



Workforce and
Succession Planning
in the
Libraries of the
Australian Technology
Network

UniSA Library:
Preparing for
Demographic Change

November 2004

Whitmill
& Associates

UNISA Library's Workforce Vision
Diverse and Flexible
Inspired Leadership
Integrated
Advocacy
TechnoVisionaries
Organizational Relevance

Introduction*

The UniSA Library is experiencing many of the same workforce and succession planning issues as its ATN Library colleagues:

- an ageing workforce (almost 50% of its workforce is over the age of 45 with an under-representation of staff under 30 years of age)
- difficulties in creating a balance of staff with diversity of age, skills and cultural background
- difficulties in having staff broaden their work experience
- concerns about 'elitism,' allowing staff with potential to be given special focus, development and training
- ensuring appropriate and competitive reward and recognition schemes
- a workload that allows minimal time for training and professional development.

Specifically, UniSA has:

- difficulty recruiting librarians to the Adelaide area
- a considerable number of staff on employment contracts
- a number of locations, making it difficult for the Library staff to work as a single group and for management to communicate with them
- an uncertain future for staff with the ongoing reorganization and upcoming retirement of the Library Director.

The UniSA Library has undertaken a number of activities that demonstrate its commitment to workforce and succession planning. These include:

- a strong performance management system
- support and encouragement for young graduates and new librarians to be involved in library association work

*This report is to be used in conjunction with "Preparing for Demographic Change," the main report for LATN (October 2004).

- support and encouragement for non-qualified staff to get appropriate education
- an organizational learning program for internal and external training courses
- an orientation programme that introduces new staff to departments across the Library.

As well, UniSA's Human Resources group and the university as a whole have an interest in succession planning and have developed a number of initiatives to support this, including setting priorities for youth and Indigenous employment and goals for academic staff qualifications and the hiring of women to senior positions. The Library is participating in a university-wide performance management system pilot programme.

The Vision for UNISA Library's Workforce

In July 2004 Vicki Whitmell conducted two planning workshop with members of UNISA's Library staff. The first workshop group was made up of managers. The second group consisted of Library staff, many of them at the earlier stages of their careers. While there were many similarities in the vision that the two groups identified for UniSA's Library workforce, differences were clear.

Management Group

The manager workshop group was asked to identify what they would like UniSA's Library workforce to look like in the future. As is shown in the Appendix A, the main characteristics of the workforce that are desired are an organizational culture that fosters risk taking, entrepreneurs, extroverts, leaders and innovators, aptitudes and attitudes for lifelong learning, communicating, flexibility, optimism and ambition. Other characteristics that are valued include skills in teaching, technology and management (planning, strategy, leadership), organizational learning, 'technovisioning,' and diversity (age, gender, language, Indigenous, multicultural). Having staff with skills relevant to the university as a whole, in particular, teaching and higher degrees, was also seen as important. Managers also recognized that staff should feel that they are valued by the organization, are understood and listened too, are well-trained and are happy.

Staff Group

As shown in Appendix B, this group valued approachable and inspired leadership. Staff want leaders who are strong advocates for the staff and the Library and are visible in the wider community. The staff group also desired a workforce that is diverse and flexible, that is enthusiastic, open to new ideas, agile and evolving and flexible and adaptable (at all levels). They saw the need for more younger staff.

The staff workshop group felt the need a greater team focus and individual staff who are team players. Teams should be cross-function and less 'tribal,' or departmental-based. There should be more integration with other university services and delivery units. This group also valued trainee positions, leadership development programs, and staff who are technically savvy and socially and technologically aware. Like the management group they saw the need to continue to learn and evolve.

Making the Vision a Reality

The UniSA Library management group did not have the time to consider the obstacles to making their vision a reality, but the staff group did. The obstacles they identified included the organizational culture, bureaucracy, rhetoric and reality and lack of resources. This group saw the organizational culture of the Library and the university as one that is ingrained and that undervalues its staff. They were concerned about communication and leadership and the need for a neutral forum for discussion. They were also concerned about the immobility of staff, many of who are unwilling to move up or move on. Some felt a lack of trust which has resulted in self-censorship, fear and a negative image of the Library.

They noted the difficulty in completing the organizational learning forms that are needed when applying to take training or professional development. At their level this group saw AUQA (Australian Universities Quality Audit) as a hinderance to innovation. They also felt that reporting and accountability levels were an added burden of bureaucracy in the university.

Rhetoric and reality comments related to communication in the Library. They wanted more clear and regular communication from management.

Strategies

As outlined above, the UniSA Library has in place a number of programmes and activities that support workshop and succession planning. Expanding and adding to these programmes is essential to UniSA's long-term planning initiatives.

- **Orientation to the Flexible Delivery Department**

This programme allows librarians new to UniSA to work in the Flexible Delivery Department, a model for efficiency, innovation and external contacts. Broadening this programme so that staff can work with other departments on special projects or for job shadowing should provide good learning opportunities as well as create greater understanding of the work done at other Library sites. Staff should be encouraged to identify opportunities on their own and ask directly for short term assignments to meet goals identified in their individual career plans. Secondments should also be made available for staff to take advantage of.

In addition, UNISA should consider:

- **Once a Year Hiring**

This model is in place at Curtin University Library and Information Service. It allows Curtin to take a 'big picture' approach to ensure that positions are not hired for in isolation of the need for skills and attributes across the Library as a whole. Until filled, short term contracts or secondments could be used for the vacant positions. If this is not possible, the UniSA Library should at least consider the need for all hiring at the senior level and to consider all vacancies in view of the larger needs of the Library as a whole.

- **'Broadbanded' Classification Levels**

This approach is in place at UTS and QUT. Staff are hired at, for example, a level 5-6, rather than a level 5 only. Broadbanding will allow UNISA to offer more competitive

salaries and provide more room for staff to move upward. Rising within this broader salary range is best done through peer review and/or attaining a certain 'advanced' skill set or expertise. The result should be a better quality of applicants for positions and greater commitment by individuals in their personal development, especially those who are seeking to advance within their salary range.

• **Long-Term Recruitment Strategy**

UniSA should be running a long-term recruitment campaign that will encourage qualified people to consider re-location to Adelaide. While vacancies may not be available now, identifying people who may be interested in working for the library in the future is important, especially as today's workforce reaches retirement and there will be greater competition for those to replace them. Possibilities for such a campaign include:

- Keeping in touch with alumni so that they may assist in identifying potential candidates or consider returning
- Continuing to demonstrate that UniSA is a great place to work and that it is supportive of young staff through presentations at library conferences, hosting conferences and supporting young staff to participate in associations at the local and national levels
- Encouraging staff to talk to others about joining UniSA and to prepare themselves for future job opportunities
- Be known as a good employer.

• **Prepare for Upcoming Change**

The upcoming retirement of the Library Director may bring considerable change to the Library. It is likely that an organizational review of the Library will be undertaken on or near the retirement of the Director. As reviews can be extremely stressful for staff, planning should begin now by working with staff to identify likely areas of discussion and to get them thinking about their role in the review. Looking at other recent university library reorganizations should give an indication of possible outcomes. Planning should help to reduce staff concerns about the future and help them to look inward at their own aspirations and abilities.

Given the recent hiring of directors in other ATN libraries (e.g. RMIT, Curtin, Auckland) it is possible that leadership could be hired from outside. This is a general trend, with organizations looking to bring in new perspectives and ideas. With the small number of university librarians looking to relocate or take on additional responsibilities, the candidate pool might be quite small and may be expanded to include librarians from outside of the academic or library sectors. Staff should be prepared for such an eventuality.

Staff, particularly management staff, should also be prepared for an interim period between retirements and the filling of vacancies. Consideration should be given to this possibility with the development of a plan that considers such interim periods as an opportunity for staff to take on new responsibilities and to gain new experience.

• **Communication**

Given the size of the UniSA staff and its large number of locations, it is important that an effective internal communication plan be in place for management to communicate with and gather feedback from staff. Communication is always one of the most difficult areas for management and staff to agree upon. As an example, at

another ATN library a weekly email newsletter is sent to all staff about Library activities. Rather than seeing this as positive, many staff viewed it as overload. Finding the balance about what needs to be told, how often and in what way may be difficult. Trying different ways, e.g. regular meetings with senior management, monthly email updates, formal print newsletters, focus groups, etc. The Director's 'fireside chats' are a terrific idea and should be continued over the long term. It was noted that staff seemed to appreciate the opportunity to be part of the succession planning focus groups and were quite open in their comments and suggestions.

Recommendations

The main report to LATN outlines a number of recommendations for ATN libraries to consider when putting together their workforce and succession plans. Each Library's plan will be different and will be based on their particular needs. UniSA should build on its current practices as outlined at the beginning of this report and the strategies outlined above. In addition, a number of the key recommendations should be included as the core elements in the UniSA Library's workforce and succession plan. Others may also be added. The core elements recommended are:

1. The UniSA Library should expand and strengthen its staff plan into a written workforce and succession plan. This plan should be identified as a priority in its strategic plan and be recognized as such by the Library and its senior management. Sections that could be included are: identification of long-term future needs and details on expectations of managers and staff, available resources, objectives, and how success will be measured over the short and long term. (Recommendation 1.1) (Recommendation numbers refer to the recommendations in the main LATN report.)
2. As part of this plan, UniSA should conduct an inventory of skills, aptitudes, and attitudes needed by the Library for both the short and long term. The inventory should identify areas of weakness and the focus for future recruitment and professional development. (Recommendation 1.2)
3. All staff should be involved in thinking about and preparing themselves for the future workforce. This includes being compared with and evaluated on the selection criteria of the job as it would be written today. (Recommendation 1.4)
4. Communicate the plan. By letting staff know about the plan, it shows that their contributions are valued, that the future of the Library is being considered and that staff and their role in the Library's future are being paid attention to. (Recommendation 1.5)
5. Demonstrate the benefits. Part of communicating the plan will be to show how the Library and its individual staff will benefit over both the short and long term of having a plan in place. (Recommendation 1.6)

6. Measure success. There should be a number of measures for UniSA including having:
 - more and better qualified candidates (especially for non-professional positions)
 - more staff interested in workplace mobility, secondments and development and training opportunities
 - staff being better prepared for promotion and/or developing expertise
 - excellent internal and external candidates for key positions, and
 - staff with more outside experience.

Determining these success measures and how they will be evaluated will be an important part of the plan. (Recommendation 1.7)

7. Ensure that selection and promotion criteria focus on learning agility, personal attributes and leadership qualities. A balance must be maintained between these criteria and needed technical or professional skills. (Recommendation 2.1)
8. Reduce hierarchies within the Library and its departments as a way of giving people greater responsibility at the individual level and creating a more attractive organization for younger workers who prefer flatter structures. (Recommendation 2.7)
9. Be willing to hire staff from public, special and college libraries. Be also willing to hire those without specific sets of skills or experience, but with potential. (Recommendation 2.10)
10. Encourage staff to take a proactive stance in their own career development and evaluate their progress during their annual performance review. Work and activities that contribute to priorities in planning should be reviewed as part of the annual evaluation. (Recommendation 4.1)
11. Encourage staff to have short, medium and long-term action plans for development, recognizing that these plans will need to be updated regularly (Recommendation 4.3)
14. Consider forming a professional literature club to discuss articles and reports from the library literature and how ideas from them may be used in the Library. (Recommendation 4.12)
15. Identify staff with leadership and management potential. The identification of these people should be done at the senior management level with input from supervisors, managers and peers. Some of these people are obvious already and have shown themselves to have the energy, ability and enthusiasm to be introduced to greater challenges. Support their activities and, when the time is right, discuss possible future roles with them at UniSA. (Recommendation 5.1)

16. Create a work and career path development plan for those identified to ensure that they are able to build their skills and capabilities over time as needed. Find ways to give them responsibility for staff and budget, including working with special project teams, external university teams and opportunities for exchanges and secondments (inside and of the outside library and inside and outside of the university). (Recommendation 5.3)
17. A mentoring program is not currently in place at UniSA. Rather than setting up a formal mentoring program, staff who have indicated that they are interested in being mentored or who have been identified as potential managers or supervisors, should be encouraged to develop mentors within their own networks. Advice and training should be given to the mentoree on how best to find and work with a mentor and time should be given to pursue the mentorships. (Recommendation 5.5)
18. Continue to get staff involved as much as possible with local library education programs. Offer assistance in the rejuvenation of the programmes as faculty retire. (Recommendation 6.1)
19. UniSA should participate with LATN and other Library associations, both local and national, to encourage a survey of the issues impacting the Australian and New Zealand Library workforce, including ageing and the impact of younger generations on the profession. It is expected that such a survey would lead to the identification of national strategies and partnerships. UNISA should participate in these as well. (Recommendation 7.2)

Conclusion

The basics of a good workforce and succession plan are in place at the UniSA Library. Adding other components and preparing and committing to a formal plan that is communicated to staff and the university administration will ensure that, over the long term, UniSA will have the staff that it needs. The UniSA Library should continue to play a leading role within the university to demonstrate its best practices and to serve as pilot for new university initiatives in workforce planning.

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Workshop Managers

(July 2004)

The Vision: What We Would Like Our
Library Workforce to Look Like

Organizational Culture that Fosters....

- Aptitudes/Personality Types
- Risk Taker
- Entrepreneurs
- Extroverts
- Leaders/Innovators
- Flexible/Opportunistic
- How Staff Feel They are Treated by Organization:
 - Happy
 - Valued
 - Well-Trained
 - Understood
 - Listened to
- Attitude/Awareness
 - Learning for Life
 - Diversity of Attitude
 - Communicators
 - Flexibility
 - Ambitious
 - Optimists

TechnoVisionaries

Skill Sets

- Teaching
- Technology
- Interpersonal
- Management
 - Planning
 - Strategic
 - Leadership

Organizational Learning

- Cross Functional Teams
- Cross Functional Positions
- Multi-Skilled

More Diverse

- Gender (More Males)
- Age
- Indigenous/Multicultural
- Language
- More Women at Very Top

Organizational Relevance

- Academic Library Staff with Teaching Competencies and/or Higher Degrees
- Multi-Professionalizing within Library

Appendix A

Workshop Staff (July 2004)

The Vision: What We Would Like Our
Library Workforce to Look Like

Diverse and Flexible

- Enthusiastic
- Agile and Open to New Ideas
- Evolving
- Flexible/Adaptable (All Levels)
- Younger Staff

Advocate/Advocacy

- Strong Advocates
- Visible in the Wider Community

Inspired Leadership

- Approachable
- Happy
- "Can Do"/Fearless
- Good Listeners

Integrated

- Team Focused/Team Players (Industry/Employer)
- Team Based/Cross Functional
- Less Tribal
- Integration with Other University Services and Delivery Units
- Learning/Evolving
- Trainee Positions
- Leadership Development Programs
- Technical Savvy
- Socially and Technologically Aware

Appendix B

Appendix B

Obstacles to the Vision

Workshop Staff (July 2004)

