (n=259)	Professional Librarians (n=624)
<b>TOTAL SAMPLE</b>		
<b>Planned Age of Retirement</b>		
Before 65	72	69
At 65	20	25
After 65	8	6
<b>Would Consider Delaying Retirement</b>	<b>71</b>	<b>75</b>
<b>Looking Forward to Retirement</b>		
To a great extent	29	28
To some extent	57	57
To no extent	14	15

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

4. What do senior administrators do?

- Profile of dominant job tasks. For example, to what extent are top administrators performing leadership roles?

**Table 8: Percentage Of Senior Administrators and Professional Librarians “Often” or “Frequently” Performing Job Function<sup>1</sup>**

	Senior Administrators <sup>1</sup>	Professional Librarians
<b>JOB FUNCTION</b>		
<b>I COLLECTIONS</b>		
Collection development, evaluation, and management	60	62
Copyright clearance	8	4
Electronic licensing	18	9
Digitization of collections	10	5
<b>II PUBLIC SERVICE AND OUTREACH</b>		
Reference, information service, and research support	48	69
Adult programming, reference, readers advisory, information, and research	36	52
Teens programming, reference, readers advisory, information and research/ homework support	21	25
Children's programming, reference, readers advisory, information and homework support	20	17
Instructions in library use, resource & research	41	56
Programming & services to special populations (e.g. workplace employees, people with disabilities)	17	16
Liaison activities (e.g. with individual faculty, assigned departments, community groups or agencies)	55	45
<b>III TECHNICAL &amp; BIBLIOGRAPHIC SERVICES (Paraprofessionals more likely to perform all)</b>		
Cataloguing, database management, and organization of information resources (including metadata schemes and Online Public Access Catalogues (OPACs))	31	27
Creation and maintenance of bibliographic records	21	20

**Table 8 continued**

	Senior Administrators <sup>1</sup>	Professional Librarians
<b>JOB FUNCTION</b>		
Processing interlibrary loan requests	21	9
Acquisition, receipt, and payment of library materials	40	14
Circulation and discharge of library materials	32	15
Sorting, shelving, and filing of library materials	23	8
Bindery and materials processing	15	4
Repair and conservation of library materials	14	3
<b>IV INFORMATION TECHNOLOGY</b>		
Library systems, hardware, and software support	32	19
Network management and technical support	20	8
Web development and applications	20	20
Database creation and maintenance(e.g. OPACs)	19	16
<b>V PROFESSIONAL DEVELOPMENT / PARTICIPATION (Librarians more likely to participate in all)</b>		
Participation in professional organizations	55	39
Attendance at conferences and workshops	56	40
Research and publishing in the field of librarianship	9	7
<b>VI ADMINISTRATION &amp; MANAGEMENT (Librarians more likely to perform vast majority)</b>		
Training and development	55	42
Managing library units/activities	83	49
Supervision and evaluation of personnel	79	45
Organizational planning and decision-making	93	51
Policy development	85	40
Human resources planning and management	75	26
Budgeting and financial management	86	32
Managing space, facilities, and building operations	71	26
Fundraising and donor support	36	4
Marketing and public relations	59	21

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

<sup>1</sup> Based on "4" and "5" responses on a 5-point scale with "1" meaning "never" and "5" meaning "frequently" to the question: "Please indicate how often you perform the following job functions?"

5. What do senior administrators like and dislike about their jobs?

- Analysis of job satisfaction including correlates of extrinsic (e.g., pay, benefits, and job security) and intrinsic (e.g., respectful relationships; rewarding, interesting, and participatory job) benefits and work conditions generally.

Job Satisfaction/Dissatisfaction Determinants:

**Table 9: Percentage Of Senior Administrators and Professional Librarians “Often” or “Frequently” Performing Job Function**

	Satisfied	Not Satisfied	% Difference
<b>EXTRINSIC BENEFITS</b>			
Feel certain job will continue*	80	48	32
Earn a fair salary	76	52	24
Receive adequate benefits*	78	59	19
<b>INTRINSIC BENEFITS</b>			
Treated with respect by my superiors*	90	57	47
Job is Challenging*	94	74	20
Job environment is dynamic and changing	83	59	14
Allows me to grow and learn new skills	90	77	13
Provided with opportunities to advance career	53	41	12
Allows task variety	97	92	5
<b>MANAGEMENT / SUPERVISION / LEADERSHIP ACTIVITIES</b>			
Allows me to participate in overall library strategy	94	73	21
Allows me to participate in decisions about my area	94	73	21
Allows me to seek out new project opportunities	87	68	19
Allows me to perform a leadership role	93	80	13
Allows me to motivate others	88	82	6
Allows me to manage a service or department	87	82	5
Allows me to supervise others	84	85	-1
<b>WORKLOAD / WORK STRESS</b>			
Can balance work with family/personal life*	61	38	23
Disagree workload is manageable	61	77	-16
Disagree job has little stress*	81	83	-2

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

\* statistically significant regression coefficients in job satisfaction model

Using the same variables as above, the regression model is stronger for professional librarians than for administrators; R squared = .05 for professional librarians and .37 for administrators, plus several more variables predictive of overall job satisfaction; in addition to above as shown for administrators, the following is also significant.

Other satisfaction correlates:

- 26% of those dissatisfied feel over-qualified, compared to 11% who are satisfied with job
- 47% of those dissatisfied are interested in moving into more responsible position, compared to 34% of those satisfied
- 31% of those dissatisfied would be happy to spend rest of career at current organization, compared to 71% of those satisfied with their jobs
- 24% of those dissatisfied would be happy to spend rest of career in current position, compared to 65% of those satisfied with jobs
- Of those with MLIS, 92% of those satisfied would make same choice to become professional librarian, compared to 67% of those dissatisfied

Other satisfaction non-correlates:

- MLIS or no MLIS
- Number of years in career



- Gender
- Size of library (as measured by number of paid staff)
- Permanent/temporary position
- Unionized/non-unionized position

An examination of job satisfaction among senior administrators reveals some notable sub-sector differences. Job satisfaction levels, for instance, were found to be the lowest among CULC members. Further investigation of the reasons for this lower satisfaction level revealed very little explanation. Likely part of the problem is trying to investigate what could be complex or multifaceted reasons among a small portion of CULC senior administrators (20% or n=56). In other words, with such a small sample it is more difficult to detect trends explaining dissatisfaction rates.

**Table 10: Percentage Of Senior Administrators and Professional Librarians “Satisfied” or “Very Satisfied” with Job**

Library Sector	Percent	
	Senior Administrators <sup>1</sup> (n=537)	Professional Librarians (n=1,628)
<b>TOTAL SAMPLE</b>		
<b>TOTAL ACADEMIC</b>	<b>91</b>	<b>79</b>
CARL	93	79
Other Academic	88	78
<b>TOTAL PUBLIC</b>	<b>84</b>	<b>76</b>
CULC	80	76
Other Public	85	77
<b>TOTAL SPECIAL</b>	<b>92</b>	<b>72</b>
Government	92	73
Non-Profit	96	72
For-Profit	86	76
<b>TOTAL SCHOOL</b>	<b>84</b>	<b>83</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

**Table 10: Work Week hours of Senior Administrators and Professional Librarians (full-time only)**

Library Sector	Percent					
	Senior Administrators <sup>1</sup> (n=486)			Professional Librarians (n=1,592)		
	30-39	40-45	46+	30-39	40-45	46+
<b>TOTAL SAMPLE</b>	<b>23</b>	<b>43</b>	<b>34</b>	<b>39</b>	<b>39</b>	<b>22</b>
<b>TOTAL ACADEMIC</b>	<b>23</b>	<b>51</b>	<b>26</b>	<b>56</b>	<b>37</b>	<b>7</b>
CARL	16	51	33	55	38	7
Other Academic	30	51	19	58	35	7
<b>TOTAL PUBLIC</b>	<b>40</b>	<b>41</b>	<b>20</b>	<b>80</b>	<b>18</b>	<b>2</b>
CULC	25	38	38	82	16	2
Other Public	46	42	12	72	25	3
<b>TOTAL SPECIAL</b>	<b>42</b>	<b>50</b>	<b>8</b>	<b>68</b>	<b>31</b>	<b>1</b>
Government	34	58	8	72	27	1
Non-Profit	60	37	3	61	37	2
For-Profit	32	64	5	56	44	0
<b>TOTAL SCHOOL</b>	<b>37</b>	<b>43</b>	<b>20</b>	<b>56</b>	<b>41</b>	<b>3</b>

Source: 8Rs Canadian Library Human Resource Practitioners' Survey, 2004

CARL senior administrators are working the longest work weeks. However, compared to other administrators on campus, they work somewhat fewer hours. Results of a study of the workloads of faculty and other staff at the University of Alberta revealed that 95% of faculty administration (e.g., deans, chairs, and other department heads) work more than 40 hours/week compared to 84% of CARL administrators (Sorensen, 2006), compared to other professionals, 45% of whom work more than 50 hours/week (Higgins and Duxbury, 2002).

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# The 8Rs in Academic Libraries: Viewed Through an Organizational Culture Lens

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## Introduction

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In this chapter, the key findings of the 8Rs study, as they relate to academic libraries, are examined from an organizational culture perspective. Using an organizational culture framework, we will consider how the national trends identified in the 8Rs study can be used to understand and inform organizational development at the local level. Organizational culture plays a critical role in creating an environment where employees are committed and contribute to the success of the organization. Through an analysis of workplace culture it is possible to identify required changes to values, organizational structure, leadership and management initiatives, and support mechanisms which will facilitate a positive, creative, and rewarding work environment that supports the progress and success of library staff and therefore the library. As noted in the analysis of the 8Rs findings, “In order to build healthy workplaces, senior managers need to understand where their staff are both satisfied and dissatisfied, and provide opportunities to staff throughout the organizational hierarchy...” (8Rs Research Team, 2005, p. 19). Given the role organizational culture plays in the growth, innovation, and effectiveness of academic libraries, it is useful to interpret the findings of the 8Rs study, in particular those dealing with recruitment, retention, retirement, rejuvenation, and restructuring, within a cultural framework.

There is a wealth of research which examines organizational culture in order to understand the social meaning, structure, and effectiveness of organizations. Understanding organizational culture is a necessary first step in thinking about organizational change and in reshaping organizations for effectiveness and success. Changing organizations in a deep, meaningful, and lasting way must involve changes to fundamental perceptions, beliefs, patterns of behaviour and norms, and ways of sense-making that have developed over long periods of time.

A number of studies have focused on assessing and understanding organizational culture in library settings (Faerman, 1993), the role of culture in the socialization of new librarians (Kaarst-Brown, Nicholson, von Dran, & Stanton, 2004), assessing culture to achieve organizational change (Varner, 1996), and creating a culture of assessment in learning organizations (Lakos & Phipps, 2004).

A research study conducted by the authors at the University of Saskatchewan Library (Shepstone & Currie, 2007) investigated workplace culture and the extent to which library staff were able to participate in, influence, and affect change. The research provided some insight into what is required on the part of leaders and managers in order to shift the library to a more desired organizational culture. This chapter will explore the 8Rs findings through an organizational culture lens and will provide examples of how this case study research, and the 8Rs data, reinforce the importance of diagnosing and assessing the workplace culture in order to implement meaningful strategies

for dealing with recruitment, retention, rejuvenation, retirement, and restructuring issues. Paying attention to the import of organizational culture in these particular “Rs” will contribute significantly to ensuring organizational effectiveness, achieving strategic realignment of human resources, and developing healthy organizations with satisfied and engaged staff. Connecting the broader context of Canadian library work and workers with the unique characteristics of organizational culture at an institutional level provides a new depth of understanding of our organizations and their context.

## Assessing Organizational Culture

Organizational culture, broadly defined, is a collective understanding, a shared and integrated set of perceptions, memories, values, attitudes, and definitions, that have been learned over time and which determine expectations of behaviour that are taught to new members in their socialization into the organization. It is organizational culture that gives identity, provides collective commitment, builds social system stability, and allows people to make sense of the organization (Sannwald, 2000).

As we move through times of significant change, understanding organizational culture is critically important (Kaarst-Brown et al, 2004), and using the 8Rs findings “permits unprecedented opportunity to assess the sector’s readiness for change” (8Rs Research Team, 2005, p. 1). Canadian academic libraries, once characterized by long-term, well-established workforces, are now experiencing retirements of long-serving staff, as well as recruitment of growing numbers of new and mobile experienced librarians. How these “new to the organization” individuals influence, and are affected by, the organizational culture of their libraries has a significant impact both on individual and organizational success. A number of Canadian academic libraries have also recently hired new library deans or directors; methods for assessing organizational culture will be of great value to these leaders as they set a course and pursue future directions for academic libraries.

The 8Rs Research Team concluded that the overall well-being of the library in the future is contingent upon the continuous cultivation of both management and leadership competencies, and that libraries must develop and support a culture where every individual is encouraged to play a leadership role in whatever position she or he holds (2005, p.12). This recognition of the role culture plays in the effective functioning of organizations is supported in the Canadian Association of Research Libraries’ response to the 8Rs study, which acknowledged that the key to staff planning is setting in place a system which considers the best structure and culture to encourage mentoring and broad-based knowledge of the library and its organization (Whitmell, 2006). The cultural assessment process employed in our case study is a helpful tool for managers and leaders as they plan for change at both the institutional and structural level and encourage individuals as agents of change.

## The University of Saskatchewan Case Study

For the U of S Library case study, addressing the socialization and acculturation of library staff new to the organization, how they assimilate and/or influence the culture, values, and perspectives of the library (Black & Leysen, 2002), raised questions concerning the impact of the library’s culture on their work. As researchers, it was clear to us that an assessment of the library’s existing culture would identify the type of work culture desired by staff, inform this institutional planning, and contribute to an organizational change and renewal effort. The research study used Cameron and Quinn’s (2006) Competing Values Framework (CVF) to assess the library’s organizational culture. It explored the current organizational culture, tested for evidence of subcultures, identified the preferred organizational culture, and proposed specific actions to implement a culture change and work towards organizational transformation and renewal. The study revealed that at the University of Saskatchewan Library there was general agreement amongst staff for a transition from the existing “market” culture focused on external positioning, competitive actions, achievement of measurable goals and targets, and a concern with stability, control, and productivity, to an “adhocracy” culture, described by Cameron and Quinn (2006) as a dynamic, entrepreneurial, and creative place to work where leaders are innovators and risk takers, and individual initiative and freedom are encouraged, emphasis is on growth and being at the leading edge, success means gaining unique and new products or services, and there is a commitment to experimentation and innovation.

The study also confirmed the existence of subcultures reflecting some notable differences in the perceptions and expectations between the pre-tenured and the tenured librarians, and between staff (both paraprofessional and professional) who have been with the organization less than six years and those who have been with the Library for 16 years or more.<sup>1</sup>

An awareness of these different perspectives is critical in order to understand how the library is changing with the influx of new staff, and the implications for how effectively the library can move forward, recognizing the changing, and sometimes conflicting, organizational culture preferences. It is important to evaluate the strength and variations in these subcultures in order to determine the most desired areas of change and the most effective ways of influencing and directing that organizational change.

In managing the cultural change process at the University of Saskatchewan away from a market culture to more adhocracy and clan, the research revealed that library leaders will need to focus on encouraging staff to innovate; expanding alternatives; becoming more creative and facilitating new idea generation; communicating a clear vision of the library's future; facilitating and fostering an orientation towards continuous improvement; and encouraging flexibility and positive change for individuals. They will also need to facilitate effective, cohesive, high performance teamwork; manage complex interpersonal relationships, including the resolution of interpersonal problems; and help individuals improve their performance, expand their competencies, and reach personal development goals. The intention is to reinforce desired organizational changes by clarifying expectations for staff, and providing exposure to new knowledge and skills. This will transform the library into a learning organization where people continually expand their capacity and commitment to learning and working together (Senge, 1994) to achieve the desired organizational culture. This case study research made it possible to understand the type of culture preferred by staff and to consider a course of action that will move the library from its current state to a desired new state.

## **The 8Rs Findings — From an Organizational Culture Perspective**

As the U of S study indicates, viewing the 8Rs data from an organizational culture perspective provides some insights into the impact of culture on the work environment. The study also revealed possible strategies for addressing human resource issues with attention to the cultural context. The findings of the 8Rs study confirm that employers and library leaders need to consider the culture of their organization if they are to address the human resource issues, particularly recruitment, retention, rejuvenation, retirement, and restructuring.

The 8Rs Research Team (2005) recommended that libraries begin examining their own institutional demographics and planning for the future; that positional restructuring initiatives should be sensitive to the challenge of balancing workloads with task variety; and that in order to build healthy workplaces, senior managers need to understand where their staff are both satisfied and dissatisfied, and provide opportunities to staff throughout the organizational hierarchy. Engaging tools that allow for the exploration and discussion of organizational culture can help illuminate these aspects of an organization and offer a language and a safe or neutral context in which to begin discussing ways for the organization to move forward into change. Examining these national trends from the 8Rs data within the frame of a specific organizational culture is an important next step in the application of these findings.

## **Recruitment**

The impact of organizational culture on recruitment practices is significant. As the 8Rs Research Team's retention data indicates, libraries have tended to retain staff members for large portions of their careers, hence recruitment decisions are critical (2005, p.16). Libraries therefore need to set selection criteria that assess potential and ability to grow, in the context of the current needs of the organization. New hires need to understand how their career interests fit with the needs and direction of an institution.

A clear articulation of the characteristics of an organization's cultural traits provides a language for shared understanding of what is important in an organization, and can help to inform both the recruiting process and potential new hires. Assessing a library's culture provides much needed information to help determine the needs of the organization, particularly future needs, and to identify the most essential characteristics of new recruits. It also

<sup>1</sup> Results from Phase II, although supportive of Phase I findings, were not statistically significant with only a response rate achieved.

informs the socialization needs of new staff and ensures the greatest possibility for the success of those individuals. Recruiting individuals who will embrace and model the behaviours required in the library culture will contribute to the likelihood of both individual and organizational success.

In discussing recruitment, the 8Rs study found that virtually all types of libraries in the Canadian system are finding it difficult to fulfill their leadership, managerial, flexibility, innovation, technology, and workload needs, and that the library community would benefit from the inclusion of the reality of “librarian as manager” into the socialization process for new librarians. The team concluded that in recruiting, a candidate’s prior experience, training, and education in managing and leading outside a library setting should not be ignored, nor should their potential for, and interest in, performing these roles. Efforts to attract individuals to the profession, and to particular organizations, should highlight the fact that most librarian jobs will eventually involve some form of supervising and managing. Early management training should be provided to new recruits and libraries should consider grooming librarians for management and leadership roles soon after they are hired. Amongst recent librarian recruits, 57% indicated an interest in working in a more responsible position, 50% reported they would like to see themselves working in a management position within the next 10 years, and 65% agreed their job provides opportunities for advancement. From these observations it is clear that recruitment, particularly in academic libraries, should focus on those with an interest in leadership roles and emphasize the training and preparation necessary for assuming supervisory, managerial, and leadership responsibilities. Those recruited with this in mind will require an organizational culture which values the leadership and management competencies of its staff, supports distributed leadership and management opportunities throughout the organization, and fosters staff engagement through the provision of management and leadership skills training. A highly hierarchical organizational culture, as defined by Cameron and Quinn (2006), for example, may find this type of distributed or expanded project leadership more difficult to accommodate in its structure, or to embrace this behaviour in its collective understanding of what is valued behaviour in the organization.

## Retention

As with recruitment issues, organizational culture can be especially influential in the organization’s capacity to retain staff. The 8Rs data on retention found that the main factors contributing to retention include positive work relationships and challenging work environments, loyalty to the organization and its users, and support and recognition for librarians’ contributions. Support for professional development and growth, more-than-adequate salaries and benefits, personal ties to the community, and location and reputation of the organization, were also considered important for the retention of staff. The degree to which a library’s culture promotes job satisfaction, job mobility, promotional opportunities, and training and development, influences an individual’s decision to stay in an organization.

Not surprisingly, job satisfaction is a strong retention motivator. According to the 8Rs data, factors such as liking their job (85%), the workplace (79%), and co-workers (84%) are the most compelling reasons why librarians stay at their workplace. It is also clear that opportunities for mobility and promotion are important retention factors. Internal organizational and work structures can impede or promote progression and professional growth. Libraries can encourage employee retention and growth by providing management and leadership training through experiential means such as mentorship, job rotation, and job sharing programs, and project leadership. Organizations exploring these findings within the framework of organizational culture may want to consider what cultural characteristics might best support these types of initiatives. Clan cultures that support personal relationships and emphasize mentor roles and relationships would be significant to achieving these ends. And adhocracies with an emphasis on distributed leadership might also be relevant to fostering these types of roles.

The 8Rs findings suggest that existing promotional opportunities offered within Canadian libraries match fairly well with the current career interests of the librarian workforce. However, training in management, leadership, and business for all librarians was found to be most lacking, especially in light of the organizational need for librarians to perform such roles. Though the organizational longevity of librarians limits promotional opportunities, it confers the added benefit of long-term management and leadership grooming possibilities that can begin with new recruits. Balancing the benefits of low turnover rates with the limitations it places on internal mobility is particularly relevant for academic libraries.

It is clear that maintaining a high quality work environment is a major contributor to the organizational retention of librarians. Assessing the organizational culture to identify those aspects of the work culture that support and contribute to the success of library staff becomes a management imperative. Understanding the desired culture for the organization, and making moves toward embracing these values, will certainly support job satisfaction and have a positive impact on the organization's overall health.

## **Rejuvenation through Quality of Work and Job Satisfaction**

Evidence of the contribution work culture makes to staff engagement and rejuvenation can be found in the 8Rs findings. Both the quality of the work and job satisfaction experienced by library staff are, in large part, determined by the type of culture in the work environment. According to the 8Rs findings, performing a wide variety of tasks (87% of respondents reporting the need to perform an ever widening array of tasks), at a more difficult and complex level, and in a leadership role, were found to be significantly and positively related to jobs that are enjoyable, rewarding, interesting, and challenging, and contribute to a more fulfilled workforce.

The two single most important contributing factors to job satisfaction for both the professionals and paraprofessionals are that they are treated with respect by their superiors and that they work in a job that allows them to grow and learn new skills. These factors are congruent with library institutional needs to continue to innovate as they respond to changing user demands and new technologies.

In order to build healthy workplaces, senior managers need to understand where their staff are both satisfied and dissatisfied, and provide opportunities to staff throughout the organizational structure, while clearly communicating any limitations within which the institution must function. A workplace culture that employs job enlargement, job enrichment, quality circles, and participative management can result in increased productivity and job satisfaction, according to the 8Rs findings.

Increasing librarians' involvement in organizational development counters the routine nature of the profession and contributes to rejuvenating and engaging employees. The 8Rs study revealed a closer match between librarians' interest in participating in decisions and having a job that allows them to do so with respect to the overall library strategy than for decisions pertaining only to their own area of work.

## **Restructuring**

Organizational culture should be a major factor in successful restructuring and re-engineering initiatives. These changes alter both the work environment and the role of the individual. A significant amount of the 8Rs data refers to changing roles, functions, assignments, and work expectations for library staff.

The findings document the extent to which librarians are increasingly required to assume managerial, supervisory, and leadership roles, and to relinquish at least some of their traditional functions to paraprofessional staff. The study concluded that the relative roles of the librarians and paraprofessional staff need to be fluid and experimental to meet the changing needs of the library and its users. The culture of the workplace will determine the ease with which this can be accommodated. Cultures which value and facilitate innovation, experimentation, risk taking, individual initiative, and investment in human resource development are more likely to foster organizational transformation and renewal than cultures which emphasize stability or a formalized and structured workplace where rules and policies prevail and the major concern is with maintaining a smooth running organization and getting the job done.

The 8Rs study observed that of all the organizational changes that contribute the most to shifting librarian roles, the increased use of information technology clearly stands out as the most influential determinant for all library sectors. A workplace culture that supports innovation and creativity and is sensitive to client needs is likely to more easily embrace the continuous pressure to adopt, implement, and maintain technology.

For many libraries, restructuring has become a strategy to address emerging staffing requirements to meet the changing expectations of users. As the 8Rs study discovered, with six in ten libraries citing limited budgets as a barrier to recruitment, it is not likely that most libraries will be in a position to create new positions just

because they are needed. Rather it may be that positions are restructured to accommodate increased and changing demands and to create new leadership opportunities.

## **Retirement**

As the academic library sector is expected to experience retirement rates above the norm, the capacity for libraries to respond strategically and create a work environment that fosters staff success is critical. According to the 8Rs study, the most frequently cited barriers to the replacement of competencies lost by retiring librarians include budget restraints; inadequate leadership or management training within the organization; absence of a succession plan and an inadequate pool of qualified, interested candidates; and the inability to fast track strong candidates.

The 8Rs study recommends organizations undertake a succession management process which will anticipate and manage the effects of retirement. Succession planning will have to consider graduated retirement plans, mentorship programs, and internships and other schemes that allow transfer of essential knowledge and skills and attempt to replace the leadership qualities that are lost when librarians retire. An organizational culture which places a premium on human resource development and commits to mentoring and building staff participation, teamwork, cohesion, and morale, positions a library to successfully engage in continuous succession planning which considers the required competencies to fulfill institutional needs.

## **Considering the National and the Local**

Analyzing the 8Rs research study findings from an organizational culture framework makes it possible to propose specific actions to implement culture change and achieve the kind of enduring organizational transformation and renewal necessary for success. Assessing organizational culture provides an opportunity to take the “directional temperature” of the organization. By understanding both the current and the preferred culture of the library, and by observing the areas of greatest discrepancy between them, a road map for change can be developed.

There are some very clear messages in the 8Rs findings that speak to the kinds of cultures that need to be developed in libraries to facilitate the positive, creative, and rewarding work environments that will support the progress and success of library staff and libraries. While a cultural assessment exercise reveals the cultural characteristics specific to individual organizations, it is important to learn from existing data, such as that found in the 8Rs study, in order to understand the overarching context of the library profession in Canada. Comparing cultural assumptions and perceptions within a particular organization with those of the broader community can help us determine what our particular library’s strengths and limitations might be and consider how a cultural change process might affect those factors. The 8Rs study, for example, recommended that efforts to groom the next generation of leaders and managers need to begin now, not only with mid-level librarians, but with recent entrants into the profession. A culture then, which fosters individual development, encourages collaboration and teamwork, and provides mentorship, and where staff commitment and participation is high, will support this growing of leadership and managerial expertise.

At the University of Saskatchewan Library, in order to address innovation, future directions, and continuous improvement (characteristics of an adhocracy culture), as well as teamwork, interpersonal relationships, and staff development (characteristics of a clan culture), leaders need to focus on encouraging staff to innovate; expanding alternatives; becoming creative and generating ideas; and fostering continuous improvement, flexibility, and productive change. Facilitating effective, cohesive, smooth functioning, and high performance teamwork, managing interpersonal relationships, including supportive feedback, listening to and resolving interpersonal problems, and helping individuals improve their performance, expand their competencies, and obtain personal development opportunities will be essential activities of leaders at all levels in the organization.

## **From Assessment to Change Management**

Assessing organizational culture is the first step in moving towards organizational change. Systematically managing a culture change involves engaging staff in a process of discovering or revealing cultural perceptions and understandings and actively discussing, codifying, and agreeing upon appropriate new behaviours and activities. Culture change is, at its essence, about behaviour change; managing that change in culture depends on



the implementation of behaviours by individuals in the organization that reflect and reinforce the values of the desired organizational culture. It is the shared understanding of cultural values that allows people to act independently within the organization and create a change in work engagement (Tichy & Cohen, 1997). It is important, therefore, to specify what people will be doing in the desired culture (Hooijberg & Petrock, 1993). For example, the 8Rs study found that institutions need to communicate what leadership looks like in their setting, what is expected, and how it will be recognized within their organization.

A fundamental and enduring cultural change will only occur if the change process becomes personalized, individuals are willing to engage in new behaviours, and there are changes in the managerial competencies demonstrated in the organization to support and model these expectations. Given the leadership and managerial responsibilities of librarians, and the critical role distributed leadership can play in creating meaningful organizational change, it is important to examine the behaviours leaders and managers must adopt to engage in a successful culture change effort. Through a cultural assessment exercise it is possible to identify the types of competencies and expertise needed to increase elements of the desired culture.

Creating an organizational culture that fosters staff success begins with understanding the characteristics of the present organizational culture, and identifying the desired future culture and what needs to change in that culture to reach desired goals. Communicating this new direction, and creating appropriate support mechanisms, opportunities for learning and growth, and a clear plan of action for change and improvement are critical. Staff success can only be achieved through both an individual and a collective change process that involves a continuous negotiation between perceptions, values, goals, and actions. All of these must be aligned in order to foster staff achievement and organizational transformation.

## **Recommendations**

Through our cultural assessment research conducted at the University of Saskatchewan, we have both confirmed some of our hypotheses and discovered new considerations important for the future development of the organization. The insights learned at the local level are reiterated and expanded through the 8Rs study.

In order to achieve organizational success it is essential to be aware of the cultural issues at play in any organization. The cultural characteristics of an organization need to be revealed and understood in order for the organization to be self-reflective in order to pursue improvement and growth and to respond effectively in the broader cultural, professional, and economic context. In order to be able to successfully address recruitment, retention, restructuring, and rejuvenation of the staff, the library as an organization must understand what cultural perceptions exist, and how they might impact and influence current and future efforts to move a library forward.

It is clear that without a thorough understanding of the culture of an organization, the change process cannot effectively be addressed. Leaders often know they need to do something about pending retirement volumes, yet they don't take a step back to understand the relationship between recruitment and retirement. What type of organization are we now and where do we want to be in the future? In what ways can we focus our recruitment efforts to achieve some of these goals? Essentially, who do we want to bring into this changing organization? How can we leverage recruitment to ensure we are moving to the preferred culture? How is our definition of preferred culture changing with these new-to-the-organization members and with the loss of retiring colleagues? It is important that libraries be consistent in communicating the values of the new or desired culture when they engage in recruitment, and that these are reinforced in the socialization processes for new-to-the-organization colleagues.

Rejuvenation is linked closely with the challenges found in retirement and recruitment. Organizational renewal, even if not accompanied by extensive numbers of retirements and recruitments, will require skilful management of both old and new cultural expectations. Modelling, rewarding, and communicating the new expectations will take time to filter to all staff. Fostering this behaviour at all levels of the organization will result in the most success; finding ways to identify and build on the enthusiasm and interests of key members of the staff, regardless of where they reside in the organization, will be critical. Leaders and managers will need to consistently communicate, reward, and model the new behaviours, but that alone will not result in a fully integrated cultural shift. Finding ways to meaningfully engage the attention of staff in organizational change will require the commitment of new and existing staff.

Rejuvenation of an organization requires the rejuvenation of the individuals which comprise the team. Work teams may strive to include a multitude of perspectives, and careful leadership of the group should help to guide such diverse teams to success. These micro environments may be a step towards rejuvenation for those who have been with the organization for a significant number of years, and an aid to the development of those new to the profession. It may also be the case that specialized work teams may need to be created with the membership selected to be more similar than diverse. Perhaps there is a project that requires considerable organization-specific experience. In that case a team of long-time employees might be well suited to the task. The opportunity to enliven engagement or to move toward culture change is not lost with such a grouping. Careful group management and strong leadership of the team's process is needed. The process may create a group with a level of comfort and familiarity that will actually allow for more engagement in the change process. In all cases, understanding the cultural milieu of the organization, and the sub-cultures at work within the larger whole, will help inform and tailor successful rejuvenation opportunities.

Supporting cultural change will require some elements of restructuring. The structure of an organization should reflect and support the characteristics of the preferred culture, and should demonstrate and reinforce the values that the organization has identified as key. Starting with an understanding of the type of organization desired will provide leaders with the framework on which to build new, or renovate existing, structures. Institutional priorities should be reflected in how work is organized and how exceptional achievement and ongoing success are rewarded. If an organization is pursuing a preferred culture, emphasizing adhocracy characteristics and flexibility is critical. Work-teams, idea generating opportunities (formal and informal), and participation in project-based leadership roles should be considered. This is in keeping with some of the challenges identified in the 8Rs study that speak to the need to mentor and groom newer professionals for management and leadership roles. Restructuring should allow for these types of spaces for trial and error, and for experimentation and discovery.

Although job-satisfaction for the profession of librarianship is considered high in the findings of the 8Rs study, we should not become complacent about the job satisfaction levels within our specific libraries. Understanding job-satisfaction in the local context is essential. Balancing the retention of exceptional staff with the need to create new opportunities for growth, and expanded personal and professional development, needs to be incorporated into any successful restructuring endeavour. As confirmed in the 8Rs study, job satisfaction emphasizes the intrinsic elements found in work rather than focusing on extrinsic considerations. An organization's culture has a strong influence on these intrinsic elements valued by individuals. It may be that these exist already in the value set of an organization, and should be retained through any culture change exercise, or emerging elements may need to be supported in a new culture. Like cultural change, job satisfaction is highly dependent on, and driven by, the individual. In all cases, understanding the needs and perceptions of the individuals within an organization is necessary before an organization can be reshaped appropriately to address future goals.

The extensive data collection carried out by the 8Rs research team has provided Canadian libraries and cultural industries with a strong sense of the current context and future issues. It has created an important view of the landscape at a national level. Our tasks now, as library staff, librarians, and library leaders, is to use this data to inform our decisions as we help move and change our organizations for future success. Understanding the nature and the cultural environment of our particular organizations is not replaced by the 8Rs study. In order to make meaningful change happen, it needs to begin at the individual organizational level. The 8Rs study provides us with the ability to compare what we have learned about our organizations to the broader Canadian context. It helps us identify where we can improve, what we need to be watching for in the future, and what has changed since the study was conducted. It allows us to see where individual innovation may be leading the way and to ensure that our continued success is grounded in cultural values and characteristics that encourage and support productive, engaged, and satisfied library staff.

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# Keeping Public Librarians in the Workforce Beyond Early Retirement Eligibility: An Exploration of 8Rs Data

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## Introduction

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The aging of the Canadian population is expected to change the future Canadian workforce significantly. Statistics Canada (2003) predicts the proportion of the population in the age group 65 and over will expand rapidly, reinforced by a low birth rate and longer life expectancy. It is forecast that, by 2011, 41% of the Canadian working population will be aged 45 to 64, compared to 29% in 1991 (Human Resources Development Canada, 2002). The Conference Board of Canada (Parker, 2006) explored the implications of an aging workforce and identified a number of challenges that will arise. As the baby boomer generation moves into retirement, organizations and industries will face skill, experience, and leadership shortages. Increased retirements will lead to the loss of technical and corporate knowledge; the supply of new employees may not be sufficient to fill the vacancies; and succession planning will be more challenging due to the reduction in qualifications and experience present in the talent pools (Parker, 2006).

Although many organizations are aware of the upcoming demographic challenges, few have taken proactive steps to retain older workers. Parkinson states,

Employers' decisions regarding the employment of mature workers (employees aged 50 years and above) have remained based primarily on expected retirement and economic forecasts, with little emphasis on retention. The preserved corporate memory and demonstrated service of mature workers is often overlooked — never more so than in times of organizational restructuring and economic downturn. (2002, p. 7)

Through the 1980s and 1990s practices that encouraged early retirement were much more common than practices that engage older workers (The Conference Board, 1984, as cited in Parkinson, 2002). Early retirement programs were a common reaction to budget cuts in a number of publicly funded institutions, such as universities, libraries, and government agencies during this time period. Corporations facing rapid deregulation or financial issues also relied heavily on early retirement programs to reduce payroll expenses. The resultant loss of institutional knowledge, and the heightened expectations of workers for early retirement, are now creating human resources challenges for many organizations in Canada.

Auster and Taylor (2004) studied the impact of downsizing on Canadian academic libraries throughout the 1980s and 1990s. They concluded that given the reduced employment levels in university libraries due to attrition and regular retirements, and early retirement incentives used during this time period, the need to retain experienced academic librarians had become paramount.

*The Future of Human Resources in Canadian Libraries* (8Rs Research Team, 2005) showed that Canadian public libraries have already been affected by the retirement of librarians. During 1997 and 2002, member libraries of the Canadian Urban Libraries Council (CULC) had an average of 4.1 retirements per library, with a loss of 7% of the librarian workforce (8Rs Research Team, 2005). Public libraries that were not members of CULC reported fewer retirements, with 1.3 retirements per library, but this represented a greater loss of the library workforce (10%). The report also provided estimates of retirement ages of public librarians aged 50 and older. The estimates showed that 2% of public librarians expect to retire prior to age 55, 38% expect to retire between the ages of 55 and 60, 30% expect to retire between the ages of 61 and 64, and 24% expect to retire at age 65. Only 6% expect to retire after 65 (8Rs Research Team, 2005).

More recent evidence indicates that socio-economic trends are causing a rise in the median retirement age and a resulting increase in the participation rates of older workers compared to the 1990s (Wannell, 2007). These changes may help reduce the challenges faced by the public library system in Canada. Nonetheless, given the significant proportion of public librarians in the baby-boomer cohort, administrators of public libraries should be aware of the possibility of a reduced workforce and prepared to take appropriate actions. This paper reports on a study that explored the 8Rs dataset to identify approaches that the Canadian public library system could undertake to encourage professional librarians to stay in the workforce longer so that the profession would benefit from their extensive knowledge and leadership skills, and knowledge transfer to younger professional librarians would be facilitated.

## Conceptual Framework

The literature identifies a wide variety of factors that affect an individual's intent to retire, some of which are organization driven and some that are personal. There are a variety of personal factors that make retirement more or less attractive to older workers. These factors, which include health, personal finances, and social and family-related issues, have been addressed in depth by other researchers (Feldman, 1994 and Ruhm, 1989, as cited by Yeatts, Folts, & Knapp, 2000). We do not consider these factors in this study. Rather, we focus on factors which administrators can change. Figure 1 presents the conceptual framework for our study. The framework centres on three factors: job attributes, work arrangements, and the work environment, and is derived from the work of Locke (1976) and the American Association of Retired Persons (2002).

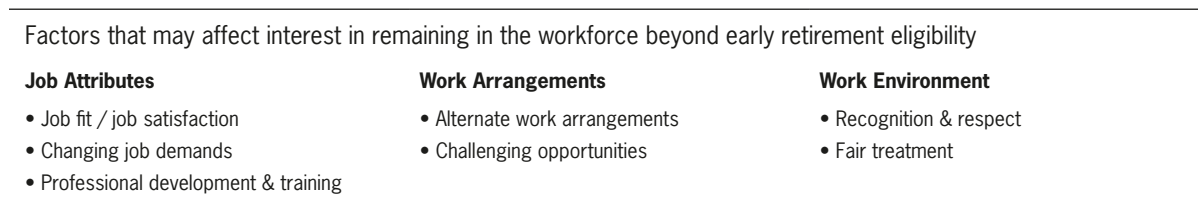


Figure 1. Conceptual framework for the study.

## Literature Review

The literature review focuses on the key aspects outlined in the conceptual framework: job attributes, work arrangements, and the work environment.

### **Job Attributes**

Job attributes include job fit/job satisfaction, changing job demands, and professional training and development.

## **Job Fit/Job Satisfaction**

Locke (1976) found that job satisfaction results from the attainment of values that are compatible with one's needs. He introduced the Value-Percept Model which provides a formula for expressing job satisfaction:

$$\text{Satisfaction} = (\text{want} - \text{have}) \times \text{importance}$$

Locke's view was that when an organization has a culture that meets an individual's value needs, the individual displays greater work motivation and job involvement and less interest in leaving the organization.

O'Reilly, Chatman, and Caldwell (1991) demonstrated that people who fit the work setting are more satisfied and more committed than people who do not fit well, while Van Vianen & Kmieciak (1998) postulated that the fit between a person's values and organizational values is associated with behavioural and emotional outcomes, such as longer tenure, greater organizational commitment, and better job performance.

Job fit theory presents the idea that individuals compare their knowledge, skills, and abilities, in addition to their interests, motives, and goals, to the characteristics present in a job and the related organization. The better the match between the individual and the job and organization, the greater is the employee's commitment, performance, and retention (Starks, 2004). In discussing job fit theory, Starks stated that,

Each individual possesses unique dispositions, abilities, and experiences that affect the type of work they are drawn to and the type of organization for which they are most suited. Jobs and organizations [which] possess characteristics that are congruent with these individual characteristics produce a fit that both attracts the individual and motivates him or her to stay. This is the basis of the job fit theory. (p. 46)

## **Changing Job Demands**

A clear question arises from job fit theory. What happens when the job fit changes, either due to an employee's changing needs or skills or the changing requirements of a job? Many jobs have undergone tremendous change in the past two decades due to a variety of factors. The introduction of technology has had a huge impact, changing the very way many people perform their jobs. Shrinking budgets, flatter management structures, and increasing responsibility and decision-making authority of employees in numerous workplaces, including public libraries, have also had a big impact. Auster & Taylor (2004) discuss the importance of an organization's commitment to its human resources in times of change, indicating that many employees worry about their ability to function in a new environment, especially if their jobs have been redesigned.

Affected employees may choose to leave their jobs by taking early retirement rather than adapt to workplace or job changes. Yeatts et al. (2000) indicate that for employers, such departures create additional costs for hiring and training new workers. In addition, the loss of expertise and institutional knowledge is often difficult to replace. Employees, in turn, can face financial consequences and significant lifestyle changes. Building on Atchley's definition of adaptation, Yeatts et al. define work adaptation as "the continuous and dynamic process by which an individual seeks to establish a complementary, reciprocal relationship, or 'fit' with his or her job" (p. 567). When a job changes, an employee puts forth effort to re-establish the job fit and return to an acceptable level of satisfaction. The re-establishment of the job fit and the resulting satisfaction increase the likelihood that an employee will choose to remain on the job and that an employer will choose to retain the employee. While employees of any age may resist change due to factors such as perceived loss of control, discomfort with uncertainty, or the perception that any change is inconvenient, older workers, for whom retirement is an option, may be especially unwilling to adapt to changing job requirements and may choose to leave their jobs instead. Research conducted by Pollman and Johnson, as cited in Yeatts et al., concluded that "older workers facing or merely anticipating on-the-job changes [were] more apt to retire early" (p. 572).

## **Professional Development and Training**

Training has been identified as an important component of retention, and is seen as increasingly critical for the retention of older workers (The Commonwealth Fund, 1993, as cited in Armstrong-Stassen & Templer, 2005). The 8Rs study indicated that significant proportions of librarians at all levels, and across all job functions, require

ongoing training in their jobs. While new recruits require the most training, a significant number of mid-career and senior librarians require training as well, and as such, both “individuals and institutions must commit to continuing education as an ongoing necessity” (8Rs Research Team, 2005, p. 138).

Auster and Chan (2003) addressed the importance of maintaining professional competence in the library context. In a study of reference librarians in large urban public libraries in Ontario, they found that professional development depends upon a variety of individual characteristics and organizational factors. Regarding organizational factors, the key element was having a supervisor or manager who is supportive of career development opportunities. Auster and Chan also discovered that only one of the seventeen organizations surveyed had a written policy on professional development and training.

A study conducted by the American Association of Retired Persons (2002) provided a comprehensive snapshot of the view of work and work-life balance issues held by American workers and retirees between the ages of 45 and 74. The findings indicate that most 45–74-year-old workers feel that their careers are going strong and they want their jobs to continue to offer opportunities for them to grow and develop professionally. Seven in ten workers surveyed rejected the idea that they should not have to learn new skills at their age and stage in life; 88% of older workers said that their ideal job would offer them an opportunity to learn new things; and 73% of respondents said their ideal job would offer on-the-job training. Data collected for *The AARP Working in Retirement Study* supported these findings. This AARP study involved approximately 2,000 Americans between the ages of 50 and 70 who were employed full-time or part-time. The report of the study concludes that employers should actively provide training since many older workers want opportunities to continue learning, further develop their skills, and remain mentally active (Brown, 2003).

Research conducted by Armstrong-Stassen for the Canadian Association of Retired Persons (CARP) confirms the AARP findings in the Canadian context. In a 2004 survey, 51% of employed respondents indicated that access to new technology to assist older workers (defined as 50 years and older) in performing their job was very important to their decision to remain in the workforce. However, only 21% of employed respondents reported that their organizations were highly engaged in providing such access, with another 20% of organizations somewhat engaged in doing so. The ability to update skills was rated as highly important by 41% of employed respondents; however, only 19% of organizations were rated by the respondents as being highly engaged in providing the ability to update skills (Armstrong-Stassen, 2004). The study also investigated the incidence of educating managers about effective ways to utilize older workers; 51% of employed respondents felt it was very or somewhat important to educate managers, while only 16% of organizations are highly or somewhat engaged in doing so. These findings indicate that organizations are not as engaged in providing training as their older workers would like them to be.

Research conducted by the Conference Board<sup>2</sup> (Parkinson, 2002) supports the view that organizations need to identify the training needs of mature workers, indicating that development opportunities engage workers, giving them a greater incentive to stay with their company. The research involved a survey of approximately 1,600 employees aged 50 and older at eight American companies, and was designed to explore the retirement intentions and perspectives of these employees.

### **Work Arrangements**

The key factors under work arrangements are work schedules and challenging opportunities.

### **Alternate Work Arrangements**

In response to the question, “For you personally, which of the following things, if any, are absolutely essential parts of your ideal job?” AARP (2002) found that 76% of workers between the ages of 45 and 74 specified a flexible schedule and 53% specified the opportunity to work part-time. Another study conducted by AARP (Brown, 2003) concluded that many older workers put a high value on workplace flexibility as they try to balance family and work responsibilities. Research conducted by the Conference Board (Parkinson, 2002) also supports these findings. Alternate work arrangements, including a compressed work week, telecommuting, and job sharing enable workers of all ages to more effectively balance their work and personal lives. One-quarter of the survey

<sup>2</sup> Throughout this paper, Conference Board refers to the American-based Conference Board, while Conference Board of Canada refers to the Canadian-based Conference Board.

respondents indicated that they continue to work because their company provides them with the flexibility that they need, and nearly 50% said that more flexibility in working hours would encourage them to stay in the workforce. Telecommuting options would also serve as a positive reason to stay for nearly one-third of the survey respondents (Parkinson, 2002). Schellenburg and Silver (2004) found that over 25% of recent retirees said they would have continued to work if they had been able to reduce their work schedule without affecting their pension, either by working fewer days (28%) or shorter working hours (26%).

In 1998, Coleman provided a thorough review of the ways that changes in employee benefits can respond to the needs of increasingly older median age workers. He indicated that one of the most important strategies when dealing with an aging workforce is providing flexibility in work arrangements. However, the findings of a survey of 493 Canadian private and public sector organizations in 2006 by Armstrong-Stassen and Templer revealed that only a small percentage of the companies surveyed were highly engaged in providing flexibility in work arrangements: 20.7% of the companies were highly engaged in offering flexible work schedules, 9.7% were highly engaged in providing part-time employment options, 6.9% were highly engaged in providing job sharing, 9.7% were highly engaged in providing telecommuting options, and 16% were highly engaged in assisting with elder-care responsibilities by providing such options as unpaid leave or personal obligation days.

The 8Rs Research Team (2005) found that 60% of public librarians strongly agreed or agreed with the statement, “In my job I am provided with the opportunity to balance work and family or personal life.” This stands somewhat in contrast to the Institutional Survey findings that only 19% of public libraries provide job-sharing opportunities, 45% provide flex-time opportunities, and 13% provide compressed work weeks.

### **Challenging Opportunities**

Armstrong-Stassen’s 2004 research study found that older workers value challenging tasks and taking on new roles; 61% percent of respondents aged 50 and older indicated that having the opportunity to complete challenging and meaningful tasks or assignments is a very important factor in their decision to remain in the workforce. However, only 38% of respondents reported that their organizations are highly engaged in providing challenging and meaningful tasks or assignments to their older workers (Armstrong-Stassen, 2004). The Association of College and Research Libraries’ Ad Hoc Task Force on Recruitment and Retention Issues (2002) also emphasized the importance of creating stimulating and exciting work environments and creating new jobs and responsibilities in the retention of all employees.

### **Work Environment**

Key factors in the work environment are recognition and respect, and the concept of fair treatment.

### **Recognition and Respect**

AARP’s 2002 study found that 90% of older workers considered feeling respected by co-workers to be a critical aspect of their ideal job, and 84% considered feeling respected by their supervisor to be a critical aspect of their ideal job. Similarly in a Canadian study, Armstrong-Stassen (2004) asked respondents aged 50 years and older to identify the top human resources practices related to recognition and respect. The most mentioned of these practices were: (1) showing appreciation for a job well done, (2) recognizing the experience, knowledge, skill, and expertise of older workers, (3) providing older workers with useful feedback on their performance, (4) ensuring older workers are treated with respect by others in the organization, and (5) recognizing the part older workers can play in an organization.

A different study by the Conference Board (Parkinson, 2002) found that one-third of surveyed workers between the ages of 45 and 54 who were planning on retiring did not feel respected by their companies. The 8Rs Research Team (2005) found that 97% of public librarians strongly agreed or agreed with the statement, “It is important to me to have a job in which I am treated with respect by my superiors.” However, only 74% of respondents strongly agreed or agreed with the corresponding question, “I am treated with respect by my superiors.”

### **Fair Treatment**

The CARP research project found that the feeling of being treated fairly had a strong influence on whether respondents remained with their current organization (Armstrong-Stassen, 2005). The purpose of the study was



to identify those factors that are important in influencing the decision of different groups of mature workers to remain in, or return to, the workforce. The key findings indicated that respondents felt organizations are doing a poor job of recruiting and retaining mature workers, and that recognition and respect practices (recognizing the accomplishments, experience, knowledge, skill, and expertise of mature workers, and ensuring mature employees are treated with respect) are the most important human resource strategies in influencing the respondents' decision to remain in, or return to, the workforce.

### **Conclusion**

Some consistent themes emerge from the literature review. Older workers desire the opportunity to continue to learn and develop, flexible work arrangements, challenging work, and respect and recognition. Through secondary analyses of the 8Rs dataset, this study explores the relevance of these themes to public librarians' decisions regarding retirement. A better understanding of how job attributes, work arrangements, and work environment are related to interest in retiring or not retiring could provide insights regarding how public library boards and management teams might go about retaining public librarians in the workforce beyond their early retirement eligibility date so as to benefit from their extensive knowledge and leadership skills and facilitate transfer of their knowledge to younger professional librarians.

### **Methodology**

*The Future of Human Resources in Canadian Libraries*, the report of a major study initiated by the University of Alberta, in partnership with a number of Canada's library associations, was a response to anecdotal evidence that there was a looming swell of librarian retirements that could significantly impact the Canadian library workforce. The researchers, known as the 8Rs Research Team, considered issues related to recruitment, retirement, retention, remuneration, repatriation, rejuvenation, re-accreditation, and restructuring (the 8Rs) in the Canadian library system. The study involved a literature review and two surveys: a survey of 461 library administrators and human resources managers and a survey of 2,200 professional librarians and 1,900 paraprofessionals. In addition, telephone interviews with 17 library administrators were conducted along with three focus group sessions. In August 2006 the 8Rs Research Team invited proposals from librarians, paraprofessionals, and LIS educators to conduct further analyses of the rich data collected in the study. The study reported here is the outcome of our proposal to explore the 8Rs data for insights regarding how public libraries might go about retaining professional librarians beyond their eligibility date for early retirement so as to benefit from their extensive knowledge and management skills, and facilitate the transfer of such knowledge to younger professional librarians. The public library system was chosen due to both personal and professional interest on the part of the first author.

We analyzed a subset of the data from the 2004 *Survey of Professional Librarians and Paraprofessional Staff* (Individual Survey). From the 4,693 responses in the original dataset, we extracted 628 responses representing librarians who were currently employed by a public library and who reported having a Masters degree in Library and Information Studies or its historical equivalent, e.g. Bachelor of Library Science. The Individual Survey also asked respondents to indicate the job title that best matched their current library position (Question A-7). We included those individuals who selected the job titles of professional librarian, Manager/Administrator, and Other Professional. After examining the job titles of 12 respondents who selected "Other," we determined that 9 were equivalent to a professional librarian and included them in the dataset. (The three individuals whom we excluded indicated their job title was Library Technician or Library Assistant, Associate or Aide.) Finally, we retained only those respondents who had more than 6 years experience working in their professional librarian career, as it was only this group that was asked the series of questions related to retirement. As noted above, the final dataset contained data from 628 respondents.

The study focused on three research questions:

- Which job attributes are likely to keep professional librarians in public libraries in the workforce beyond the date when they become eligible for early retirement? What work arrangements might encourage professional librarians in public libraries to stay in the workforce beyond the date when they become eligible for early retirement?

- What work environment might encourage professional librarians in public libraries to stay in the workforce beyond the date when they become eligible for early retirement?

### **Demographic Characteristics of the Respondents**

The respondents were predominantly female (85%), with 5% between the ages of 60 and 64, 48% between the ages of 50 and 59, 36% between the ages of 40 and 49, and the remainder between the ages of 30 and 39 (11%). In line with the age distribution, 69% of the respondents reported working in their library career in excess of 15 years. An additional 17% of respondents reported having 11–15 years experience, with the remainder of the respondents having 6–10 years experience. As previously indicated, new entrants (defined as those with less than 6 years experience) were excluded from the dataset. The respondents categorized their position as non-management (31%), supervisory (10%), middle management (42%), or senior administration (16%).

Slightly more than half of respondents worked in public libraries in Ontario. Another 21% of respondents worked in the public library system in British Columbia. The Prairies (Alberta, Saskatchewan, and Manitoba) accounted for 17%, Atlantic Canada was reported by 8% of the respondents, with the remainder from Quebec (2%), and Northern Canada (0.3%). Seventy-nine percent of respondents indicated that their library was a member of the Canadian Urban Libraries Council (CULC).

### **Variables**

The independent variables in the study were job satisfaction, job fit (defined as the gap between the importance to a respondent of a job element and the degree to which the element is present in the respondent's job), changing job demands, and the availability of career development opportunities. The dependent variables were the age at which respondents think they will retire, the respondents' interest in an early retirement package if offered, and the extent to which respondents are looking forward to retiring.

We examined relationships using chi-square tests and correlation coefficients. In addition, we conducted a qualitative analysis of narrative responses to two questions: "Please explain why you would or would not accept an early retirement package" and "Please specify what conditions would make you consider delaying your retirement."

### **Findings**

The findings are presented in the order identified in the conceptual framework, moving from job attributes to work arrangements to work environment.

#### **Job Attributes**

Under the category of job attributes, three specific areas were investigated: job fit/job satisfaction, changing job demands, and professional development and training.

#### **Job Fit/Job Satisfaction**

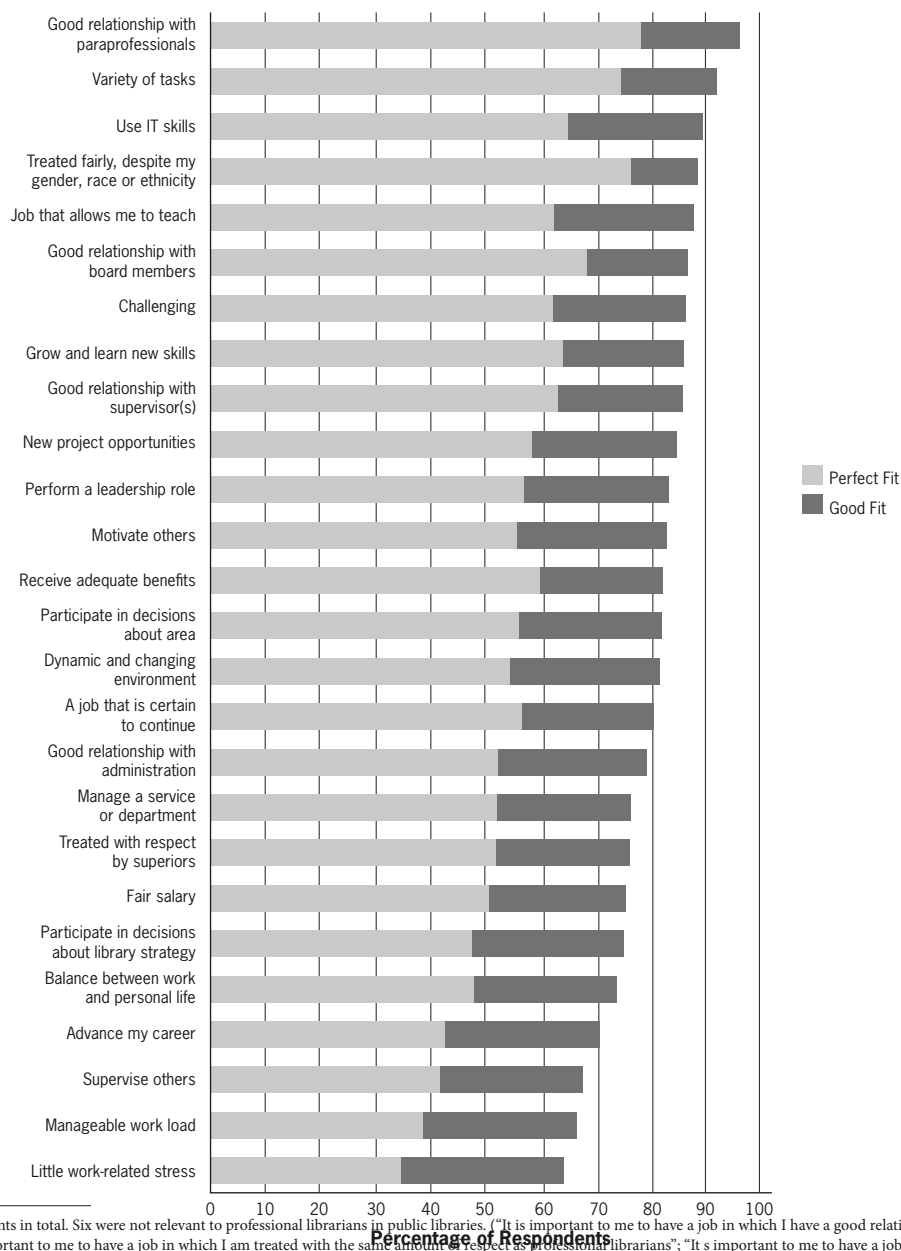
Our analyses revealed a very high level of job satisfaction and a very high level of job fit for public librarians.

We conducted chi-square tests to see if there was a significant relationship between job satisfaction and the three dependent variables: age at which librarians think they will retire from their professional librarian career, interest in accepting an early retirement package if it were offered, and the extent to which they are looking forward to retiring from their job as a professional librarian.

We found a significant relationship between job satisfaction and interest in the acceptance of an early retirement package ( $\chi^2 = 33.122$ ,  $df = 8$ ,  $p < .001$ ). More satisfied employees (those who answered "Very satisfied" to "How satisfied are you with your current job?") are less likely than expected to be interested in accepting an offer of an early retirement package. We also found a significant relationship between job satisfaction and the extent to which a respondent is looking forward to retirement ( $\chi^2 = 40.378$ ,  $df = 8$ ,  $p < .001$ ). More satisfied employees (those who answered "Very satisfied" to "How satisfied are you with your current job?") are less likely

than expected to be looking forward to retirement. These findings suggest that highly satisfied librarians may be more open to persuasion to stay in their jobs past early retirement eligibility. There was no significant relationship between job satisfaction and the age of anticipated retirement.

Each public librarian's response to the questions in the Individual Survey regarding the extent to which they agreed or disagreed with what is important to them in a job, and whether that element is part of their library job, for 26 job elements<sup>3</sup> was classified to determine job fit. For example, one of the sets of statements was, a) "It is important to me to have a job that is challenging" and, b) "My job is challenging." A high degree of fit occurs when the element is important to the respondent and present in his/her job or not important and not present. A "perfect fit" occurs when there is an exact match in the respondent's rating for Importance and Presence for a job element. We defined a difference of 1 between the two ratings as a "good fit." Figure 2 shows the percentage of respondents who have a "perfect fit" or "good fit" between the importance to them of a job element and the degree to which the job element is present in their jobs. As can be seen in Figure 2, over 80% of the respondents have a perfect or good fit for 16 of the 26 job elements. The poorest fits were for supervising others, manageable workload, and little work-related stress.



<sup>3</sup> There were 32 job elements in total. Six were not relevant to professional librarians in public libraries. ("It is important to me to have a job in which I have a good relationship with professional librarian staff"; "It is important to me to have a job in which I am treated with the same respect as other librarians"; "It is important to me to have a job in which I am eligible for tenure"; "It is important to me to have a job in which I am eligible for a continuing appointment"; "It is important to me to have a job in which I am eligible for research leaves"; "It is important to me to have a job that allows me to conduct research and publish.")

Figure 2. Percentage of respondents who have a 'perfect' or 'good' fit between "Importance and Presence" for 26 elements in their jobs.

We conducted chi-square tests to determine if there was a significant relationship between the job fit for any of the 26 job elements and any of the three dependent retirement variables listed above. No significant relationships were found between the age at which respondents expect to retire and fit for any of the job elements.

We found significant relationships between interest in accepting an early retirement package and fit for seven job elements. Table 1 shows the chi-square results for the seven significant relationships. Respondents were less likely than expected to be interested in an early retirement package when there was a perfect or good fit between the Importance and Presence of the job elements shown in Table 1.

**Table 1. Elements of job where fit is significantly related to interest in an early retirement package.**

Job element	N	chi-square	df	p
Job provides me the opportunity to grow and learn new skills.	563	11.146	2	.004
Job allows me the opportunity to seek out new project opportunities.	566	10.657	2	.005
Job allows me to participate in decisions about my area.	572	6.246	2	.044
Job has little work-related stress.	557	9.008	2	.011
Job allows me to balance work and family or personal life.	570	6.064	2	.048
Job that earns a fair salary.	567	7.200	2	.027
Job provides a good relationship with my supervisor(s).	537	10.697	2	.005

We also conducted chi-square tests for the extent to which the respondent is looking forward to retirement and fit for the job elements and we found significant relationships for 10 job elements. Respondents were less likely than expected to be looking forward to retirement when there was a perfect or good fit between the Importance and Presence of the job elements as shown in Table 2.

**Table 2. Job elements where fit is significantly related to the extent to which respondent is looking forward to retirement.**

Job fit	N	chi-square	df	p
Job is challenging.	565	10.802	8	.005
Job allows me the opportunity to perform a variety of tasks.	565	8.447	8	.015
Job allows me the opportunity to grow and learn new skills.	561	8.524	8	.014
Job is in a dynamic and changing environment.	556	7.940	8	.019
Job allows me to participate in decisions about my area.	568	7.298	8	.026
Job has little work-related stress.	554	15.756	8	.000
Job has manageable workload.	562	6.841	8	.033
Job provides a good relationship with supervisor(s).	533	24.373	8	.000
Job provides a good relationship with administration.	518	11.529	8	.003
Job in which I am treated with respect by my supervisors.	548	6.053	8	.048

### Changing Job Demands

The Individual Survey asked about 14 items that deal with changing job demands (we have excluded interesting, enjoyable, rewarding, and less motivated) as shown in Figure 3.

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Compared to five years ago...

- My job is currently more challenging.
- My job is currently more stressful.
- My job currently requires more skill.
- I am currently more concerned about my job security.
- I am currently required to learn more new tasks.
- I am currently required to perform more difficult tasks.
- I am currently required to perform more high tech tasks.
- I am currently required to perform a wider variety of tasks.
- I am currently required to perform more routine tasks.
- I am currently required to work harder.
- I am currently required to perform more managerial functions.
- I am currently required to assume more of a leadership role.
- I am currently required to perform more business functions.
- I am currently required to perform more tasks once done by paraprofessional staff.

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Figure 3. Changing Job Demands.

We conducted chi-square tests to determine if there were significant relationships between changing job demands in the 14 areas and the three dependent variables.

There were no significant relationships between the age at which respondents expect to retire, or the extent to which respondents are looking forward to retirement, and the 14 changing job demands. There were two significant relationships between respondents' interest in accepting an early retirement package and changing job demands. Table 3 shows these data.

**Table 3 Areas where changing job demands are significantly related to interest in accepting an early retirement package.**

Changing job demands	N	chi-square	df	p
My job is more challenging than 5 years ago.	564	15.865	8	.044
I am required to assume more of a leadership role than 5 years ago.	554	17.962	8	.022

The other 12 changing job demands, which include being required to work harder, perform more routine tasks, and more stress did not show a relationship with interest in retirement.

### Professional Development and Training

There were 14 questions related to professional development and training in the 8Rs Individual Survey. Three questions focused on opportunities and support provided by their organization<sup>4</sup>; three questions focused on their interest in participating in professional development and training<sup>5</sup>; and eight questions asked about actual participation in professional development and training.<sup>6</sup> We did not find any significant relationships between any of these questions about professional development and training and any of the three dependent variables,

<sup>4</sup> Does your organization subsidize (or reimburse) any portion of the costs associated with your attendance at library association meetings? Does your organization subsidize, assist, or reimburse your participation in training courses taken outside of your paid working hours? Please indicate the extent to which you agree/disagree with the following statements about training, career development, and organizational commitment: My organization provides me with sufficient opportunities to participate in training.

<sup>5</sup> Please indicate the extent to which you agree/disagree with the following statements about training, career development, and organizational commitment: I am interested in participating in technology skills training; I am interested in participating in management skills training; and, I am interested in business skills training.

<sup>6</sup> For the following list, first indicate if you have ever participated in the type/format of training through your current workplace, and if so, the extent to which the training improved your ability to perform your job: a.) Job-oriented skills training (excluding technology); b.) Technology skills training; c.) Customer-service related training; d.) Management training; e.) Northern Exposure to Leadership (NEL); f.) Other leadership training (not including NEL); g.) Other professional development (e.g., subject specialty, library issues); h.) Mentorship training; i.) Job rotation; and j.) Job sharing.

although such relationships have been found in many previous studies (AARP, 2002; Armstrong-Stassen, 2004; Armstrong-Stassen & Templer, 2005; Brown, 2003; Parkinson, 2002).

### **Work Arrangements**

We used qualitative analysis to examine the preferences of public librarians regarding work arrangements. Of the 628 respondents, 296 provided a response to the question, “Please specify what conditions would make you consider delaying your retirement?” Forty-eight respondents indicated they would consider delaying their retirement if they had a new opportunity, such as the construction of a library building, an installation of a new automated system, or a more challenging job. A typical response was, “If approval was received to construct a new central library, I would stay to project manage construction. In other words, an exciting work project in an area of interest would make me stay.” This desire for challenge is reinforced by other respondents’ comments such as “being able to do more satisfying, challenging librarianship” and “the offer of a more responsible position” and “more advancement, greater opportunities.”

Twenty-one respondents indicated they would consider delaying their retirement if job sharing, part-time work, a reduced workweek, or flexible hours were available to them. Five of the 21 respondents identified a subset of this theme: an interest in moving to a smaller branch or a position with reduced responsibility. The literature refers to this as downshifting or decelerating. For example, one respondent stated, “If I were working as Chief Librarian at a somewhat smaller library than I am now.”

Seven individuals indicated that they would likely continue working if mandatory retirement was abolished. At the time of the survey in 2004, mandatory retirement was still in place in Ontario, which was the home province of 53% of the respondents. Mandatory retirement was eliminated in Ontario in 2007. Other individuals mentioned the issue of compensation and pensions, for example one respondent indicated she would consider delaying retirement if there was an “Opportunity to make higher contributions to OMERS pension plan.”

### **Work Environment**

Twelve respondents indicated that being treated with respect would encourage them to consider delaying their retirement. One wrote, “Acknowledgement of [the] value of my skills and knowledge might be a positive reason [to delay retirement],” while another stated, “A sense that I continue to contribute in a meaningful way.”

There was a positive correlation between the fit for each of the 26 job elements and the level of job satisfaction ( $p \leq .001$ ). The four strongest correlations were for elements directly related to the work environment. Table 4 shows these correlations.

**Table 4. Pearson correlation coefficients for job satisfaction and fit for job elements related to work environment.**

<b>Independent variable: Job element</b>	<b>n</b>	<b>Pearson Correlation</b>	<b>Strength</b>	<b>R2</b>	<b>p</b>
Respected by Superiors	566	0.553	Strong	30.6%	$p < .001$
Good Relations with Administration	534	0.491	Moderate	24.1%	$p < .001$
Good Relations with Supervisors	551	0.480	Moderate	23.0%	$p < .001$
Participate in Decisions About My Area	587	0.471	Moderate	22.2%	$p < .001$

### **Summary of Findings**

We found significant relationships between the independent variables of job satisfaction, job fit, and changing job demands and the dependent variables of the respondents’ interest in an early retirement package if offered, and the extent to which respondents are looking forward to retiring. There were no significant relationships between the independent variables and the dependent variable of age at which respondents think they will retire, or between the independent variable of availability of professional development and training opportunities and the three dependent variables.

## Discussion

Our secondary analyses of the data for public librarians from the 8Rs Individual Survey revealed a high level of job satisfaction and job fit for public librarians. Given that the literature indicates that a high level of job satisfaction and job fit assists in the retention of older workers, the public library system should be able to retain older public librarians in the workforce, if needed for succession planning purposes.

Our findings confirm many of the findings of previous studies of older employees and lead to several suggestions for public library boards and management teams. A first step is to develop an older worker strategy with the goal of maintaining a supply of talent and aiding the transference of valuable skills and knowledge from one generation to the next. Such a strategy includes succession planning. The 8Rs study found that only 31% of the public libraries which are members of CULC reported having a succession plan (8Rs Research Team, 2005). Succession planning should provide library management with the average age and retirement intentions of the workforce and enable a proactive planning process. As a respondent to the 2002 Life Planning survey conducted by the Conference Board commented,

The real opportunity is not to try to determine counter measures now to keep mature workers from retiring once they have decided to do so, but to involve us and utilize us before we reach that point. A timely promotion or increased responsibility three to five years ago would have rejuvenated my interest and energy. (Parkinson, 2002, p. 47)

This view is reinforced by comments made by public librarians when asked what conditions would make them consider delaying their retirement, such as “being able to do more satisfying, challenging librarianship” and “the offer of a more responsible position” and “more advancement, greater opportunities.”

A key element of an older worker strategy is the implementation of policies and procedures for a variety of alternate work arrangements, including the provision of job sharing, flexible work schedules, and part-time positions. The 8Rs findings from the Institutional Survey indicate that only 19% of public libraries provide job-sharing opportunities, 45% provide flex-time opportunities, and 13% provide compressed work weeks. This suggests that there are currently limited offerings of alternate work arrangements to public library employees. However, 60% of public librarians agree that they are provided with the opportunity to balance their work and family or personal life (8Rs Research Team, 2005). The discrepancy between these findings may indicate that more accommodations are being made on an informal basis across the library system. While appropriate offerings of flexible work options will vary across departments and work groups, it is important that guidelines covering items such as eligibility and the expectations of both the employer and employee are clearly established. Each library system should assess its individual situation and determine what flexible work arrangements are already in place and how they can be expanded to meet the needs of the workforce.

Another part of an older worker strategy is to help employees who want to “downshift” their careers by taking on less onerous roles and responsibilities. Public librarians mentioned reduced workloads or moving to a small branch library within the system as reasons why they might consider delaying their retirement. These options may be an effective way to manage the transference of knowledge between older and younger librarians, while keeping older librarians engaged.

With regard to changing job demands, the findings of our study are contrary to some of the literature. While most of the changing job demands asked about in the 8Rs survey (refer to Figure 3) were not related to the extent to which the respondents were looking forward to retirement or whether the respondents would accept an early retirement package, Honig’s research using the U.S. 1995 Health and Retirement Study data found that jobs involving repetitive tasks or stress are associated with lower expectations of continuing to work past age 62. Filer and Petri (1998, as cited in Yeatts et al., 2000) also found that job characteristics such as high stress were statistically related to early retirement. Based on this, along with other literature findings, Yeatts et al. (2000) drew the conclusion that if work environment changes are perceived by workers as creating additional work stress, then it is reasonable to conclude that older workers will decide to retire rather than try to regain individual-job fit.

David Dodge, in a speech extolling the benefits of Canada taking advantage of the knowledge and skills of older workers, stated “we, as employers, must look at the redesign of pension plans” (Dodge, 2007). A recent federal

government budget included proposals that address the potential workforce shortages and aging population issues faced by employers in Canada. First, the federal budget has paved the way for phased retirement as sponsors of defined-benefit registered pension plans will be permitted to give pension plan members the option to receive partial pension payments, while continuing to work and accrue further pension benefits. Members of a defined-benefit pension plan who are at least age 55 and entitled to an unreduced pension will be allowed to receive up to 60% of an accrued pension while accruing current service benefits (Genno & Tarbox, 2007). While it is noted that the proposal favours public sector plans and other defined-benefit plans that offer unreduced early retirement benefits, it is a step forward and offers more flexibility to employers than the rules introduced or proposed in Alberta and Quebec. It is likely that other provinces will amend their legislation regarding phased retirement. The Conference Board recently published a report outlining the various permutations of phased retirement programs in the United States following the 2006 Pension Protection Act, which enables companies to pay pension benefits to employees aged 62 and older who are covered under a defined-benefit plan, even if they continue to work. This new law helps to make phased retirement a viable option for employers who want to retain valuable skills and knowledge in their workforce “while providing older workers with an alternative to the all-or-nothing approach to retirement” (Rappaport & Young, 2007, p. 5). Rappaport and Young set out a very clear approach for employers who wish to look at phased retirement and emphasize the importance of phased retirement as a tool to manage the risk of knowledge worker shortages. For public libraries in Canada wishing to pursue a phased retirement approach to managing their workforce requirements, the Canadian Library Association should be engaged to play a role in articulating the desired public policy and legislative changes while lobbying policy makers and legislators directly regarding necessary pension reforms.

## **Limitations**

There are some limitations regarding the present study. First, the survey responses utilized in the analyses were collected in 2004. There have been significant social and political changes in the intervening years which could potentially change the respondents’ answers to the questions posed. As well, academics and practitioners now say that changing demographics are having less impact on the labour market than expected, and human resources practices, such as developing competencies in recruiting and selection, performance management, retention policies, and other practices can have a greater impact on building and maintaining a high performing workforce (Wannell, 2007).

## **Future Research**

In order to facilitate the workforce planning processes in the public library system, further research should be done into the variety of personal reasons why mature employees may continue working, and the organizational practices that may influence the decision of mature workers to remain with their organization. Secondary analyses studies of librarians in other types of libraries, especially academic libraries, would also be useful.

## **Conclusion**

The aging of the public library workforce in Canada is an indisputable fact; how public library boards and management teams will respond to this phenomenon over the next ten years should be of great interest to all library stakeholders. Recently, some researchers have pointed out that demographics should be of less concern to employers and workforce planners, and that the employment experience should be of greater concern. Numerous studies indicate that proactive workplace policies, which include fair and respectful treatment of all workers, and the ongoing provision of training, will greatly assist with retention of employees and help to alleviate potential shortages due to retirements. Our secondary analysis of responses of public librarians clearly indicates a high level of job satisfaction and job fit among public librarians. The development of an older worker strategy, and implementation of proactive work practices and policies as outlined, will serve to close the gap between what older workers value in their jobs and what is being provided by public libraries as employers. By doing so, public libraries will be in a good position to keep mature professional librarians within their workforce to facilitate knowledge transfer and to capitalize on their extensive knowledge and leadership skills.



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# Concluding Remarks

When the 8Rs Research Team began its work in 2002, it coalesced around a single issue: will there be a shortage of librarians in Canada due to retirement of a senior cohort of librarians hired in the 1960s and 1970s? Demographic evidence had indicated that the profession was ‘graying’ and it was inevitable that retirements would occur, but there was nothing but anecdote to guide the profession in dealing with the issue. It soon became clear that retirement was just one aspect of a complex relationship amongst factors affecting supply and demand of the librarian workforce in Canada, and that much more investigation was needed. Eventually the team determined that exploration of at least eight elements was necessary to address the state of human resources in libraries across Canada. Thus the 8Rs were named:

- Recruitment, to both the profession and to particular institutions
- Retention, or the length of librarians’ tenure within the industry as well as to an individual institution or position
- Retirement, to make some kind of prediction, grounded in research, regarding the size of the workforce over the next 5-10 years
- Reaccreditation, speaking to issues of entry-level library education (the Masters of Library and Information Studies)
- Rejuvenation, concerning issues of mid-career professional renewal
- Repatriation, based upon concern regarding whether Canadian librarians were leaving Canada for the then more-promising American job market
- Remuneration, in order to measure the extrinsic benefits of the profession
- Restructuring, regarding the ways in which library institutions might reorganize their staffing cohorts in order to deal with anticipated shortages, limited financial resources, and/or emerging technologies

A comprehensive research agenda was constructed and with the help of Marianne Sorensen and Jennifer de Peuter of Tandem Social Research Consulting these elements were explored in detail, including a survey of 461 library administrators and human resource managers, a survey of over 2,200 librarians and nearly 2,000 paraprofessionals (non-MLIS staff, excluding library clerks), in-depth telephone interviews with library administrators, and focus group sessions. The research was reported in detail in *The Future of Human Resources in Canadian Libraries* (<http://www.ls.ualberta.ca/8rs/8RsFutureofHRLibraries.pdf>). Of note are the human resources planning implications arising from the study. These implications are outlined below in the hope that their clear articulation will continue to promote thought and action on the part of the various library community stakeholders.

## **Workplace and Demographic Characteristics of Canadian Library Personnel**

- Sixty-two percent of librarians are working in a managerial function, indicating a trend of employing librarians as managers and the shifting some of librarians’ traditional job responsibilities to non-MLIS staff.
- A relatively high proportion of paraprofessionals working in part-time or temporary positions is a point of notice for library organizations. Taking a long view, which incorporates an understanding of anticipated retirement rates, institutions are advised to think about how they wish to configure the work status of their future workforce (understanding that there are other constraints, such as financial resources, collective agreements, etc.)
- While library work is female-dominated, we see that relatively higher proportions of senior administrators are male. This supports the premise that (as with many other female-dominated professions) although

women have made inroads into supervisory and middle management positions, men are still more likely to become senior administrators; institutions should ensure that equal opportunities in the upper levels of management and leadership are presented to women in the workplace.

- Visible minorities and Aboriginal staff are under-represented across all types of libraries. The Canadian Aboriginal population has been identified as an untapped source of labour that will become increasingly important in the future (Lamontagne, 2001). Institutions need to consider diversity programs if they do not already have them, and should explore recruitment strategies that actively attract minorities to their libraries. Institutions working with collective agreements should also examine how they promote or prohibit diversification of the workforce. This need to diversify the workforce also has implications for educators, in terms of how they promote recruitment to MLIS and library technician programs. Associations, too, should consider a role in promoting the profession outside the predominantly Caucasian demographics.
- Few library policies recognizing the professional credentials of non-North American graduates seems to be resulting in the hiring of few immigrant librarians. A greater awareness and understanding of this is necessary within institutions, as immigrants increasingly comprise a larger share of the Canadian labour force (HRDC, 2002). Library associations need to consider how they can support institutions in assessing and recognizing degree and accreditation equivalencies.
- School librarians tend to be older than other groups of librarians, and may be first to retire; the question is whether positions will continue to be defined as librarian positions or whether schools will sustain a trend of replacing librarians with library technicians and other library workers. Decision-makers must be reminded of the long-term implications of this replacement, as investment in school libraries and in teacher-librarian positions are related to better student achievement, improved literacy and reading skills, and enhanced readiness to success in the post-secondary environment (Haycock, 2003).

## **Recruitment**

- Current librarians tend to say that they chose the field because they thought they would like what the work entailed (though they do not state what these early assumptions were), and that they were interested in serving the public and/or the public good, as well as because of their value of literacy and learning. While these demonstrate a clear understanding of the core values of librarianship, they do not necessarily include the real functions of the job. Insofar as recruitment to the librarian profession is hampered by misperceptions about the work content of this profession, marketing directives should include an educational component that highlights the actual job functions and levels of responsibility held by librarians.
- Since structural barriers are the main reason why paraprofessionals do not pursue MLIS education (though one-third are interested), access to library education needs to be further examined.
- Library schools, MLIS students, HR administrators, and organizational trainers should also be made aware of libraries' unmet needs for librarians to be equipped to perform management and leadership roles and to be able to respond flexibly to change.
- Since recruitment need, activity, and level of difficulty widely range between sectors and geographic regions of the country, strategies should also be sector and geographically specific.
- For example, while CARL libraries (Canadian Association of Research Libraries) as a whole do not seemingly need to make major changes to their recruitment strategies, CULC libraries (Canadian Urban Libraries Council) are advised to consider marketing more rigorously to MLIS students (and perhaps to library school professors) about the benefits of working in public libraries. It is also important that they provide experience through practicum programs, internships, or co-op programs. The extent to which MLIS programs focus on librarianship within the public sector should also be examined.
- Rural libraries (which are predominantly public libraries) should focus their efforts upon promoting the desirable lifestyle of smaller communities and the opportunities for staff to use a wider range of skills. Knowing that retirements are coming up, rural libraries might foster a relationship with library schools and library technician programs that allows for practicum and other opportunities in their libraries. There is also the possibility that rural and remote libraries might consider "growing their own" and working with local schools to identify career opportunities in libraries for local community members.

- The continued use of temporary jobs for new librarian entrants, while better than the alternative of not offering a job at all, is a pattern that should be closely watched. The possible long-term negative effects on staff who continually work in a contract positions include the erosion of loyalty and trust and dissatisfaction; most temporary jobs do not engender a sense of being part of the organization, garnering neither training opportunities nor other employer benefits that are provided to others in the workplace.
- Since 41% of recent professional librarian entrants stated they applied to a U.S. job due to a perceived scarcity of Canadian positions, it appears that generally, Canadian librarians would tend to stay in Canada if the initial jobs were here (and perhaps in a permanent capacity). A much smaller proportion of respondents worked internationally, and then returned to Canada (primarily for personal reasons); this suggests that job market factors are not the only influence on international work. It also suggests that if there are an adequate number of good jobs for librarians in Canada, they may be less likely to leave in the first instance.
- The question remains as to how many institutions have reconsidered the MLIS hiring requirement for positions traditionally held by librarians. The ARL (Association of Research Libraries) states that about one-third of North American research libraries do not require the MLIS (Blixrud, 2000). If institutions are reconsidering this base credential for a greater number of positions, this could have a greater impact on recruitment.

### **Retirement**

- Age and rate of retirement of the librarian workforce is an exceedingly complex planning issue for libraries.
- It is influenced at the macro level by a federally-regulated pension plan and age-based social benefits with the issue of mandatory retirement still an outstanding question in many jurisdictions. Human resource managers would be advised to be very aware of age demographics and years of service of library staff. Most staff contribute to local pension schemes where entitlements are normally based upon an age/service factor for “full” pension. Attainment of this factor will also undoubtedly influence individual decisions to retire.
- It is vulnerable to local institutional policies that promote or delay retirements.
- It is very much a matter of individual choice; many retirement decisions could be based upon personal factors that are not predictable in planning. The 8Rs survey data suggest a number of critical factors that lead to great uncertainty for library organizations.
- Individuals’ predictions of retirement age seem to indicate that anticipated age of retirement is increasing rather than decreasing and that most individuals will be influenced by monetary variables, such as performance of investments and pension funds, which are very dynamic as well as differentially valued by individuals. This is substantiated by a recent poll of the Canadian labour force showing that the average age of retirement is trending upwards (Canadian Labour Congress, 2004).
- Most senior librarians (those who would be nearing retirement age) do not feel strongly either way about their age of retirement.
- Paraprofessional retirement rates will not be quite as high as librarian retirement rates, but will be happening within the same timeframe, thus compounding the number and impact of retirements that library organizations are dealing with.
- Libraries should develop and support communication and planning processes that allow individuals to discuss their retirement planning and its attendant impact upon the library organization as openly as they feel able to do so. This is especially critical in instances where retirement is no longer mandatory at age 65.
- Currently, only 10% of libraries have a succession plan. Knowing that the bulk of most institutions’ retirements (librarians and paraprofessionals) will take place from 2009-2014, organizations could consider undertaking a 10-year succession management process for human resources designed to anticipate and focus effort upon managing the effects of retirement. Succession planning and management will be complex for many library organizations. Libraries must develop the “know how” and commit the resources to do continuous planning and management. Some of the key considerations could include:
- Required competencies within libraries and within the individual institution (for both professional and paraprofessional positions).

- Potential for restructuring positions to fulfill institutional needs and employing new competencies, for both professional and paraprofessional positions.
- Recruitment incentives and marketing (both to the institution, and to library work in general) in light of the implied increased competition that will occur throughout the library community as a result of retirements. This becomes more urgent for institutions such as CULC libraries, who have stated that they face greater problems filling human resource needs both from within and beyond their current workforce pool.
- Library associations will be wise to think in similar terms, as retirements will impact membership, and the resultant change in demographics will undoubtedly reflect different expectations of the role of associations.
- Retirees take with them knowledge and skills that have been acquired through years of experience. Libraries will have to judge how critical this loss will be and how to ameliorate the effects. Succession planning will have to consider graduated retirement plans, mentorship programs, internships and other schemes that allow transfer of essential knowledge and skills.
- Grooming efforts for leadership/management should be taking place at all levels of the library organization, including new entrants (both professionals and paraprofessionals). Again, library associations must think in similar terms.
- Some sectors in particular (CARL and school libraries) are predicted to experience retirement rates above the norm. This must be communicated to decision-makers and funders, as it will place a large burden upon organizations to respond strategically, whether through recruitment or restructuring.

### **Retention**

- Turnover of staff is not a problem for most libraries. Factors contributing to retention include positive work relationships and challenging work environments, loyalty to the organization and its users, support and recognition for what librarians contribute, support for professional development and growth, more-than-adequate salaries and benefits, personal ties to the community, and location and reputation of the organization.
- As libraries tend to retain staff members for large portions of their careers, recruitment decisions are critical. Institutions need to set selection criteria that assess potential and ability to grow with the needs of the organization. New recruits need to understand how their career aspirations “match” the needs of the institution and assess whether the organization is a good fit for them.
- Lack of turnover is not a concern except insofar as it has affected upward mobility or promotion opportunities for librarians. Libraries can encourage employee growth by providing challenging assignments and additional professional development throughout their careers. If this is not immediately possible, individuals wishing to expand their skill sets and professional competencies can also look to professional and other associations for opportunities to build skill sets while making a professional contribution.
- Conditions exist for many new librarians to move into management positions early in their careers. Most librarians are interested in and feel qualified to move into more responsible and more senior positions. Upon recruitment, individuals need to be apprised of the management needs of the organization, and library organizations can support them through appropriate training, development and mentorship. Opportunities to experience and practice management tasks should be made available to new recruits so that knowledge and skill levels can be assessed early and appropriate career planning done. Library schools and library associations similarly have a role to play in ensuring that education and development opportunities are offered from first career choice and throughout the career span.
- Collective agreements and internal policies (as well as internal organizational and work structures) can impede or promote progression and professional growth. Institutions would be well-advised to examine these structures.
- Libraries must develop and support a culture where every individual is encouraged to play a leadership role in whatever position they hold. Institutions need to communicate what leadership looks like, what is expected of staff, and how staff will be recognized within their organization.

## **Education**

- Few librarians hold a library technician degree, suggesting that in the past, paraprofessionals seldom chose to pursue the MLIS. At the same time, we saw that one-third of paraprofessionals were interested in pursuing an MLIS, but half of these faced structural barriers. These two results present a situation in which movement from paraprofessional to professional status could be difficult within the field. The library profession needs to question how these difficulties might be ameliorated, and how recruitment of this interested group might be promoted. Individual institutions need to assess how their needs can be met by encouraging paraprofessional members of staff to acquire a professional degree.
- Institutional satisfaction with MLIS education is sector-dependent, showing that curricula may be less easily aligned with jobs in different sectors. CULC libraries' dissatisfaction with the MLIS degree as a basic competency warrants further study to identify how that workplace is significantly different. CULC administrators and library educators should consider discussing the gaps between MLIS education and CULC libraries' needs; while MLIS programs have other stakeholders and requirements and cannot tailor their entire curricula to the needs of particular sector employers, programs such as public library internships or practicum placements, co-op programs, linked assignments to public library practice, and more discussion of the difference between sectors may be useful here.
- The assessments of recent graduates should not be overlooked in evaluating the applicability of library schools' curricula, which is generally less favourable than those of the employer. That the sector differences in evaluation from the institutional perspective do not parallel the sector patterns found among recent graduates suggests that the viewpoints of both stakeholders are important to gather when conducting a comprehensive evaluation of library schools. Additionally, new librarians and employers would benefit from learning about the evaluative viewpoints of each, thereby furthering their understanding of the other's expectations in the workplace.
- An important exception to the divergent assessments of library school education between institutions and recent librarian entrants is the consensus of an increased need to incorporate management, leadership, and business training into the curriculum. The implications of this finding for library school curricula are clear.
- While libraries believe they have little or no input into MLIS education, we know there are different kinds of partnerships that can provide practical experience (e.g., practicum placements, co-op programs, internships, assignments linked to the "real world" of library work). Educators and employers may consider working together to build these opportunities. Also, while librarians have historically come to librarianship as a second or third career, recent statistics from the Association of Library and Information Science Education (ALISE) suggest that the average age of MLIS students is decreasing (from 34 years of age in 2001 to 30 years of age in 2003). Insofar as this means that contemporary students have less experience in the general workforce, further importance is placed on practicum programs or other forms of direct experience as part of the degree.
- Technicians show greater levels of satisfaction with their base education than do professional librarians which may be due, in part, to the fact that college programs have the ability to change their course offerings on a much timelier basis. Still, technicians are less likely to learn leadership and management skills through their programs. For technician positions that require management competencies (27% of paraprofessionals work in supervisory or management positions), employers should ensure adequate training is provided.

## **Continuing Education**

- Library administrators report significant proportions of librarians at all levels and across various types of positions continue to require significant amounts of training for their jobs. While new recruits require the most training, a significant minority of mid-career and senior librarians do as well. This suggests that individuals and institutions must commit to continuing education as an ongoing necessity. Institutions will most likely take up the financial costs of training and must plan for this budgetary commitment. Librarians must take the personal responsibility for participation and return of the investment in training to the organization.

- At the same time, just over half of new professional librarians surveyed stated that there are adequate opportunities for training at their institutions. This suggests some potentially serious gaps in these librarians' opportunities to gain the knowledge and skills necessary for their work.
- The largest gaps between institutional need and new librarians' perceptions of training opportunities fall within CULC libraries. At the same time, CULC libraries are also most likely to say that budgets prevent them from offering needed training. CULC libraries are therefore in a situation in which their need for staff training is high, but their ability to offer training appears to be low. CULC libraries need to investigate their institutional barriers to training and determine ways to overcome these barriers, perhaps by working in conjunction with other organizations (associations, partnering with other libraries, etc.).
- Of the institutional training offered to librarians, most frequently offered was that of job skills and technology training, with about half receiving customer skills or management training. However, one-third undertook leadership training. While leadership is a more difficult competency to "teach," institutions' stated needs for leadership abilities suggests that this is an area that warrants greater attention from individuals and institutions. Further, librarians interested in moving into higher positions state that leadership and management training are necessary for them to feel confident in performing these new roles.
- While 80% of librarians agreed that they have sufficient education, training and experience to perform their jobs effectively, when asked about the impact of training on their jobs, somewhat lower levels agreed that professional development allowed them to perform their jobs well. Also, relatively few institutions had formal structures either for determining what training is needed or for evaluating that training. Libraries and library staff should both question the return on investment from training activities and how this can be improved through training outcomes that serve the needs of both the individual and the institution. This return will assume even greater importance as increased retirements and recruitment occurs.
- While a very small proportion of librarians participated in the Northern Exposure to Librarianship Institute, they rated it as having a higher impact on job performance than other areas of training. Considering that leadership is a significant training need throughout Canadian libraries, more "leadership institute" models may be effective.
- Paraprofessionals overall are less satisfied with the training opportunities offered to them. Equal proportions of librarians and paraprofessionals receive technology skills or customer service training, but far fewer paraprofessionals than librarians receive leadership or management training. Leadership in particular is a competency that should be held by staff throughout the organization.
- Most libraries believe that library associations should play a training role. While they suggested that "general training" be provided by associations, respondents did not define this area any further. Associations would be advised to work with their memberships and other stakeholders in order to determine specifically what kinds of training is in demand for their sector/region, if they are to build upon their professional development programs.

### **Quality of Work and Job Satisfaction**

- Job satisfaction for both librarians and paraprofessionals is fairly high. For librarians, this satisfaction is slightly higher for recent entrants and senior librarians than for mid-career librarians. Across occupational levels, overall job satisfaction for all library staff tends to grow slightly as occupational levels increase. Still, the overall measure of job satisfaction and the many job satisfaction sub-indicators examined in this section suggest a very positive rating of the quality of work offered within Canadian libraries. This conclusion might be used as a promotional element to help attract individuals to the profession.
- Salary satisfaction levels, however, are a slightly different story. While 72% of all librarians agree that they earn a fair salary, non-management public librarians are least likely to be satisfied, with only 55% agreeing their salary is fair. Overall, paraprofessionals are less satisfied with their salaries (61%) than librarians. At the same time, the majority of paraprofessionals have high levels of education, with 50% possessing a university degree. And, we have noted that roles between librarians and paraprofessionals have been shifting within the workplace. When reviewing salary scales, administrators should consider both educational credentials and shifting roles.



- While salaries should be linked to both educational credentials and position responsibilities, if libraries' ability to pay higher salaries is circumscribed by budget limitations, they should examine the intrinsic benefits within the workplace and see how these can help offset lower salaries.
- Library paraprofessionals working in schools have much lower satisfaction levels with salaries as compared to school librarians. As the school library system attempts to survive the impact of cuts, school administrators should be very aware of not only the shrinking component of librarians in school libraries, but also the low satisfaction level of library technician staff (who may be taking greater responsibility for the library at a lower salary).
- While library staff empowerment overall does not appear to be a problem, it is higher for librarians than it is for paraprofessional staff. Again, considering the education levels of paraprofessionals and their changing roles, libraries should examine how local and global decisions are made in the workplace, and endeavour to involve staff throughout the organization, where feasible.
- Library administrators need to carefully watch both the workload and the job stress levels of their staff which appear to be increasing for both professionals and paraprofessionals.
- Key contributors to job satisfaction for library staff are:
  - Respect from supervisors
  - Desire to grow and learn new skills

These are congruent with library institutional needs to continue to innovate as they respond to changing user demands and new technologies. In order to build healthy workplaces, senior managers need to understand where their staff are both satisfied and dissatisfied, and provide opportunities to staff throughout the organizational hierarchy, while clearly communicating the limitations within which the institution must function (such as limited budgets, collective agreements, etc.).

### ***Numerical Librarian Demand-Supply Match***

- Libraries have an expressed increased future demand for librarians and paraprofessionals. Whether they can meet this demand by expanding their workforce depends in large part on the supply of librarians, but also on budgets and the ability to recruit.
- Above all, libraries need to develop a sound awareness of how their staffing complement is functioning, and to consider how their institution fits into the larger Canadian context of demand and supply. Administrators' and managers' understanding of how potential applicants are attracted to or deterred from their library and/or sector will assist with recruitment on an institutional level.
- For Canadian libraries as a whole, the short-term (5-year) prediction does not depart significantly from what has already occurred with respect to loss of librarians through retirements. Although 11% of the librarian workforce retired between 1997 and 2002, most libraries did not experience great difficulty in replacing retirement losses.
- The long-term (10-year) prediction is more troubling. But since it is a long-term prediction, it means that library stakeholders have more time to prepare for the shortage. Some of the suggestions are to continue to:
  - Look to see how recruitment to the profession can be improved upon. A coalition of libraries, library associations and library schools must act to promote both a current view and a vision for the profession—one that expresses the potential of librarianship as a career of choice and is attractive enough to capture students of high quality and commitment to the practice of a dynamic and changing profession. In looking to improve recruitment, the need for diversity within the profession must be of paramount concern.
  - Consider developing recruitment strategies for paraprofessional staff, with the understanding that demand for these workers will continue to grow at a similar rate to that of librarians, and that they will be retiring in similar numbers. This can be a point of potential collaboration for librarian and library technician associations, educators, and individuals.
  - Look at the current paraprofessional corps as a possible pool of future librarians. This is not only a matter of encouraging paraprofessional staff to consider a library degree but also of working to reduce

the identified barriers to obtaining the MLIS degree. Libraries, library associations and library schools need to work in partnership to develop and promote a model of professional education that is both of high quality and easily accessible. On-line programming and distance education programs are obvious directions to explore. Financial support, whether through scholarships and bursaries or “earn as you learn” employer-funded incentives, will be critical.

- Look at increasing the number of spaces in library schools (both MLIS and library technician programs), or increasing the number of schools themselves. This will involve intensive lobbying of post-secondary institutions and competition for government funding. Again, libraries and library associations must act in coalition with library schools to present the case for the profession.
- Look at immigrants as possible pool of future librarians. This speaks to the question of diversity in libraries, but also to how libraries will be prepared to assess and recognize library credentials from other countries. Library associations must also play a role in both the assessment of credentials and by ascertaining how they might fill any identified educational “gaps.” Similarly, library schools could play a role in appropriate educational upgrading.
- Look at defining roles for “other” professionals within libraries. Many libraries now utilize the skills of other professionals, whether accountants, human resource professionals or training officers. These other professional groups need to see libraries as a desirable environment for exercising their professional skills and abilities. As noted, management skills are necessary competencies for librarians. However, other professionals can take complementary roles in libraries, adding to the depth of expertise available.
- In recognizing that the creation of new professional librarian positions is not always possible, look at reengineering processes and functions to ensure that “meaningless” work is eliminated and all library staff are employing their education and skills set at appropriate levels. Staff should be assured that they will be able to employ their skills and abilities to the fullest possible extent.
- Constraints of budget and size will always exist. Therefore, libraries should also look to sharing of staffing resources through consortia and other local arrangements where two or more libraries might realize benefits and share costs. Sharing of resources has been the hallmark of the library profession for many years; the thinking needs to extend to the sharing of human resources--whether one webmaster for a college/university library partnership, one children’s literature specialist for two regional library systems, or one training officer for a consortium of libraries.

### **Competency Demand-Supply Match**

- Role change will continue to take place in libraries. Institutions need to carefully plan how they will restructure their staffing complements as retirements occur. The first step is to define needed competencies and determine what mix of staff will meet the present and (insofar as possible) future needs of the organization. However, we can say overall that the ability for staff to adapt flexibly to change will clearly be a necessary competency throughout Canadian libraries.
- Libraries need to cultivate librarians’ management, leadership, and in some instances, business skills. Interest in and potential for performing management and leadership roles could be a factor in recruitment of new librarians and grooming needs to begin shortly after recruitment, so that potential can be assessed and appropriately directed.
- Libraries’ emphasis on leadership and management also have implications for library education, with respect to both recruitment of students and curricula content. Opportunities for management and leadership within the field of library work can be highlighted as one method of attracting individuals with the desire to pursue these career goals.
- Mid-career librarians, particularly, need to send clear signals about their interest in managing. The lack of interest in supervising needs closer attention, suggesting that the supervisory role is not necessarily a role of choice for many librarians and that supervisory models and structuring of the staff complement in libraries needs to be closely examined.

- The large degree to which librarians and paraprofessionals overlap in job functioning is apparent. In designing jobs for both librarians and paraprofessionals, libraries need to carefully consider the level of responsibility attached to the job task or function. Clearly, paraprofessionals should not be performing to the same level of responsibility as professional librarians if they are not recognized or paid for doing so.
- Almost half of paraprofessionals indicate that they do not perceive they are treated with the same respect as librarians. Supervisors and managers need to ensure that they build and/or promote a respectful workplace that recognizes the contributions of all staff, and acknowledges the increasingly demanding responsibilities these staff perform.
- In designing jobs, the balance between the elements of managing/leading and working harder or working at a variety of more complex tasks needs to be carefully considered. The balance can be tipped and jobs made more stressful or more fulfilling, depending upon the relative proportion of the elements.

The 8Rs research began with the question of retirement of the Canadian library workforce and it was found to be an exceedingly complex issue. The best estimate, assuming a retirement age of 62 years, was that 16% of professional librarians would retire by 2009 and 39% by 2014. These levels of retirement would not prompt a crisis in the librarian workforce but were also viewed as extremely vulnerable to personal factors and monetary variables. The research found that most librarians nearing retirement age were ambivalent about their age of retirement; they could easily be tempted to stay (or constrained to stay if family economics were an issue) or might leave early if early retirement packages were an option. Given the recent downturn in the economy, it would be interesting to know if retirement decisions have been delayed, or not, and the resultant impact upon individuals and library organizations. However, the research also raised a host of related issues and, as seen in the implications that were detailed, these issues have been raised for discussion and debate within the profession. The professional community-- associations, institutions, individuals--are all implicated in the manner and degree of the response, and it has been encouraging to see the reactions that the 8Rs research has evoked and the support it has garnered.

### ***Community Response: Human Resources Summit***

From the beginning, a major objective of the 8Rs Research Team was to find ways of animating and disseminating the results of the study to the library community. Before the final results of the research were released in mid-June 2005, the 8Rs Research Team recommended that the Canadian Library Association (CLA) strike a group to examine the results of the research and discuss how they might be used to strategically inform and improve human resource planning in Canadian libraries. At the beginning of May 2005, then- President of CLA, Stephen Abram appointed the President's Council on the 8Rs, with former CLA President Wendy Newman as Chair and over thirty member librarians from across Canada, from all regions and types of libraries. The mandate of the President's Council was to examine the research and build awareness of the findings as well as suggest potential strategies and best practices that could be used by libraries engaged in human resource planning and management. Over the next two years, the President's Council established several working groups with defined projects and delivered a number of reports focusing upon broad and cross-sectoral issues such as recruitment, mentorship, availability of internships and practicum programs, and access to library education and professional development.

In discussions between the President's Council and the 8Rs Study Team, a critical adjunct to the research and work of the Council was voiced — how to institute a dialogue that would build a national infrastructure of support for strategic actions and activities on both a sectoral and cross-sectoral basis. Finally, it was decided that a National Summit, one that would involve other Canadian library associations, was the best vehicle to initiate such a dialogue and a Steering Committee with broad representation from the various associations was struck to organize the National Summit on Library Human Resources.

The Summit was designed with a specific outcome in mind: to identify the strategies and key actions required over the next five years to move toward the goal of ensuring an adequate supply of well-educated, well-trained librarians and information professionals to meet Canada's knowledge and information management needs in the first three decades of the twenty-first century. Over a hundred librarians, library leaders from all sectors of Canada's library industry were invited for a two-day Summit that took place in Ottawa, Ontario on October 6–7, 2008. The structure of the Summit allowed for invited speakers but also dedicated the majority of the first day of the Summit to facilitated break-out groups that sought to identify promising strategies and then shared them in

plenary. On the second day, break-out groups convened again to discuss implementing the strategies, including desired outcomes, key actions and identification of potential leaders of or contributors to the strategies. The latter part of the second day focused upon how the library community could move forward in a collaborative and coordinated way with association leaders asked to present their ideas and strategies in plenary. An innovative aspect of the Summit was the inclusion of seven bloggers; these new professionals had been invited to attend the event, record the proceedings and blog about them after the course of the Summit.

How are associations, institutions and administrators using the 8Rs research to strategize and to address the human resource needs of the profession in a coordinated approach? Some specific community responses can be documented. The Canadian Association of Research Libraries (CARL), for example, established the Library Education Working Group (LEWG) in 2006, with a mandate to create relationships with those interested in library education and research, outline the next steps for taking identified priorities forward, identify actions arising from the recommendations of *The Future of Human Resources in Canadian Libraries*, and to make recommendations to the CARL Board. The LEWG *Final Report to the CARL Board of Directors*, including 17 recommendations for action, was presented in May 2008. More recently, in January of 2010, the COLISE (Canadian Collaborative Online Library and Information Science Consortium) was formed by the eight library and information schools in Canada to deliver online library and information science education. The formation of this consortium was in accordance with a commitment affirmed at the National Summit on Library Human Resources.

What will be the long term-impact of *The Future of Human Resource in Canadian Libraries*? The profession continues to grapple with those complex and inter-woven elements, the 8Rs, first defined in the study. Seemingly, these factors are still front and centre in the thinking of many Canadian library associations and leading individuals. Most gratifying has been the number of articles and works of others that cite the 8Rs study. When the 8Rs research was first published, it was referred to as huge, and rich, and deep. This data needs to be renewed and specific questions around the 8Rs re-formulated to assess the degree of change that has occurred since the data was originally gathered in 2002. Even so, only the surface of the current data has been mined for human resource implications; much more analysis can be done and more insights garnered. Strategic actions, however, are always the key, and institutions and associations must commit to recruit, retain and develop a committed and talented workforce in order to maximize the wealth of opportunities that are seen in the library sector in Canada. The challenge to the community can be summarized in the question, “What are you prepared to do to ensure that libraries in Canada are engaging in pro-active and best practices for human resource planning and management?” The strategies that arise are critical to the continuing health and productivity of Canadian libraries; they must be research-based and collaborative in nature if all libraries are to prosper.

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