

My Ideal Vision:

Managing and Leading the Perfect Library

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INTRODUCTION

The subject of my ideal vision is the Jane Jacobs Memorial Library and Archives, a theoretical institution devoted to the collection of urban history and planning materials. It would presumably be affiliated with a major university, and would employ professional staff, student workers, and volunteers. I, of course, would be the director.

The four primary components of the Jacobs Library collection would be as follows:

1. Planning and urban history texts, including numerous rare books and unpublished theses and manuscripts.
2. A collection of master plans and other planning documents from around the world.
3. An extensive map collection, primarily detail maps of urban areas, dating from 1750 to present.
4. A large photographic collection.

THE THREE SECRETS

1. Decide What You Want

My primary vision for users concerns both on the physical library and archives and on the extensive online version of it that I plan to develop. The Jacobs Library will distinguish itself from other archives by providing an inviting presence, both at its physical location and online, and by being considerably more accessible than other archives. Arriving at this ideal will involve attention to specific physical details as well as staff involvement and “buy in”

In the physical library, an inviting presence means proper signage, lighting, comfortable reading areas, tables for map viewing, and a user-friendly photo catalog and organization system. For the online library, important aspects include ease of navigation, graphic resizing tools and viewing options, relational links within records, tagging (possibly even user tagging) of items, and a fully ADA compliant interface. In both cases, the archives will also be more accessible than most, with more user-friendly operating hours, minimal usage restrictions, open browsing, and the largest possible proportion of the collection available online.

This vision will require a staff that is enthusiastic about the goals of the library, interested in its subject matter, and completely invested in its growth. A passion for urban planning and history, and an absolute dedication to customer service will be essential components of my hiring and retention plan.

Among my most important ongoing performance goals would be the following:

1. Digitization of all new materials as they are acquired, and digitization of at least five percent of appropriate preexisting materials every year.
2. Minimization (and ultimately elimination) of requiring advance appointments for users.
3. Minimization of material usage restrictions.
4. Community outreach involving planning agencies and academic departments (history, geography, and others) at all local colleges.
5. Training for everyone on back-end operations and on the collection before placement in a patron contact position.

2. Discover What the Customer Wants

The Jacobs Library is a very specific institution catering to a very specific clientele. I want to provide everything necessary for research in the specific areas of urban planning and urban history. Jacobs is not about general history research, genealogy research, nor market research. Within this framework, I would solicit feedback from our clients through user surveys, assigned liaisons to local colleges and planning departments, informal chats with our “power users”, and the use of multiple online statistical applications.

User surveys will be solicited from all users of the website at periodic intervals. In addition, bookmarks will be printed with links to the web survey and will be given out to patrons of the physical library during survey periods. Surveys will measure user wants and needs as well as satisfaction with the library. At all times (even non-survey periods), the library will also emphasize my contact information, with my goal being to respond to all patron issues within 24 hours. By quick and personal response, I will not only keep patrons happy, but also be more likely to hear about problems or concerns that might not otherwise be expressed.

One-on-one communication will be accomplished through liaisons who are assigned to be points of contact for local university programs and planning departments. In the absence of other communication, liaisons will be expected to speak with their contacts at least once a month for informal discussions of the library’s services, the user’s wants and needs, and the like. These informal discussions are more likely to uncover (and allow elaboration on) issues that might be missed or “glossed over” on standardized surveys. I will also provide follow-up myself from time

to time, both as a means of introducing myself to these users, and to get more feedback on problems or areas of concern.

Usage of the website will also be examined through usage and search statistics (aggregate only, with no individual user information studied) and through devices such as “was this information useful” checkboxes and feedback links on individual site pages and search results. These statistics will guide the library as we prioritize materials for digitization in coming years.

3. Deliver the Vision Plus One

As previously stated, the Jacobs Library will differentiate itself primarily through increased access to materials -- both online and in the physical library -- through more user-friendly access policies and hours, emphasis on rapid digitization, and fewer usage restrictions.

As far as possible, I want to avoid requiring users to make appointments to use the library’s facilities, and for them to be able to do so at their own convenience. In the early years, staffing may not be sufficient to allow this consistently at all times, but as a start, we would consider programs like “walk-in Fridays”, providing one day a week where sufficient staffing is always guaranteed. Hopefully, the number of days would ultimately be increased, until the entire schedule was appointment-free.

Another important access priority is to provide open stacks and browsing of the collection wherever possible. I don’t want our patrons to have to ask for every item they want; this will ultimately make life more pleasant for them and for the staff, and will facilitate increased use of the materials. Open browsing will be the eventual

goal for all materials, which will be facilitated by digitization initiatives, but we will probably start with bound material in the stacks.

Rapid digitization of all materials as acquired is perhaps the most important priority, as it allows users to access the materials outside the physical library, and also provides digital surrogates which can be used to facilitate the goal of open browsing *within* the facility. Many of the materials in the collection are government documents, and therefore not subject to copyright restrictions, which is a bonus for online access. In addition, the library will operate where possible under a Creative Commons License, minimizing usage restrictions on all items, at least for non-commercial use. Consistent with the *Raving Fans* approach, my strategy is to master digitization first and provide that consistently, and append extras - for example, integration of Geographic Information Systems technology into our map collection - later.

THE TWELVE QUESTIONS

Base Camp: What Do I Get

1) *Do I know what is expected of me?*

I would provide my workers with specific and realistic job descriptions at the outset, with a focus on outcomes over processes. For example, a scanning technician's job description might stress output quality guidelines and productivity goals rather than specific tasks, while a reference librarian's might be more focused on specific customer service goals. Job descriptions would be tailored to the individual, and would be reassessed on a quarterly basis as part of an ongoing dialogue about

performance and career development which takes into account both the individual's strengths and the library's needs. This feedback system, which I will discuss in more detail later, is perhaps the most essential component for setting expectations.

2) Do I have the materials and equipment I need to do my work right?

Again, in this area it is necessary to focus on the basics first. First and foremost, workers need pens and pencils, sufficient desk and storage space, usable computers and software that works. These must come first, possibly even before acquisitions budget, because without the proper tools, the library will not function, and the staff will revolt.

Camp One: What Do I Give?

3) At work, do I have the opportunity to do what I do best every day?

In my view, this starts as a recruitment issue. Pre-employment screening should match skills and talents to specific jobs. If an individual is weak in the area of customer interaction, she probably should not be placed in a customer contact position. Of course, this is not always obvious from the beginning, and people sometimes change or develop additional skills. This is where the ongoing feedback dialogue comes into play, allowing for a periodic reassessment of strengths and weaknesses.

I would also attempt to shape the concept of "doing what I do best" by starting all new front-line (customer-facing) employees with a training and orientation in back-end operations (cataloging and digitization), for two reasons. First, I want everyone in the library to be fully familiar with all aspects of the collection. Second, some workers may realize that they are better suited to some of these behind the

scenes position and may want to pursue training opportunities that would prepare them to move into these areas.

4) In the last seven days, have I received recognition or praise for doing good work?

In weekly staff meetings, I would institute an “accomplishments summary” as an agenda item every week, in which I would either recognize at least one positive contribution from each staffer, or would encourage the staff to submit their own recommendations and recognize each other’s contributions.

5) Does my supervisor, or someone at work, seem to care about me as a person?

To care about someone, you have to get to know him, and to get to know him, you have to talk to him about something other than work. It doesn’t matter if it’s in a social situation or in the hallway outside your office, but it’s also not something you can really fake.

6) Is there someone at work who encourages my development?

I would start a mentoring program, where new employees are paired with more experienced ones who may have complimentary skills and talents, in the hope that both parties could learn from each other. Feedback about the partnership and maybe even shared goals for the pair would be integrated into the feedback dialogue sessions, and the partnerships could also be reassessed for maximum benefit to the individuals.

Camp Two: Do I Belong Here?

7) At work, do my opinions seem to count?

Any manager who does not solicit honest employee feedback is in danger of being both uninformed about his organization and resented by his team. A manager

who solicits feedback but ignores it is wasting his time and that of his employees. I would hope that the ongoing dialog between managers and employees at Jacobs would result in a regular sharing of opinions, but I would also introduce a more formal means in the form of a quarterly or semi-annual anonymous feedback survey. The results should not only provide a meaningful snapshot of employee viewpoints and allow some “venting”, but should also alert me as to whether or I am getting the full story from the more informal communication sessions. If I’m greatly surprised by anything I read in the anonymous surveys, there’s probably a communication issue somewhere.

8) Does the mission/purpose of my company make me feel my job is important?

This should be a part of the process. In a perfect world, the library would only be hiring people who already feel some connection to the library’s mission and an interest in its operations. The important thing is not to misrepresent the mission and goals to new hires, nor to change it suddenly and without discussion afterward.

9) Are my co-workers committed to doing quality work?

A commitment to quality work is a basic requirement for continuing employment at Jacobs; inconsistency of work is not fair to those who value quality, and it causes a lowering of standards and initiative throughout the organization. I would expect my team leaders to know whose work was above or below standard and to act accordingly before trouble and resentment were allowed to grow.

10) Do I have a best friend at work?

The “social issue” is tricky. While I would not institute policies to discourage socializing among employees as some companies do, I would also not engage in

“forced socialization” activities if they were clearly unpopular. Parties and group activities should be held, whenever possible, within regular working hours, both to give people a break and a change of pace, and to allow them to spend their off hours the way they choose to do so. If they choose to socialize with each other during off hours, so much the better, but requiring it and cutting into personal time to do so will only breed resentment.

Camp Three: How Can We All Grow?

11) In the last six months, has someone at work talked to me about my progress?

Again, conversations about progress should be constant and ongoing. If supervisors are really talking with their employees on a regular basis, this will obviously be one of the topics of conversation. However, a more formalized discussion, say during quarterly or semi-annual performance reviews would also be helpful, and would also help uncover any surprises or lapses in communication.

12) This last year, have I had opportunities at work to learn and grow?

Training should be an ongoing process, and should be focused on sharpening skills rather than on correcting “errors” which are often more likely to be non-talents that should have been considered during the hiring process. I would send people to advanced training as a reward and a stimulus to improve in areas where they have already excelled (and therefore have demonstrated a talent for) rather than as forced reeducation seminars.

MY TOOLS

Strategic planning

Strategic planning will obviously play a major role in the development of Jacobs Library. Following are some sample highlights from the strategic plan:

<p>Mission Statement: Facilitating the study of urbanism through information, research, and collaboration between institutions.</p> <p>Values:</p> <ol style="list-style-type: none">1. High quality, accessible information.2. User-centered focus.3. Team-centered leadership.4. Collaborative spirit. <p>Goals / Objectives / Outcomes:</p> <ol style="list-style-type: none">1. Maximum accessibility of information<ol style="list-style-type: none">a. Provision and promotion of digital content online.<ol style="list-style-type: none">(1.) Digitization of all new materials as acquired.(2.) Digitization of 5% of preexisting materials per year.b. User-friendly access policies.<ol style="list-style-type: none">(1.) Conversion of all bound titles to open-stack browsing by January 2009. <p>Opening one day per week of appointment-free access by March 2009</p>

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 - (2.) Digitization of 5% of preexisting materials per year.
 - b. User-friendly access policies.
 - (1.) Conversion of all bound titles to open-stack browsing by January 2009.
 - (2.) Opening one day per week of appointment-free access by March 2009.

Budgeting and include example of a one year budget

The first year budget would take into account many startup costs, such as initial scanners and furnishings, while later years would have lower fixed costs in these areas but increased salary numbers. As stated earlier, budgeting may well place a higher priority on staff needs and technology than on collection development at times, based in the library's mission.

Reference Assistant	\$ 29,500.00	33%	\$ 39,235.00
Student Staff 1	\$ 5,000.00		
Student Staff 2	\$ 5,000.00		
	\$ 384,500.00		\$ 537,585.00

Technology	Cost	#	Total
Computer Stations	\$ 1,200.00	10	\$ 12,000.00
Desktop Scanners	\$ 175.00	4	\$ 700.00
Oversize Scanners	\$ 1,450.00	1	\$ 1,450.00
Databases	\$ 10,000.00	1	\$ 10,000.00
Digital Photography Setup	\$ 8,700.00	1	\$ 8,700.00
Software Upgrades	\$ 5,000.00	1	\$ 5,000.00
		Sub total	\$ 37,850.00

Furnishings & Fixtures	Cost	#	Total
Initial Fixtures	\$ 37,500.00	1	\$ 37,500.00

Collection Development	Cost	#	Total
Photo Acquisition	\$ 32,000.00	1	\$ 32,000.00

Total \$ 644,935.00

Needs Assessment and Evaluation

Needs assessment is essential to Raving Fans secret number two, not to mention to the concept of emotional intelligence. How can you know what your clients (or employees) want and need if you don't communicate with them regularly?

As previously stated, Jacobs Library will examine client needs through user surveys and website statistics, but also through the community liaisons and informal client discussions. Internal customer (employee) needs will be measured through ongoing communication and quarterly (or semi-annual) anonymous surveys.

Quality Control and establishing a Quality Management System (QMS)

Since a production environment (for digitization and web content production) is a major part of the Jacobs Library, a quality management system is perhaps even more essential here than in other libraries.

I would promote quality control throughout the production process, either through specific tracking and reporting software, as the budget allowed, or even through an open source system such as a discussion board or wiki available on our intranet, which would allow for discussion as to how to improve or eliminate problem areas. The primary goals, of course, are (1) to make certain that quality checks are continual and occur at all stages of the process, not just at the end, to foster a preventative approach, and (2) to make certain that the process is easy and straightforward, lest it not be used at all.

HIRING A NEW STAFF USING THE FOUR KEYS

1. Select for talent not simply experience...

First, I would select not only for individuals with specific talents, but for talented individuals with a passion for the library's mission of promoting urban history and planning research (knowledge, if you will). I want people who are passionate about this and can discuss it intelligently, which will help them "buy-in" right from the start. Specific experience is necessary for many of the more technical positions, but talent is more important, particularly with respect to the client-facing positions. I would seek individuals with strong interpersonal talents and skills: a "people orientation" or "love of people" is more of a talent, while many of the specific skills for dealing with people can be learned to some extent. The interview process would involve open-ended questions, and listening for specific cues. In fact, hiring the interviewer herself would be one of my biggest challenges.

2. Define the right outcomes not the right steps

Assuming I have found talented and competent individuals, my function as a manager should be more to define what they should be doing rather than the specifics of how they should do it. Of course, the outcomes must be specific, must be measurable (standards), and must have some sort of timeframe (productivity). Some positions may permit a broader framework than others -- a research librarian may have somewhat more latitude than a scanning technician - but the focus must always remain on the outcome. Presenting a job description where the "bullet points" focus on outcomes rather than tasks lets people know where they stand from the beginning.

3. Focus on strengths not weaknesses

Focusing on strengths will allow me to have more positive interactions with my employees, and also will permit me to spend more time with (and learn more from) my best workers. Managing weakness is a part of this as well; as a manager, I would need to understand the differences between weaknesses that can be improved (skills and knowledge or “trigger” issues) and those that can’t (non-talents). I would do all I could to correct the former, but the latter would involve more drastic steps, such as reassignment to a better fit or even termination. As with all things, constant communication would help me understand strengths and weaknesses among my employees and to manage accordingly.

4. Find the right fit - not simply the next rung on the ladder.

With a relatively flat organizational chart and a staff where everyone is exposed to almost every position at some point, it may be easier to avoid the temptation to simply “move up” whether or not the next step is appropriate given one’s talents. The Peter Principle, where one is promoted to the level of one’s incompetence, is to be avoided at all cost. In Jacobs Library, I would promote based on talent, and never assume that success at completing one role naturally predicts success at managing others in that role, etc. I would also understand that not everyone wants to advance past a certain position, and make sure that all roles were treated with respect (“heroes in every role”), and that adequate financial *and* professional growth opportunities are made possible within each role (“widebanding”), as far as practicable.

SUPPOSE I'M NOT "THE ONE IN CHARGE"...

Almost all the suggestions and concepts in both *Raving Fans* and *First Break All the Rules* come down to the very simple concept of listening to people, understanding them, and getting to know them. This applies to customers and coworkers, and it's not something one needs to be a manager to do. Anyone can practice the platinum rule (do unto others as they would like be done to) with great results. If I am tuned into the needs of my customers and coworkers, our lives are generally going to be better no matter what the philosophy of our supervisors and other "higher ups". Of course, it's essential to know what you have the *authority* to do when specific tasks are involved, but the principle remains the same.

CONCLUSION

The concepts discussed in *Raving Fans*, *First Break All the Rules*, *Emotional Intelligence*, and *Creating the Customer-Driven Library* provide an extremely useful framework for leading a small or large organization.

Again, it all comes down to communication and understanding the needs of your employees and clients. To create raving fans, I would start with my vision of a library and archives with superior access to materials, community outreach, and a strong user focus. I would determine my clients' want and needs within this framework, and then exceed their expectations by providing a better version than anyone else.

I would treat my employees the same way, maximizing their participation in my ideal by also taking their needs and wants into account. I would hire for talent and passion, and would help my coworkers grow based on their strengths rather than dwell on their failures. I would expect (and stress) results, and not micromanage steps and processes along the way.

By focusing on my mission, my goals, and my outcomes, and understanding the way all are affected by the needs of my clients and employees, I would expect to have an outstanding institution.

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