10 Success Factors for “Small Library” Directors
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JLAMS, the electronic Journal of the Leadership and Management Section of the New York Library Association, starts its tenth year and we are happy to introduce the Fall 2013-14 issue.

In this issue we have done something different. Because only one new article made it through the editing process we have reached back into the past and added what we consider to be five articles that stand the test of time and are still just as relevant as when they were written. Our new article by Jane Chirgwin goes through ten factors whose mastery are necessary for a successful small public library director. Articles from 2004 through 2010 deal with raising the student achievement level through library media services, developing an information literacy program, nurturing new leaders by leadership, using statistics for strategic success, and how to work together when budget cuts are imposed. Enjoy!

JLAMS provides a valuable outlet for the dissemination of ideas, articles, academic papers, and essays of interest to library leaders at all levels and of all types of libraries: academic, public, school and special libraries. As library leaders, we have a lot in common, but we have few places to share in detail what we know and what we learn. JLAMS was the first peer-reviewed journal in NYLA, and the original editorial board set a high standard for the publication and we are proud to maintain that standard. Readers of JLAMS are well-served by our team of referees, as are those whose contributions are published here. For the high quality and value of JLAMS to be continued your submissions are vitally important. For information on article submissions, editorial policy, a submission form and more, visit the JLAMS website page at http://www.nyla.org/displaycommon.cfm?an=1&subarticlenbr=318

JLAMS is made possible by your membership in NYLA and in LAMS. LAMS receives funding based upon the number of NYLA members who select LAMS as their primary NYLA section, as well as by those who pay an additional $7.00 to add LAMS as a secondary section. Please keep this in mind when renewing your NYLA membership. Also please take the time to encourage all of your colleagues and contacts in the profession to consider joining NYLA and LAMS. And thanks for your support!
10 Success Factors for Directors of Small Public Libraries

By Jane Chirgwin

Abstract: I never meant to be a manager, I just wanted to be a librarian. Unfortunately, I don’t have the accuracy and patience to work behind the scenes, and I outgrew being a part-time children’s librarian. Somehow I ended up becoming a Library Director, taking a disaster of a library into modern times with one, then two, library clerks. Now, we’re in a new building, I have four employees, and new directors are coming to me for advice. I keep figuratively looking behind me, thinking they must be asking someone else. The little I know has been garnered by trial and error. I had no guidance, no clear path. I made stuff up, copied what I’d seen in other places, experimented and made do. I will lay out what advice I would give to a freshly minted director of a small public library, and you can do with it what you will. I also recommend that you read the Handbook for New York Public Library Directors by Rebekkah Smith Aldrich. Here are my top 10 words of wisdom.

1. Don’t Micromanage

As someone who is in charge of everything from children’s programs to making sure that the furnace maintenance schedule is being followed, it is a good thing to delegate when you can. Give clear expectations and parameters, and then step back. Your employees need to be empowered to take initiative, not be sitting on their hands waiting for the next order. One of my mottos is “never hire someone you wouldn’t want to be stuck in an elevator with.” You want the person who would come up with a way to get out or call for help, not the one who would panic or regale you with cat stories. If you have a certain way you want something done, write out instructions and communicate them clearly. Otherwise, let your employees come up with their own methods.

In Todd Whitaker’s book, Shifting the Monkey, he talks about some managers’ tendencies to take on employee’s problems and responsibilities as their own. Every time you take something else on it is another monkey on your back. Don’t take other people’s monkeys. If you take over someone’s job and do it yourself, it starts a chain reaction. The employee is “demotivated”, you have heaped another duty onto your
roster, the library has become more fragile as an entity, and your employee did not gain any experience doing the task.

2. Set and meet standards

Whether your predecessor stuck around to show you the ropes or not (mine didn’t), don’t take their word for how things should be done. The NY State Education Department has a set of 11 minimum standards that public libraries need to meet—does your library meet them? Some of them need to be done by your trustees. Beyond the bare minimum, your library should meet the needs of your community and be run professionally and consistently. Policies should be enforced evenly.

There is no possible way that you can meet the expectations of your library patrons. They have gotten used to instant results, around the clock hours, abundant choices and little personal responsibility from the massive retail chains. Your library is not a big box store and you should not compare yourself to places with million dollar budgets, advertising agencies and a staff of hundreds. Having said that, you need to know what those expectations are so that you can have a clear message to your community about how you can best accommodate them (we don’t have everything, but we can inter-library loan).

3. Know where your money comes from

I often look back fondly at the blissful ignorance of being a children’s librarian. I got my book budget and I spent it, not worrying about where it came from. As the director, you need to know how your bills get paid. Who exactly approves your budget? You cannot assume that it will stay the same. Branch closures and staff cuts are on the table at library districts around the nation, Bob Warburton reports in the Library Journal. It is vital to connect with the decision makers, whether they are voters or politicians, and let them know what your library can do for them and your community. Provide them with annual reports, newsletters, pictures of cute kids, testimonials and newspaper articles. Your Library Trustees should be advocating for the library’s budget with everyone they meet in their community.

It’s important to have “Friends” with a capital “F”. The Friends of the Library are not only your advocates, but fund-raisers. They are who you can turn to when your budget is depleted but you need pizza for the teen program, someone to ask local businesses for donations, and charitable organization status for grant applications (if you are a municipal library). It is worth your time to get a Friends group off the ground or revitalize a defunct organization.

4. Connect with your peers

When you are in a one-librarian library, it can be hard to get out to meetings, conventions and workshops. Make the effort. You usually get more from a casual conversation with a peer than you ever could with any book, class or website. Even if her library is different than yours, she probably has encountered some of the same issues and might have innovative solutions. Also, a little bit of commiseration from a fellow librarian can keep you going through dark times.

Lynne Oliver echoes me in this in her advice to new directors: “Up until now, you may have avoided meetings, committees, and other "off" assignments like the plague. Get over it. Networking has its merits.”

5. Your most important staff person is maintenance

If you don’t have a janitor, you should close your building. It takes a while for this to sink in. You would like to think that it is your knowledge, your staff’s welcoming manner and your impressive collection that make the
biggest impression on the average library patron. No. If the bathroom smells, if the tables are sticky, that is all they will remember. Keep your facility clean, functional and uncluttered.

Aaron Schmidt from Library Journal advises looking for “pain points,” places and practices that limit the usability and appearance of the library. Every once in a while, walk around your building with fresh eyes, thinking like a patron, starting with the parking lot. What can you change to make your facility more desirable?

6. Your library is not an archive

The metaphor for a public library is that of a garden, not a treasure trove. Your collection should be constantly growing and changing. Unless you have the resources, send archival materials to repositories such as local historians, city clerks, museums or the State Library. Steel yourself and get rid of the things that are unwanted, unused or obsolete. Make the same approach to your files, your public information and your supply closet. This is easier said than done. The siren call of “I might need this someday” is almost irresistible. If so, take baby steps. Pull your weeding list and put it in the back room for a month. Box up the antique books that were donated and put them on a high shelf. Your immediate working space and public collection should consist of things that are needed, useful and in good condition.

I have found the CREW (Continuous Review, Evaluation, and Weeding) method manual very helpful in making decisions about discarding books. Jeannette Larson cautions in her introduction to the manual that “lack of funds to replace outdated or worn items is never an excuse for not weeding. Any extensive weeding will enhance the value of the collection…”

7. Get comfortable with computers

My library has become a computer lab in many ways. We provide internet access, basic computer training, and support for digital materials. Computers are 50% of my job. I need to maintain all the computers in the building, fortunately with the help of our library system’s excellent technical staff. I maintain our website, order books, create accounting spreadsheets, track statistics, promote through social media, make newsletters, track meeting rooms, create staff schedules, and correspond with everyone using my computer. As what is termed as a “digital immigrant” instead of a “digital native”, I need to be able to teach myself new things and be open to change. I am constantly learning. As a director I need to be on top of social media, e-books and cataloging systems. In order to provide reference service, I need to know Overdrive, Twitter, Facebook, Google Chrome, Microsoft Office, scanning documents, uploading documents, setting up e-mail, identifying scams and most importantly, how to explain all of that without descending into incomprehensible jargon or condescension.

The digital divide, between the haves and the have-nots, has become wider and wider. Teachers assume that their students have an internet connected computer with a printer at home. Employers require online applications for truck drivers and check-out clerks. The government asks the unemployed to fill out forms online and wants everyone to e-file their taxes. Meanwhile, we have people who don’t know how to use a mouse, highlight a word or navigate through a web page.

Leslie Patterson noted this difficulty in her American Libraries article “Some Experience Necessary”. The problem is not just a lack of computers or internet access; it is also a lack of knowledge. Patrons do not know how to write a resume, how to compose a business letter, how to find information or how to evaluate collected research.

Our staff has to set boundaries or they would be sitting next to someone at the public computer area all day. I teach classes once a month and set up one-on-one appointments when I can. We coordinate with other agencies, such as the Rensselaer County One-Stop, to get people the help they need, and provide one-on-one tutoring by
appointment. Other libraries have hired on teachers or trained volunteers to help with basic computer literacy. The ideal situation would be an on-staff tutor doing daily one-on-one appointments and weekly group classes, a goal we have not achieved yet.

8. Your job would be so much easier if not for all these patrons

Even though I should have seen it all already, I am frequently startled by patron behavior. It’s not just little kids running in the library. It’s parents who send their 7 year old child alone to pick up R-rated movies. People who claim that someone must have stolen their library card and checked out items without their knowledge. People who thrust books at my face while I am checking another patron out. There are people out there who will make you question your faith in humanity on a daily basis.

Gene Ambaum (Unshelved)\(^9\) gave a speech called “Surviving the Public” at the 2013 Book Expo America. Two things that he and Bill Barnes said really resonated with me. One was that policy is only a history of bad behavior: the reason why there is a rule against people dancing on the table is that someone did. Two is that at some point in our lives, we have been that “problem patron” ourselves.

When it all starts getting to me I take a break and remember the good patrons, the ones who feel horrible about owing a dime, who show appreciation for our services, who check out lots of books and encourage their children to do the same. There is great satisfaction in getting the right book or piece of information into the hands of the person asking for it.

That still doesn’t stop me from joking about keeping the door locked.

9. Keeping track helps you measure achievement and failure

When I first started out, I was not aware of the power of statistics. I just saw circulation numbers and attendance charts as some kind of propaganda from mathematicians. My first annual report was a wake-up call for my methods of tracking how the library is used. It is a good idea for a new director to look over what the state expects you to track. For instance, I need to track the number and attendance for English as a second language classes held in our building, even though it is a volunteer-run program.

Our library doesn’t have a door counter. So we take four weeks out of the year and do “statistics weeks” where we count how many people come in and how many reference questions are asked. Knowing our busiest days and times helps me determine how to set up staff scheduling and adjust our hours of operation.

Another excellent resource is a national survey such as the Pew Internet and American Life project\(^10\), which just came out with a report on younger American’s library habits and expectations. For example, knowing that 65% of adults ages 16-29 own a smartphone might prompt you to make your website and catalog more mobile-friendly.

10. Remember the big picture in your day to day work

“In all things you do as a director of the library think “community first” and you will rarely go wrong.” - Rebekkah Smith Aldrich, *Handbook for New Public Library Directors in New York State*.

When you are overwhelmed, it is easy to put your head down and just do daily tasks, putting out one fire after another without paying attention to the arsonist in your midst. Stop. Take the time to step back and look at the library as a whole. What is your mission? What results do you want to achieve? A library that prioritizes item retention will have a different tone, policies and strategies from a library that prioritizes fine income. Set goals for
yourself, for the trustees and with your staff. Schedule time in your busy schedule to work on long term projects like grant writing, collection evaluation and collaborative programs with other organizations.

I wish you luck in your new position. While it is scary being the boss of a library, the challenge made me develop strengths and grow as a person. I hope it will do the same for you. <>

Citations:


Texas State Library and Archives Commission


Using your Library Media Program to Establish Instructional Equity and Close Student Achievement Gaps

F. Georges

“a persistent, pervasive, and significant disparity in educational achievement and attainment among groups of students as determined by a standardized measure. When analyzed according to race and ethnicity achievement disparities negatively impact education outcomes for poor and children of color on a consistent basis.” A Student Achievement Gap, Pearson, 2001

In 1992, Jonathan Kozol’s investigative work, Savage Inequalities: Children in America’s Schools, revealed the stark economic disparities that exist in inner city schools vs. Their suburban counterpart schools. What was true then still exists now. Impoverished neighborhood schools continue to lag behind affluent neighborhood schools in per capita spending, extracurricular programs, recruiting qualified teachers, standardized test scores. Current research indicate that the gap is widening as poorer schools fall further behind in their ability to provide effective and direct educational services. Stopping short of completely revamping the property tax structure and redistributing wealth and influence to the students and families who are in greatest need, what actions and strategies can a school principal employ to help stem this tide, remedy an unfair system, and provide their school children the competent level of educational services that they are entitled?

Ensuring that your school maintains a quality library media program will positively impact student achievement. When used in combination with tested school reform strategies, i.e., smaller classes, smaller schools and quality teachers, instructional inequities and achievement gaps begin to dissipate.

In 1963, the Gaver Study was the first meaningful piece of research produced that investigated the effectiveness of the school library and its impact on student learning. However, thirty years later (1993) the famed “First Colorado Study”, produced by Keith C. Lance, et. al. launched a firestorm of new research studies that resulted in evidence-based school library practices as a positive feature in student achievement rates. The findings currently serve as a driving force of

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information literacy and the 21st century learner’s movement in schools, colleges and universities worldwide.

To view the list of all the pertinent research studies go to: http://www.davidvl.org/research.html. The findings are largely irrefutable. Students in schools with strong library service programs and quality school library media specialists achieve to a greater measure on standardized tests.

The findings stand the test across socioeconomic factors. The two governing organizations that continue to set the standards, guidelines and policies for effective school library service are the American Association of School Libraries (AASL) and the Association of College & Research Libraries (ACRL).

In recent years educators and researchers began to investigate the formal teaching and learning process in terms of K-16 instead of K-12. The standards and expectations of the college student and college instructor in terms of library service have uniquely trickled down to the K-12 learner. As elementary and secondary students work up the ladder to college academics, students are expected to be information literate and conduct research effectively.

As a result college professors and instructors are expected to integrate information literacy skills and assessments with their teaching practices. The result is that students entering college are often expected to have core information literacy skills. Knowledge of the rigorous A.C.R.L. Information Literacy standards by school and district administrators will invariably help them better prepare their students for their academic college experiences.

Finally, it is impossible to reveal the phrases “21st century learner” and “Information Literacy” without paying homage to the significant contributions of Mike Eisenberg & Bob Berkowitz. These two men innovatively approached problem-solving, critical thinking and information skills development by creating and then educating us about the effectiveness of the “Big 6 “ Information Problem-Solving Process (http://www.big6.com/). Their work serves as the philosophical baseline for all effective information literacy practices in school and academic libraries.

PROFESSIONAL TOOLS

The various professional tools for meaningfully reinventing your library media program through assessment, curriculum alignment and value-added library media services are available on the A.A.S.L. web page - http://ala.org/ala/aasl/aaslproftools/aaslprofessional.htm

In 1998, the NYS Education Department saw fit to address library funding and service gap concerns between urban/rural schools vs. their suburban counterparts. They convened the Regents Commission on Library Services to develop and recommend to the New York State Board of Regents a vision for library services in the 21st century and a plan for ensuring the greatest access to information for all New Yorkers.

Under the direction of the Board of Regents, the State Education Department’s Office of Elementary, Middle, Secondary and Continuing Education (E.M.S.C.) assumed direct responsibility for improving the quality of education programs and services statewide (NY). They also aggressively addressed the issue of library service deficits among urban and rural school districts. The E.M.S.C. developed a tool kit for school-based leaders to properly assess the status of their library programs and the corrective action required to meet minimum standards of service.
This tool kit includes curriculum integration practices, standards for effective teacher/librarian collaboration, creative fund-raising, library management practices, school library surveys, library legislation/advocacy, and information literacy standards for learning.

**The Tool Kit**

No Child Left Behind - Improving Literacy through School Libraries Grant Program

Two of the “crown jewels” of the tool kit are documents entitled, The Principal’s Manual For Your Library Media Program, published by the American Association of School Librarians and the The School Library Media Program Evaluation. The AASL created these documents as school leadership guidance devices for properly assessing and planning for your school library media program. Also in the tool kit is the No Child Left Behind - Improving Literacy through School Libraries Grant Program.

**The Principal’s Manual For Your Library Media Program.**

The highlights of the Principal’s Manual lay in its insistence that a school library that operates in an “optimal” learning environment must:

- Uphold a mission statement that puts into action the belief system that library media programs support and strengthen curriculum and bridges the digital divide.
- Build and maintain district administrative support.
- Ensure time-structured collaboration around teaching and learning practices within the school day, no less than once weekly.
- Participate in school wide curriculum design/maintenance.
- Establish a leadership role in professional development activities that focus on information literacy & technology instruction to students.
- The library media program is the learning hub of the school community.

The Principal’s Manual is an excellent starting point for effective goal sharing and vision development while meeting with your school library media specialist. The manual is most effective at the beginning of every school year. It sets a tone and expectation for students, faculty and of course your library media specialist. However, experienced and effective administrators revisit the manual periodically throughout the school year to retool and reassess their progress.

**School Library Media Program Evaluation**

“The School Library Media Program Evaluation” form is a rubric for reviewing and assessing school library media programs based upon a set of target indicators. There are 15 target indicators in total:

- Scheduling
- Collaborative Planning
- Collaborative Teaching & Learning
- Library Automation
- Technology for Instruction & Access
- Resource Sharing/Networking
Using your Library Media Program

- Budget
- Administrative Support
- Professional Development
- Library Media Program Advisory Committee

The rubric’s continuum stretches from a status/description of “exemplary” to “non-existent”. The intended use of the evaluation form goes beyond its apparent value as an assessment tool. Most importantly, it should serve as a data driven guide for school decision-makers in determining where they should be directing their resources.

In combination both documents thoroughly address the key aspects of school Librarianship. Further, their ability to provide the necessary tools to logistically and strategically provide the highest level of library services possible to all students without regard to socioeconomic status. Both documents are available in their entirety at the New York State Education Department’s Office of Elementary, Middle, Secondary and Continuing Education (E.M.S.C.) - website: http://www.emsc.nysed.gov/nyc/library.html.

N.C.L.B. - FUNDING STREAMS

Attempts to “close the gap” may force you to look beyond state and local support for your library media program. In January 2002, President George W. Bush signed into law the federal No Child Left Behind Act (N.C.L.B.). One of the resonating ideals of this educational reform program was that it believed that schools must place a special emphasis on instituting educational programs and practices that have been proven to be effective through rigorous scientific research. The groundbreaking research studies on school libraries, students and high academic achievement live up to this ideal of N.C.L.B. As a consequence, N.C.L.B has authorized a discretionary federal grant entitled, Improving Literacy through School Libraries Program. The program’s purpose is to: “improve student literacy skills and academic achievement by providing increased access to up-to-date library materials, a well-equipped, technologically advanced school library media center, and welltrained, professionally certified school library media specialists.” The grants are only awarded to local educational agencies with at least 20% of their students from families below the poverty line. School district family poverty rates are posted on the web at http://www.ed.gov/programs/lsl/eligibility.html. Individual schools are not eligible to apply for a grant. This is an excellent opportunity to build and maintain district administrative support for your library media program.

An uncomfortable number of school leaders do not believe that all children can learn at high levels regardless of their ethnicity, ability, gender, socioeconomic status, native language, or whether they have a disability. The unfortunate result is a failure to recognize achievement gaps in student learning and a deficit in fair and equitable educational services. If any student in any class in any local education agency is not performing according to their state’s standards and expectations, an achievement gap exists. It is incumbent upon school leaders to first recognize the problem and systematically reverse the wave of educational inequity and disparity. Given the necessary tools, a great place to start is with your library media program.
Notes


Information Literacy to Information Fluency: Using Strategic Agility to Affect Change

by Gail M. Staines, Ph.D.

Abstract: Information literacy in higher education has evolved over many decades to the point where librarians are at a crossroads. Teaching students how to search for, locate, and analyze information effectively can either ‘stay the course’ by using a wide variety of avenues to teach (such as “one shot” sessions, credit courses, individual instruction, online courses, etc.) and by imposing assessment and outcomes measures without changing the delivery methods used, or information literacy can move in a different direction by integrating such instruction into curricula through strategic planning. The goal in developing and implementing a plan for change is to reach the ideal instruction program where information literacy, computer literacy, and critical thinking skills intersect to create information fluency. This article applies the concept of strategic agility to the development of an action plan to effectuate change in information literacy programming.

Introduction
Over the past two decades, the author has designed, taught, and assessed information literacy (IL) programs at all levels of higher education – from community college to graduate level institutions. During this time, the author has analyzed several information literacy programs on campuses nationwide, has discussed information literacy with countless numbers of library directors, librarians, administrators, and faculty, as well as completing a dissertation on the topic. (1) Upon reflection of these site visits and conversations, the author has come away with one clear observation – librarians are attempting to impose outcomes assessment measures and various instruments on information literacy programs that have not essentially changed in years without holistically re-evaluating the program. Of course, the Internet and the availability of online resources have impacted library instruction. Libraries have also built classrooms with assistive

Dr. Gail M. Staines currently lives in the Greater St. Louis Area and is an External Funding Specialist, for Aspect, Inc.
information literacy, (e.g. computers, Internet connection, video display projectors, etc.) Librarians also face challenges from those who would prefer to continue the "traditional" program while re-creating a new and improved program. In addition, institutional politics, workload, budget and staffing issues, and lack of a campuswide mandate defining information literacy need to be faced. Some and/or all of these reasons (and others not here identified) may explain why information literacy programming itself has not changed. Finally, if the ultimate goal is to create a dynamic, flexible program to teach students the ins and outs of successful information searching and analysis, then the term "information literacy" may need to be shifted to the newer term "information fluency (IF)." “Information fluency may be envisioned as the optimal outcome when critical thinking skills are combined with information literacy and relevant computing skills,” according to the working definition as created by the Associated Colleges of the South. (2)

This article presents a model action plan that can be implemented in order to affect positive change in moving from a repetitive instructional program to a dynamic one that integrates information literacy goals, objectives, and assessment directly across the curriculum, with the inclusion of information technology components needed to fulfill the working definition of information fluency.

The Issue

This article sets aside the issue of whether or not librarians should teach information literacy - an issue that has come and gone over the past several decades. (3) It also does not delve into a conversation about the best methods for teaching students effectively, as the literature includes many practical approaches for effective teaching and learning. (4) As well, the conversation about how to best assess information literacy is not addressed. Readers should be aware that assessment of skills is currently the focus of many higher education accreditation agencies. The Association of College and Research Libraries (ACRL) and others provide practical methods on how to assess information literacy skills. Also, the Educational Testing Service (ETS) Information and Communication Technology (ICT) Assessment online program is a new tool in the area of information literacy assessment that readers may want to learn more about. (5) Readers interested in discourse over whether the ACRL definition of information literacy or the National Research Council's definition should be used can consult Rettig's and Hagen's "Stakeholders and Strategies in Information Fluency" article published in the inaugural issue of Transformations: Liberal Arts in the Digital Age. (6) What this article does do is to focus on how librarians, faced with teaching numerous library instruction sessions, can use action planning to move an information literacy program from being static to one that is progressive, dynamic, and effective - or strategically agile — in meeting current student needs.

If you are a librarian, faculty member, and/or administrator working in academe, you have certainly been exposed to questions about how best to teach students to search for, locate, and analyze information. (7) Information literacy continues to be a much talked about topic in the library and information science literature. A brief scan of journals posted on the Clearinghouse for Library Instruction web site shows 21 journals that either focus completely on information literacy or include articles on the topic in their publication. (8) A review of the literature, coupled with onsite campus visits, and discussions with higher education professional staff reveal an interesting shift that information literacy programs are just beginning to take. In this environment where assessment has become the focus on campuses nationwide, academic librarians continue to offer...
“one-shot” sessions (both general and subject-specific), tours, credit courses and individualized instruction. (9)

Not wanting to disappoint, librarians say “yes” to instructional sessions, even though the request for instruction comes the day before or even the morning of the request. In attempting to meet both the campus and accrediting agencies requirements for outcomes assessment, librarians apply ACRL standards for information literacy to each session. Frequently the result is a page-length or more list of goals, objectives, and outcomes for a single session. Somewhere, either before, during, or after (or some or all of the above), assessment in the form of pre- and post-testing, surveying, journaling, printouts of citations and so on needs to occur. Combine all of this with faculty insisting that there is not enough time in their course for information literacy instruction, and the demands of other job duties, such as providing reference, serving on committees, collection development (just to name a few), it is no wonder that librarians with the responsibility of instructional programs do not have the time or energy to step back and really review the current status of their programs including making necessary changes to meet the current needs of students.

Although librarians may feel stressed-out over the pressures and conflicts inherent in responding to the need for information literacy programs, they do not deny the importance of teaching students to be information literate. This movement not only continues within our profession, but is also being recognized outside the library world. Conversations between librarians, faculty, and administrators are occurring frequently on campuses across the United States, especially within curriculum committees and academic departments. (10) Accrediting agencies, such as Middle States and the Western Association of Schools and Colleges, now include information literacy requirements. (11) Individuals both within and outside of academe recognize the importance of graduating students that can locate and use quality information. The issue then, becomes one of how do librarians, as change agents, lead the drive to re-evaluate and re-vamp one of the – if not the – most important piece of higher education today?

**Strategic Agility**

The profession is now at a point where – given campus support – changes can be made to improve IL programs holistically. Not only is the environment on most campuses ripe for supporting this change, but contemporary models of strategic planning provide the necessary framework for this transition. One such model is known as “strategic agility,” where an institution’s success “has more to do with its ability to transform itself, continuously, than whether it has the right strategy. Being strategically agile enables organizations to transform their strategy depending on the changes in their environment.” (12) Herman and Gioia argue that the secret to success is “being quick on your feet, nimble, responsive, and always alert.”(13) In other words, being strategically agile. There are several steps to achieving strategic agility. According to Hughes and Beatty (14), these include assessing where we are, understanding who we are and where we want to go, learning how to get there by establishing a strategy that includes prioritization of goals and activities, making the journey by moving strategy into action, and implementing a process for checking on progress, also known as continuous assessment. This article focuses on developing a strategy through the creation of an action plan.
The Action Plan

Through the development of an information fluency action plan, reaching the goal of an ideal IF program can be moved further toward reality. Why is this step important? Basically, it provides footprints on which steps can be taken to move from a static instructional program – one that may not have been reviewed since it was established on campus — to a vibrant educational program with substance.

At first, creating such a plan may seem to be a daunting task. It has been this author’s experience that faced with the idea of dramatically changing a library instruction program, many professionals would rather stay within their comfort zone and simply add assessment measures to a program that really requires an overhaul. However, there is comfort to be found in knowing that others have recently gone before you and have worked through this process. For example, St. Olaf College Libraries has created “Information Literacy: An Action Plan” that includes a proposal for a coordinated information literacy program with stakeholders and needed resources. (15) In 2005, ACRL presented an online group seminar on this topic where participants shared strategic planning experiences with IL programs and indicated that working through this “process is actually easier than it appears because the Information Literacy Standards for Higher Education provide a highly flexible blueprint for strategic planning.” (16) The following is an information fluency action planning template that the author has successfully used in assisting individuals to work through this important process of change.

Action planning has been a buzz word in the corporate and nonprofit world for decades. The following template was developed for use by those desiring to change IL programs on their campuses. Content for the template was developed from the literature concerning planning in general and in more specific terms when applied to academic libraries. Lorenzen explains that Kaufman, Herman, and Watters have created a planning model that can be directly applied to information fluency planning. (17) The ACRL Institute for Information Literacy Best Practices Initiative that describes characteristics shared by quality information literacy programs was also used. (18) The components of the IF action planning template is as follows:

1. Name of the program and contact information: The information literacy program should be identifiable by one name that is known to all (e.g.: the Information Literacy program, IL program, Information Fluency Instruction, etc.). Referring to the program using multiple names (i.e.: BI, library instruction, etc.) will confuse those outside the library that may not be familiar with this instruction. “Branding” the program also lends it some sense of credibility and also allows for the possibility of the library developing a PR campaign around the name complete with a program logo. Also, one individual should be identified as the main contact person to answer questions about the plan itself.

2. List of planning committee members: Providing a list of planning committee members shows the diversity of the backgrounds and positions held by those involved in making change happen. In selecting committee members, care should be taken to include key individuals that represent stakeholders in the IF program (i.e.: faculty, librarians, academic dean, curriculum and assessment specialists, etc.). An invitation to those who might read the document to contact the person identified in order to answer questions or discuss possibilities for collaboration or participation in the planning process may be included in this section.
3. Executive Overview: This section briefly describes the importance of IF to the campus community, why the library is embarking on IF planning, and what is included in the planning document.

4. University mission and vision statement: The plan should directly reference and tie into the overall mission and vision of the university. Ideally, the IF plan should be folded into the institution's strategic plan.

5. Library mission and vision statement: These should be directly referenced as well.

6. Program mission and vision statement including core values: The IF program should have its own mission and vision statements. Florida International University provides an excellent example of a mission statement by stating, in part, “The purpose of the program is to assist members of the university community with developing information-seeking abilities appropriate for their individual levels of scholarship and to support their research.” (19) Reviewing the institutions core values and how the IF program meets these values is also an item for inclusion here.

7. Brief History of the Program: This section should include what individuals started the program, why it was created, the year it was established, and a list of program milestones. Background information in terms of statistics should be included (i.e.: number of librarians teaching, number of classes taught, number of faculty participating, etc.). This information can be further collated by division/department/course, semester, and year. Such information can be analyzed for trends over time and will be used in Section 9 (below) to assess the current environment.

8. Policy Statements: Policy statements for IF programs are critical when librarians are faced with questions concerning scheduling requirements, presence of faculty during instruction, etc. One institution the author worked with required the faculty to be present during the library instruction session. This policy, endorsed by faculty senate and academic council, stopped the habit of faculty who were neither present nor even on campus when library instruction for their class was occurring.

9. Assessing the Current Environment: Gathering and analyzing data on the environs in which planning and programming is taking place is probably the key to charting the course of action to be taken. A description of activities such as the results of a SWOT analysis (identified strengths, weaknesses, opportunities, and threats to the program); an environmental scan that indicates the lay of the land outside of IF (i.e.: what are faculty and administrative groups doing/not doing about this issue) – both on campus and within the broader community; results of surveys, focus groups, database searching analysis, etc.

10. Actions Completed to Date: In working toward and through the planning process, including brief information on what activities have taken place to date not only educates others on the amount of work that has been completed, but also gives those intimately involved in the process a sense of accomplishment. Information included in this section may include such items as: gave the information literacy assessment tool to 200 freshman seminar students (Fall 2004) and will give the same assessment to 150 more students in the Spring 2005; librarians completed seminar on
assessment; technical services librarian analyzes database usage in comparison to library instruction dates and assignments for any fluctuations.

Table 1 provides a sample Actions and Outcomes chart.

<table>
<thead>
<tr>
<th>Goal Statement(s)</th>
<th>Activities</th>
<th>Intended Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Psychology Dept:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Goal 1: To integrate Information fluency instruction into the undergraduate Psychology Curriculum.</td>
<td>Year 1: Activity 1: Library director and Information Literacy Coordinator meet with Psychology Dept. at department meeting to discuss integrating IF into the undergraduate curriculum. Specific psychology faculty agree to work with library staff to achieve Goal 1. Activity 2: Faculty and library staff meet to review what psychology courses include an IL component. Activity 3:....</td>
<td>Undergraduate students majoring in psychology will demonstrate all IF requirements by graduation.</td>
</tr>
<tr>
<td>Objective 1: Information Fluency instruction will be 100% integrated into the undergraduate psychology curriculum by X date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11.) Actions and Outcomes: This portion of the action plan will be the most used and revised section of all those developed. Easily written in chart form, three columns can provide easy access to the core information of the plan. Column one includes goal statements and accompanying objectives. Goals should be measurable. The second column lists specific activities tied to the indicated goal(s), with each activity completed by pre-determined dates. Continuous assessment needs to be one of the goals listed as it is the primary function of morphing into a strategically agile institution in order to have the ability to review program successes and challenges and make changes as needed on a regular basis. The third column briefly describes the intended results for each goal.

12.) Supporting documentation: Supporting documentation such as a list of committees (within and outside of the library) with an interest and/or specific goal with regards to information literacy; reference to key publications (other institutional publications such as a campus and/or library strategic plan, curriculum plans, “ACRL Information Literacy Competency Standards for Higher Education,” sections of accreditation guidelines relevant to information literacy, etc.) will enable the reader to refer to important pieces of information that the planning group used in developing the
action plan A planning document such as this may include most, some, or all of the components listed above. Whatever sections are included, it is important that the planning process is documented. Planning documents are infrequently static and more often than not are fluid publications. Care needs to be taken to update the document frequently so as to update the campus community of the action steps that were completed and steps that may have been revised, added, or deleted. Providing this information on the library's web site in a prominent location gives everyone easy access to the progress made to date. Posting an executive overview that briefly describes the current state of the planning process with reference to the complete document on the web is an effective PR tool as the overview can be printed and distributed at meetings campus-wide as well as posted on listservs.

Conclusion

The purpose of this article was to provide librarians and library administrators with a framework that can be used, effectively, to move information literacy programs from static to dynamic information fluency programming. How librarians, as change agents, lead the drive to re-evaluate and re-vamp their instructional programs is defined as the overall issue to be addressed by this process. Using the concept of strategic agility is presented as one method to use in order to move a program into one that is malleable and can meet the changing needs of students, continuously, over time. Developing an action plan is one piece of the larger process of making change happen.

It is recognized that an action plan provides one with a blueprint to which the process of implementing innovative information fluency programming can be charted and itself tracked. However, an action plan developed in isolation (i.e.: within the library), will not bring about change as several other activities are integral to effectuating change. Understanding institutional politics and how to work within it, having a campus-wide mandate that defines what information fluency is, knowing who the stakeholders are and obtaining their full support are key pieces that need to be in place in addition to a plan for action. Moreover, a decision needs to be made concerning whether the information literacy program currently in place will continue simultaneously while planning for a new program occurs. Many times this decision is based on the concerns of how students will be affected by having no or less information literacy instruction as well as lack of funds to hire additional librarians to teach while the coordinator of library instruction and other librarians work on developing the action plan. (20)

Libraries are in the midst of continuing changes on all fronts. Almost immediate use of new technologies (e.g.: iPods) by students, the latest education theme (i.e.: focus on continuous outcomes assessment), and the perennial crop of a new generation of students are constants. These and other unknown factors will perpetually impact library resources, services, and programs one way or another. Re-inventing information literacy instruction so that it shifts to integrating all three components of information fluency (i.e.: information literacy, computer literacy, and critical thinking) into key areas of curricula by utilizing action planning will lead to a program that can easily respond as academic needs arise thereby achieving a level of strategic agility.
NOTES


7. The American Library Association defines information literacy as: “To be information literate, a person must be able to recognize when information is needed and have the ability to locate, evaluate and use effectively the needed information”(1989, p. 1) American Library Association Presidential Committee on Information Literacy, Final report (Chicago, IL: ALA, 1989). ERIC, ED 315 028.


Information Literacy to Information Fluency


Abstract: Library leaders face the responsibility of nurturing a new generation of librarians and thus engaging in succession planning both for their own institutions and for the profession as a whole. This article discusses both what current managers can do to help create future leaders and what the next generation of librarian leaders and managers will need to know, drawing on the current literature and on the results of two surveys conducted for the author’s recent book The Accidental Library Manager (ITI, 2005). It is adapted from a talk given at the LAMS Luncheon at the 2004 NYLA annual conference.

There has been much discussion lately about the graying of the library profession, with authors predicting a huge future shortage of librarians, and newer librarians pointing out the difficulty in getting entry-level jobs. Demographics support these hypotheses. 25% of today’s librarians will be turning 65 by 2009 and 58% by 2019. Of course many of the positions vacated will be upper-level.

Even if the average retirement ages increases, we face a pressing need for younger librarians to develop the management skills needed to move into upper-level positions. In my own library, for example, the need for succession planning hit home last year. Our director of seventeen years suddenly announced his departure for a larger library. Our assistant director, in his late 60s, declined to take over — saying it was as good a time as any to announce that he planned to retire within the next three months. Our head of technical services, in her mid-50s, declined, saying it was too late in her career to be a director now, and she would miss cataloging. The board asked me, but I have a toddler at home and did not want the responsibility. Our board ended up making our non-MLS business manager the new director due to concerns about hiring an unknown quantity from the outside.

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The fact is that succession planning and nurturing new leaders is important and that it will take time to help future managers build the skills they need to be effective leaders in the 21st-Century.

This article aims to answer two questions:

First: Why do Generation X and Generation Y librarians tend to have a negative picture of library management? I have found this to be evident in discussions on e-mail lists and at conferences. From these interactions, it becomes apparent that many younger librarians are both dissatisfied with their own managers and uninterested in becoming managers themselves. You can experience this yourself by subscribing to a list such as newlib-l (http://www.lahacal.org/newlib/) or nexgenlib-l http://lists.topica.com/lists/nexgenlib-l/).

Secondly: Given this reluctance, how do managers prepare younger librarians for management and leadership? How do we change their image of management and help them to progressively take on more responsibility? How can they build the skills they need, and how can institutions benefit from their new ideas and projects?

The following sections cover:

- Moving beyond generational issues in recognizing that good management benefits all staff, while realizing that younger and newer librarians are key in succession planning
- Focusing on communication and collaboration, including the need to extend our belief in open access to information to library staff as well as patrons
- Overcoming librarians’ negative view of management and managers
- Working from professional commonalities to find connections
- Being the boss you yourself would want, emphasizing openness, participation, and encouraging others to grow as leaders.
- Preparing new managers for their positions

The emphasis throughout is that good managers create good staff by preparing them to take on challenges and leadership opportunities. Communication and collaboration on all levels are essential; staff members with opportunities to participate in decision-making and contribute to the success of their institutions are staff members who are engaged and productive.

Beyond Generational Issues

Nurturing potential leaders and planning for the future is not merely a generational issue. Creating an environment where all can succeed benefits staff of all ages and levels; we should never focus entirely on one generation or group at the expense of others. That being said, younger librarians are particularly important in terms of succession planning and retention. They have more options now than were open to many of their predecessors, and will be the ones called upon to lead our institutions in the next ten, twenty, thirty years. Younger librarians do of course have a mutual responsibility to build their own skills and a foundation of respect with all their colleagues, as well as to learn from their accumulated institutional wisdom. This article, however, focuses on the ways current management can prepare staff for leadership positions.
So, in light of the need for succession planning, how do we manage and mentor the next generation of librarians? First, we need to take the time to identify potential at multiple levels and to build on that potential. Sometimes it may be difficult to recognize potential. In such cases we must have faith in our staff and spend time getting to know them in terms of their potential. Many times it is opportunities that bring out the potential for leadership.

In addition to building on the leadership potential of current staff, succession planning should also be a factor in hiring decisions. Aptitude and experience in lower level job titles is important but so are personal qualities such as energy, enthusiasm, and the ability to adapt to change and help propel organizations forward. Think about what new hires can offer organizations; take the chance to revisit job descriptions in terms of changing institutions, patron demographics, and services. Think about new hires’ potential beyond a specific job; ask applicants about their interest in taking on leadership positions.

When looking for potential leaders, it is interesting to look at what others see as necessary for upcoming leaders. The May 2004 issue of American Libraries, for example, contained an article on “What Will Gen Next Need To Lead?” (2) which reported on a study gathering the views of upper management at larger academic and public institutions, discussing qualities needed by next generation of library managers and leaders. The article created quite a bit of consternation: while top-ranked personal qualities included such commonalities as credibility, evenhandedness, and self-confidence, these managers’ bottom-ranked personal qualities included a sense of humor, good interpersonal skills, and a commitment to explaining decisions. This caused an outcry on a number of e-mail discussion lists, and the August issue (3) included a number of letters from Generation X librarians objecting to the tone of the article, asking why the authors failed to talk to tomorrow’s leaders, and pointing out reasons why Generation X might be reluctant to lead. September’s issue included a “conference call” article titled “Gen X Bites Back,” (4) interviewing one of the study’s authors and a Generation X librarian. The study’s author said not to blame the messenger; they just reported on the managers’ priorities.

The Generation X librarian had some interesting responses. He mentioned the lack of commitment to explaining decisions, and said: “...that’s a major morale killer; that’s what I hear over and over again on Listservs [sic].” He reiterated the need for communication and openness and talked about how a management team that fostered this type of environment — between all generations and all levels — had led to increased circulation, increased materials budgets, and increased faculty support in his own institution. Communication and collaboration throughout the institution are a basic expectation in a successful library workplace that provides the foundation for building future leaders.

**Communication and Collaboration**

I spent 2004 writing a book entitled, “The Accidental Library Manager” (5). For the book I conducted two surveys; one of library managers, which had over 240 respondents, and one of library staff, which garnered over 340 responses. (6) The surveys were posted on-line at my library careers web site, Lisjobs.com, and advertised on a number of e-mail discussion lists (ranging from libadmin to nexgenlib-) and in the Info Career Trends electronic newsletter. Survey responses illuminated the way in which people would like to be managed and form a fascinating contrast to the American Libraries article.

Survey respondents expressed concern that their managers too often fail to extend the same courtesy to their staff as they do to patrons. They stressed that this was especially true regarding younger staff, paraprofessionals, and those outside of official leadership positions.

Newer and younger librarians expressed an expectation of openness and collaborative decision-making. When asked about the qualities of their own best managers, for example, respondents said
things like: “The best manager that I worked for allowed for open communication, even of difficult issues. She was open and honest and made herself available to employees to discuss whatever might come up in the workplace.” Another said: “She always kept the staff and on-call staff ‘in the loop,’ as well as always listening to our ideas and concerns, taking us seriously. I also really liked how she explained her reasoning for various policies; it is easier to explain to patrons when you understand.”

The idea of open communication and collaboration on all levels came up again and again. Library staff were positively glowing in their praise of managers who both listened to their ideas and took the time to collect input on and explain the reasoning behind their policies and decisions. Staff in such environments were happier, more engaged in their work, more supportive of institutional initiatives, and felt that they did better work than those in more closed environments.

A Negative Image: Management and Managers

Our next question is: why do we find that many librarians do not want to be managers? One of the American Libraries letters noted that Generation X librarians love the profession, but “there is no amount of money or prestige that would entice us to sacrifice our families, our home lives, and our sanity for the long hours and Sisyphean ordeal of a directorship... It’s not that we are reluctant to assume leadership roles, it is just that no one has shown us a good enough reason why we should.” (7) If this is the newer librarians’ picture of management, it is no wonder that few see a reason to move up.

During an October 2004 discussion on NMRT-L (ALA’s New Members Round Table discussion list) (8) on how to lead from nonmanagement positions, a surprising number of participants were also very firm in their decision never to go into management — and quite vocal as to why. They described a picture of management that some long-term managers might sympathize with, involving images of endless meetings, becoming embroiled in both internal and external politics, and spending all their time on administrative duties rather than frontline tasks.

An important way that people judge situations is by example and as many people seem to have gotten poor images, we need to think about what kind of image of management we are projecting, and how can we change past images. Library staffs, especially younger librarians, welcome an example of balance in their managers’ work lives, admiring those remain connected to the public service aspects of librarianship. Staff members in the survey I conducted were very complimentary towards managers who spent regular time on the front lines. They thought it made them both better managers and better librarians, and a picture of the type of managers they’d like to be themselves. They said things like:

“Too many administrators (directors, assistant directors, and others on that level) have forgotten what it’s like to serve the public... Whenever possible, administrators should work at a public service point during the busiest time of day to get a feeling for what their staff actually does. This is particularly true when an administrator is hired from outside the system; the best way for them to understand the staff culture is to participate in it.”

The survey suggests that when staff members do not see managers providing public service, they begin to question how grounded those managers can be in what is really going on in their libraries. Spending as little as a couple of hours a week on the reference desk can help a manager connect with staff and provide an example of someone who understands the issues they face.

Library managers also need to pay attention to the institutional environment as a whole. A September 2004 Chronicle of Higher Education column (9) for example, began detailing the job search of an anonymous academic librarian in an “emotionally unhealthy” library, a phrase which she picked up
from an earlier article on LISCareer.com. In that first article, characteristics of an unhealthy library included: lack of respect for the staff by the library administration; lack of clear direction from library administration; passive library administration that seeks no conflict or resolution to unhealthy situations where complaints are ignored or used against the staff member who complains; and, invisible administration. Most libraries do not suffer from all of these problems, however, problems in communication and staff misperceptions of what management does creep in all too easily.

Looking at the above list of unhealthy workplace concerns shows us that many of these issues come from the top down, meaning that managers have the ability to alleviate them. Also because younger librarians tend to be more loyal to people than to institutions, managers have the extra challenge of gaining that loyalty. Job satisfaction and work/life balance have been shown to be highly important to younger generations, who are more willing to switch fields or to move on.

Professional Commonalities, Common Professional Needs

People do not often choose librarianship just for the money. Instead, many pick this field for the chance to make a difference, work in a service profession, or meet people’s information needs. An August 15, 2004 Library Journal article on “Fixing the First Job,” which surveyed a number of newer library professionals, noted: “The reasons the new librarians decided to enter the profession are the same as those of the generations that went before...[Although] the tools of our profession have changed, the reasons we have for becoming librarians are the same... We new librarians like to help people, and we do it well.” By identifying and communicating such professional commonalities we can create a work environment that’s balanced and healthy for all. By reflecting these commonalities we can also create an image of management that is more attractive to library staffs.

Other ways mentioned in the LISCareer.com article that managers can make their environment attractive to staff include:

visible respect for all staff at all levels, a decision making process that is open and shared and grounded in fairness, showing management commitment to mission, creating a vision that is shared throughout the organization, and providing ongoing training for all levels of library staff. It comes to making openness and collaboration a priority. OCLC’s 2003 Environmental Scan, reporting on current trends affecting libraries, identifies collaboration as a priority for the future health of our institutions. Developing internal collaboration forms a solid base for developing cooperation with other institutions.

Being the Boss You Would Want

This emphasis on openness, cooperation, and participation harks back to the contrast between McGregor’s Theory X and Theory Y. Theory X typifies the authoritarian, or “tough,” management style, in which employees are assumed to dislike work and thus have a tendency to avoid it if possible. Theory X managers believe that employees need extensive direction, avoid responsibility, lack ambition, value security above all else, and must sometimes be threatened with punishment in order that they work toward organizational objectives. Theory Y exemplifies the participative management style, and posits that people who feel a commitment to an organization and are satisfied in their jobs will work in a self-directed manner toward organizational objectives without extensive direction or the threat of punishment. Theory Y says that the creativity and intellectual ability of most employees are underutilized and can benefit the organization when allowed to flourish. If employees are treated as responsible and valuable, then they will in turn act as responsible and valuable members of the organization.
John Lubans Jr. outlines a fascinating experiment he does in management workshops, where he tests participants both on how they see themselves as managers and how they would themselves wish to be managed. Although managers rank themselves as supervisors anywhere from extreme Theory X to extreme Theory Y, most shift to the Theory Y side of the room when it comes to how they would themselves like to be supervised. As he notes: “Those with a strong theory X inclination in supervising others find themselves wondering, ‘Why am I the boss that I would not want?’” (14).

Respondents to the staff survey were very clear about the type of boss they did not want. Out of 343 respondents, twenty-five percent (87) mentioned some variation of the term “micromanagement” when discussing either their own worst managers or the qualities managers should avoid. A number of additional respondents also mentioned the need to avoid micro-managerial type tendencies, without using the word itself. Those concerned about their micro-managerial bosses said things like: “They tend to make OTHERS wrong, rather than attempt to understand and value people who do not act or see things the way they do. They rule by intimidation, micro-managing, encouraging conformity and lack of assertiveness, ‘do what I say—not what I do,’ etc.” Another said: “He wanted to do it all his way, so it would be the ‘right’ way, and get all the credit. He hardly ever delegated. He was a micro-manager. He squashed people’s ideas until nobody wanted to risk taking any initiative.”

Many potential future leaders burn out early or avoid management because of their own previous bad experiences. This leads to the need for managers to take the time to mentor newer and younger members of their staff. Respondents to the manager’s survey found this process mutually beneficial. Mentoring helps bring in a fresh viewpoint and way of thinking, and discussions with newer librarians helped managers clarify their own thoughts and positions. Allow those you mentor and manage to challenge you by asking “why” — and take the time to come up with thoughtful answers. Mentoring also makes managers aware that they serve as role models, and more thoughtful about their own actions. They can think back to their first months as a manager, and how unprepared they may have felt by library school or previous experiences. Managers can convey what they wish they had known to those they mentor, helping them learn by example.

Secondly, institutions need to encourage professional development opportunities, both on a local/system level and in general. Encourage talented staff to attend leadership institutes as well as professional workshops and conferences; urge them to seek out opportunities. The more energetic and talented a library’s staff, and the younger a library’s staff, the more that professional development opportunities are essential to them, to their job satisfaction, and to their continuing development.

Affording opportunity also helps libraries retain staff as well as to grow leaders. This is essential especially for institutions with lower rates of pay. Managers should never see professional development as an easy place to cut. On approach that has potential is to assign finding funding for management skillbuilding projects to upcoming leaders. This can teach problemsolving skills and professional development at the same time.

Another way to build skills is to involve staff in projects that make them stretch their abilities. Library managers must encourage initiative and listen to ideas from all levels, pushing younger and newer professionals to take leadership roles even without a formal title, helping them develop the skills they need to move up and helping keep them challenged and engaged in the organization. There are mutual benefits to the library and its staff. Younger librarians often spend time and energy pushing their ideas over the initial objections of their managers, who think that new programs will fail or do not want to consider ideas from non-management staff. Library managers everywhere lose innovations from younger and newer staff members who are less persistent, or who are stymied by their own supervisors so that their ideas never filter up. Effective managers harness that energy and allow
younger staff to help energize all staff. They give people responsibility for projects and let them run with them, resisting the temptation to intervene and push the way you would proceed. They see what people come up with on their own, and are available with advice or support if needed. Younger librarians, especially, want to be challenged in their work, and often when given opportunities will run with them.

**Supporting New Managers**

New managers, especially younger managers, tend to encounter difficulties when moving into management positions. Most had little management course work in library school, and their experiences as librarians often failed to prepare them adequately for management. Those who become managers while younger often find particular problems managing older staff. The generation gap works both ways — just as Baby Boomer and older librarians sometimes find it difficult to understand, work with, and manage younger staff, younger managers can find it difficult to connect with, motivate, and manage older staff. Younger respondents to the survey for library managers mentioned difficulties in getting older or longtime staff to take them seriously, difficulties in getting them to listen to their ideas, and lingering resentment that they were passed over after paying their dues. Younger managers had comments like:

“I was the youngest person on the staff and I didn’t know how to confront my older colleagues who had more work experience than I did.” Another said “I was fairly young when I became a library manager, and often felt as though my older colleagues discounted my opinions and input.”

These younger managers were unprepared by their previous positions. Those who were not offered leadership opportunities in a supportive environment failed to develop needed skills. If they had not previously worked with older staff, it was sometimes difficult to see the necessity of their expertise, knowledge, and skills. They may also fail to involve longtime staff in solving problems.

On the other hand, if older staff have not had the opportunity to see younger or newer librarians in charge of projects and in other leadership positions before becoming managers, they may not have faith in the management skills of younger librarians. Managers need to encourage their staff to work together at all levels, emphasizing what different groups bring to table.

Some younger managers also expressed dismay that they did not have examples of good management or healthy work environments to build on. An openness to change and new ideas and the willingness to listen to all points of view is necessary to keep and engage the leaders of the future. Healthy and open organizations are able to satisfy staff, engage a new generation of librarians, and serve a new generation of patrons.

One respondent to the survey for managers put it this way: “...trying to prepare someone for management is like trying to prepare someone for having a baby — honesty inspires terror while the good parts are very hard to explain.” Like having a baby, being a manager is something people truly learn by doing rather than by explanation — but, like raising a child, successful management is something learned from multiple examples and experiences. Today’s managers need to think about what they are showing their staff, being the manager, and perhaps most importantly, creating the environment they want them to emulate.
NOTES


6. The text of and statistics from these two surveys can be found in Appendix A of Rachel Singer Gordon, The Accidental Library Manager (Medford, NJ: ITI, 2005): 333-337.


8. For more information or to subscribe, see http://www.ala.org/nmrt/.


Value by the Numbers:
Using Performance Metrics in Libraries

By
Debbi Olley Murphy and James A. Keller

Abstract: This article emphasizes the importance of using performance metrics in libraries. It argues that metrics can help libraries make a strong case for additional funding and prove their relevance, particularly during challenging economic environments. Additionally, performance metrics are a key part of strategizing and planning for libraries’ futures. The article also points out that, in addition to internal performance metrics, libraries should use industry metrics that are easily obtainable from other sources. Industry metrics give libraries an opportunity to compare their efforts to other libraries. The article concludes that performance metrics should be used regularly in libraries; numbers are measurable and far more difficult to dispute than anecdotal evidence.

Introduction

Recently, the news has not been good for libraries. The Great Recession has forced some libraries to close locations outright, and has forced others to dramatically reduce hours and staff. Traditionally, library administrators have been content to sit back and let the value of the public library speak for itself. Libraries were believed to be assets to the community, and users were assumed to know what they had to offer and how to take advantage of their services.

More recently, however, library administrators have been forced to acknowledge that they must increase awareness, among both users and budget-conscious elected officials, of their unique value to their communities. The economic crisis has forced all of us in libraries to think much more carefully about how we prove the relevance of our institutions. Performance metrics are an essential tool for proving that relevance to funders, grantors and customers. Additionally, performance metrics help to measure our successes.

To sum up, there are three particular areas where performance metrics can help the most: 1) they can help you build a stronger case for funding; 2) they can help you better judge whether your strategies are working; and 3) they can help
you make better future decisions. Because performance metrics are quantifiable, they are harder to dispute than anecdotal information.

**Gathering Performance Metrics**

The most basic question for public libraries that want to use performance is: how do I start? The answer is with your ILS system. Every system can run internal reports on user statistics, collection, visitor count, circulation, and more; the trick is learning to choose the most relevant and useful. Once you know which reports you want, you can customize your approach. With the help of your IT staff or vendor, you can run daily, weekly, monthly and annual reports on the performance metrics of your choice. Table 1 below illustrates our standard performance metrics, which we run on a monthly basis. We also compare metrics with the previous year.

**Table 1: Performance Metrics for Queens Library**

<table>
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<tr>
<th>Category</th>
<th>Y-T-D’0X</th>
<th>Y-T-D’0X</th>
<th>+/- (percentage)</th>
</tr>
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<tbody>
<tr>
<td>Circulation</td>
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<tr>
<td>Community</td>
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<td>*CLS Big 3</td>
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<td>*CLS 2nd 5</td>
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<tr>
<td>Multi. Circ %</td>
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<td>Chinese</td>
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<td>E-Materials</td>
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<td>Unique Customers</td>
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<td>Circ per UC</td>
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<td>Items per Capita</td>
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<tr>
<td>Items per Cardholder</td>
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<td>Reference Requests</td>
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<td>On Site</td>
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<tr>
<td>Virtual Ref</td>
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<td>Avg Per Session</td>
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<tr>
<td>Visitor Count</td>
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<td>Gate</td>
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<tr>
<td>Internet</td>
<td></td>
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</tr>
<tr>
<td>Card Holders</td>
<td></td>
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</tr>
<tr>
<td>New</td>
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<td></td>
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<tr>
<td>Total</td>
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<tr>
<td>Total</td>
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<tr>
<td>*Community Libraries</td>
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</table>
Using Basic Performance Metrics

For libraries, there are a few key metrics that are worth examining carefully; once particular numbers are gathered, they can be used to achieve the goals of making better strategic decisions and building a strong case for funding. As mentioned previously, performance metrics can also help determine whether your chosen strategy is working. Ultimately, performance metrics can help you plan and strategize into the future.

The first key metric involves Circulation. Which materials are circulating the most? Where are these materials circulating? Which materials are languishing on the shelves? Once these questions are answered, better decisions can be made. At Queens Library, we use performance metrics to drill down to the following circulation details: item type (CD, book, DVD), language (our collection includes materials in more than 50 languages), circulation per capita, and circulation per unique visitor.

Here is an example of how performance metrics can help library administrators make better decisions. At Queens Library, we had enjoyed a long history of circulation growth, but our performance metrics indicated that there was a significant decline in Chinese multisets. When we drilled down deeper, we learned the decline was system-wide, and not limited to a particular location or neighborhood. At the time, circulation of our Chinese materials accounted for about 20 percent of our overall circulation, so this indicated a significant problem.

Through additional study, we learned that the decline was the result of a couple of factors. The first reason was technology. Whereas at one time, a television series or soap opera might use five or six videocassettes (accounting for six individual circulation counts), now that same soap opera might be contained on just three DVDs, or even one, dropping our circulation significantly. The second reason was changing business practices in China. For a long time, public libraries in Queens were the only locations where people could find these multisets. But with a more open marketplace in China, leading to a wider availability of products, customers could pick up Chinese multisets at stores throughout the borough. Queens Library was no longer the only provider.

In this particular situation, using performance metrics helped to identify this situation and its causes, although it suggested no solutions. After we discovered what was happening with the multisets, we tried to see if we could expand our collection to provide materials that weren’t easily available in stores throughout Queens. When we discovered that that wasn’t the case, and also knew that improved technology would reduce our item counts, we were able to plan for a gradual decrease of Chinese multisets in our development and acquisitions planning.

At the same time, through a combination of using metrics and studying demographic information, we also became aware that more and more immigrants were coming to Queens from Pakistan, Afghanistan, and the Indian subcontinent. Accordingly, we were able to expand our collection to materials in those particular languages (Bengali, Urdu, etc.) and better serve populations that were growing. Thus, with careful analysis, we were able to judge whether our strategy was working, and we were also able to plan better.

Using performance metrics helps us to plan our collection more efficiently. We have also begun to use a vendor, collectionHQ™, to aid in our collection development and acquisitions. Using this tool, we are able to target our audiences at a community library level.

CollectionHQ™ extracts our circulation data, and allows us to run specific reports that we cannot get from our own ILS system. We can see what hasn’t circulated in each of our 62 libraries on a monthly basis, and are able to weed the collection accordingly. With collectionHQ, we can also clean up our own catalog, no longer showing that, for instance, Queens Library at Hillcrest owns a book that is actually not on the shelf.

1 See http://www.collectionhq.com/collectionhq.html for further information.
With collectionHQ, we can also run reports by genre (e.g. fiction), and learn what percentage of each library’s fiction collection has not circulated. We also are able to rank by author, which helps us define which authors circulate best in which communities. Using collectionHQ, we will soon be able to determine which libraries could better circulate titles from other libraries, enabling us to then “swap” materials between locations. This will serve to increase circulation in libraries. Thus, using hard numbers, rather than anecdotal data, we will be able to build better collections in our libraries.

The second key metric for public libraries is **Visitor Count** (also known as gate count). At its simplest, this metric tracks the total number of people who come to Queens Library daily both in person and virtually. Utilizing performance metrics, we have been able to discover, for instance, that our “virtual” visitor count has increased by more than 50 percent since last year. Because we analyze both the number of physical visitors and the number of visitors to our website, we’ve learned that over one-third of all visitors to Queens Library are now virtual visitors. Armed with this information, we can better tailor what we offer to our customers. For instance, we have recently begun an “e-initiative”; because so many of our customers use our website, we are striving to provide increased choices of digital media for them. And, through our Text-A-Librarian service, we are serving customers who are used to getting their information from their smartphones.

We have been able to use Visitor Count in another way. When we analyze these metrics, and discover declines in physical gate count, we have worked to figure out an explanation. Has that library been undergoing extensive renovation? Have there been weather problems? If we learn that, in fact, those issues are not present, we delve deeper, and do an in-depth analysis of the library itself. We try to find out more about what customer service is like at that particular location, or whether there has been a change in management. When we begin with Visitor Count as our metric, and drill down from there, we can work to discover what the particular issue is, and try to solve it.

The third key metric we analyze at Queens Library is **Program Sessions and Attendance**. In this category, we study the number of sessions we offer, the total attendance, and average attendance per session. While it may be tempting to simply look at this at face value, gathering only totals, we have found that careful analysis of this metric can yield important data for us. For example, it can tell us which types of programs are most popular. We can also find out if we are promoting the programs that customers enjoy the most or spending too much time offering programs that don’t matter as much to our customers while neglecting programs they really want. Thus we can judge whether our current strategies are working and strategize for the future.

A fourth metric that can help us focus is details about **New Cardholders**. We can not only track how many new customers apply for a Queens Library card each month, we can also use this metric to help us focus on strategy. Specifically, we can drill down to discover which neighborhoods are bringing in more people. Because we have 62 libraries across many Queens neighborhoods, it makes the most sense for us to study new cardholders by individual library. But for other public libraries, it might make sense to look at particular zip codes or neighborhoods. Where should library staff plan to hold card registration drives? Different libraries will find different ways to reach out to specific populations to engage customers in libraries where use is less or build in libraries where usage is greater.

**Performance Metrics and Staff**

We are fortunate at Queens Library to have a full-time demographer on staff. Because Queens is such a diverse county, the demographics shift very often, and we need to make sure we are serving our entire population. While we use the metrics mentioned above very regularly, we also are able to harness the knowledge of our own staff to gather even more information. After we run standard metrics, for example, our demographer is able to help us analyze what is going on in each library’s location, in terms of which ethnic groups have moved into the area and also which groups have left. That information is so valuable for us, both in collection development and in planning programs. For
example, a library that may have had a large Hispanic population just five years ago now has a growing number of Chinese immigrants. Once we have these key facts, we can work to make each library in our system a destination.

**Using Industry Metrics**

While libraries should analyze their local performance metrics, it can also be very helpful to also consider industry metrics. With data from such sources as the Public Library Data Service Statistical Report (PLDS), see sample page below for example, a library can compare its statistics with that of similar library systems. If one library is serving a population of 300,000 but is only receiving an average of $10 per customer in funding, it can compare its numbers to a similar library that is receiving $30 per customer. A case might be made to argue for a larger budget or to demonstrate local efficiencies. Usage statistics can be valuable to demonstrate support for local budgets.

Industry metrics are also available other sources. In addition to the Public Library Data Service Statistical Report (available for $135 on the ALA website, under PLA/Publications and Products), there are also statistical reports available from the Institute of Museum and Library Services (IMLS). With statistics collected by more than 9,000 public libraries, this is an excellent source for comparison. The American Library Directory is yet another source for industry metrics. Additionally, each state has reports on its public libraries. For example, in New York State, the database Bibliostat Connect contains data from the Annual Report for Public and Association Libraries.

The table on the following page, taken from the 2010 Public Library Data Service Statistical Report, contains annual use figures that include Queens Library. The table analyzes circulation statistics for public libraries sorted first by population size. It then separates circulation into print materials and electronic (CD/DVD), with a separate section for all other materials. In addition, the table analyzes circulation at each library’s central location, then by branch.

While the sources cited above can be very helpful when researching performance metrics in libraries other than one’s own, it’s also essential to research the literature. For example, an article (Gallagher 2010) in The Bookseller, a trade publication that covers international libraries, shows a statistic of note: borrowers favor fiction over nonfiction. An article such as this one can guide public libraries, ensuring that they’re purchasing more fiction than nonfiction.

Another article from Library Journal (Malczewski 2011) indicates that, despite worries of DVDs being replaced by streaming video, public libraries have very high DVD circulation (2.1 million items each day), second only to Netflix (2.2 million). Researching current library statistics can assist libraries with collection development and strategy. Without this knowledge, it’s harder to make strategic and sound decisions.

**Conclusion**

The value of gathering performance metrics cannot be overstated. More and more, libraries have to justify their very existence to government legislators at the federal, state and city level. They need to prove why, in a time of increasing free information, they are still relevant. By using performance metrics, libraries are able to use hard numbers to prove how indispensable they are. They can show how many customers are using their job information resources, how many customers rely on them to provide value-added information, and how many customers are getting free literacy classes at their local library (just a few examples). With performance metrics, libraries are much better equipped to show how much their communities need them.
Notes


Don’t Cut It Alone:
A Team-Based Approach to Surviving a Budget Cut

By Michael J. Aloi

Abstract: Library directors at small and medium-sized academic institutions tend to have unilateral control in a budget-cutting situation. Often overlooked, however, is how important it is to inform, consult, and glean critical knowledge from librarians and library staff before making the unpleasant decisions. The institution examined in this article recently faced a double-digit percentage cut of its entire library budget, and was already one third of the way through its fiscal year. While the institution technically has no library director, the article details how one librarian stepped forward to take the lead role during the crisis and involved all librarians and staff in a team-oriented approach to make the necessary cut a reality.

Introduction

Libraries are not immune to budget cuts, and library directors know that when they take the job. When an academic library is dependent on anticipated tuition revenue and administrative decisions, there is always the potential for budget cuts. No income stream is permanent, and no budget safe. Library directors also know or quickly learn that financial analysis skills are essential, both for preparing the budget and dealing with cuts when they occur.

But while library directors at small and medium-sized institutions are ultimately responsible for the entire library budget, all too often librarians and library staff are not familiar enough with the budget or the budgeting process to recognize when problems are imminent or how to address them when they arrive. This doesn’t mean that the library director must or should cut the budget by making unilateral decisions. Librarians and staff work intimately with library resources, and see the outcomes of many library expenditures on a first hand basis. Having this knowledge and experience is critical in order to make the best decisions possible in a budget crisis. The trick is how to illustrate the situation for them in a way that is easy for those without a financial background to understand. This article will detail how a library director can use a simple spreadsheet program and some graphs to illustrate a budget cut and resulting precarious position of the library to all staff, paving the way for all library employees to combine their knowledge and
experience to deal with the budget cut as a team. The example in this article was based on a real situation at an academic library.

The Institution

The institution described in the example in this article is a private, mid-sized, four-year liberal arts institution. The library has an unusual organizational structure in which all nine full-time librarians are tenure track faculty and form a self-managed team. This team collectively dictates the direction of the library and reports to the College Provost on a regular basis. The library staff is organized under one Staff Supervisor who works jointly with the librarian team, and also reports to the Provost. Since the library has no director, the team approach is crucial to dealing with all library-wide issues and problems.

The Budget

Preparation of the library’s annual budget is somewhat of a jigsaw puzzle. Different librarians are responsible for, and thus budget for, different types of resources. The Staff Supervisor budgets for the operating expenses with the help of various clerks who handle the invoices. The annual library budget does not include employee salaries or capital improvements, only annual operating expenses and library resources. Once the entire budget is pulled together, the Department Coordinator and Staff Supervisor jointly present the budget to the administration for approval in the Spring, and by July 1 there is a total dollar figure for the library for the year (July 1 – June 30). The budget is then loaded into the library accounts periodically throughout the year, and disbursements are made.

The Cut

The year that the budget cut occurred, word came down through the Department Coordinator and Staff Supervisor that some trimming needed to be done. However, with no one individual in charge of the library budget, who decides what gets cut? Decisions had to be made to avoid the undesirable last resort of having college personnel outside the library making the calls. Even though all of the librarians on the team had their different areas of expertise, financial analysis skills were not required for any of them. Someone had to step forward, and everyone knew that one librarian had a previous career as a CPA. Despite being in only his second year at the institution, he was called on to be the lead librarian on this issue and help sort it out.

The Conundrum

“The major discretionary area of any library’s fiscal resources is the information resources budget.” (1). This institution was no different. All the lead librarian knew of the total library budget at the time was that the bulk of the funds went to three large lines: Databases, Periodicals, and Books. Each of them was monitored by a different librarian, none of them by him. As he learned, it’s the timing of the annual cycle that can create a conundrum for academic libraries. First of all, many expensive resources, such as periodical and database subscriptions, are paid for up front in August and September. This frontloading may be due to the terms of the agreement, or to capitalize on advantageous price discounts. At this institution, over three quarters of the total dollars allocated to electronic resources are spent by September 30, and database subscriptions generally cannot be canceled for even a partial refund during the current year.
“Serials are crowding out monographs in library acquisition.”  

Secondly, the problem gets worse every year. As more and more resources are digitized and made available online, including backfiles of many journals, database subscriptions give libraries more bang for their ever-decreasing bucks. As a result, “the growing area of electronic or online resources … represent a larger if not the largest proportion of the total funds allocated for all information resources.”

Third, “[w]ith print resources, price increases from year to year are generally predictable and stable; with electronic resources, prices can change dramatically and without warning, particularly if vendors feel that libraries will be unable to drop heavily used items, regardless of expense. Moreover, calculating the price of electronic resources is challenging, because librarians often must purchase a package of journals or reference tools, rather than selecting individual items of interest.”

With many of the big ticket items bought and paid for when the school year has barely started, the flexibility to cut the budget later is already in jeopardy. It was explained to the lead librarian that in a previous year, a cut had occurred and since most of the Periodicals and Databases Budgets were spent, the entire cut came out of the Book Budget, which took a hit somewhere around 75%. The Collection Development Librarian who monitors and spends the Book Budget was adamant that that not happen again. It was a fair and valid point. After all, the Book Budget pays for many critical items later in the year, including monographs needed to support new courses that can begin at different times. This obligation cannot be ignored, as “[t]he library … needs to support fledgling programs that are just getting started, as well as the rest of the university.”

The following process describes how the lead librarian led the way for all personnel to successfully handle the budget cut as a team. Even though this library’s organizational structure is somewhat unique, library directors thrust into this same position will also benefit from this approach. The example will demonstrate how including librarian and staff knowledge into the budget analysis and cutting procedures is vital to directors, even if unilateral budget decisions are theirs to make. The numbers that follow are fictitious for simplicity’s sake, but the narrative is real.

**The Approach**

The first step in the process was to hold a meeting to discuss the situation with all the major players. This was not a regular departmental meeting with the budget as an agenda item. This was a Budget Meeting. All librarians were included, regardless of whether or not they monitored any budget lines. Their input on the value of individual resources would be crucial. This meeting also included the staff, as they had routine dealings with many vendors and had first hand knowledge of how the budget is spent. This problem was going to be dealt with as a team.

Before discussing actual numbers, the meeting had to begin with the frustration factor. No department in any business likes having their budget cut, and the usual discussion about whether the library is valued enough by others on campus was discussed. As Leonard states, libraries are “[o]ften viewed as a supporting unit at the institution [and] usually given a low place in the hierarchy when new programs and projects are instituted. The library budget is seen as an ‘overhead’ cost and therefore can be prime candidate for reduction.” It was incumbent on the Department Coordinator and Staff Supervisor to underscore the fact that all departments in the college were being asked to trim. It was also pointed out that in years with a revenue surplus, the library received a share of the additional monies in the form of desired capital improvements as well as other considerations. The point was driven home that the library was not being singled out and that the revised figures were real, and had to be addressed.
Defining the Problem

One good thing was that the library team had a history of handling the library budget honestly and accurately in the past. As Birdsal (7) points out, “[t]he trust that university administrators have … begins with the knowledge that all funds have been managed within established university guidelines. The absence of budgetary surprises for central administrators also builds credibility, as does the presentation of honest and accurate data in support of program requests. The university will equate fiscal responsibility with a … rational and analytical approach to budget decisions.” (1995).

Because of this trust placed in the library team, the administration did not attempt to pick and choose particular cuts from the library budget but rather provided the budget cut in the form of a specific target number as a percentage. Cut to “X” percent of the original budget and the problem is solved. While the number was unnerving, the fact that the library had complete flexibility to cut wherever desirable was a small but useful advantage. Another advantage was the administration’s commitment to disbursing the funds to the library up front if necessary. This meant money could be spent ahead of the college’s planned schedule, provided the total for the year did not exceed the new bottom line. This meant that discount opportunities could still be maximized without concern that, as a result of the cut, some spending might shift earlier in the fiscal year. The next step was to translate the cut from a percentage into actual dollars, and show it to the librarians and staff in the simplest way possible.

For example, say the original budget was $500,000 and a 20% cut was demanded. It is a simple calculation, even for those with little financial analysis skills. But in order to deal with the problem, there is no substitute for a visual representation. The lead librarian brought to the initial meeting a simple spreadsheet created in Microsoft Excel, as in Table 1:

<table>
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<th>Approved budget 2006-2007</th>
<th>$500,000</th>
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<tr>
<td>Total % to be received</td>
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<td></td>
<td>100%</td>
</tr>
<tr>
<td>Spent as of 11/15/06</td>
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<td>$279,000</td>
</tr>
<tr>
<td>Remaining Funds - Actual</td>
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<td>$221,000</td>
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<tr>
<td>Remaining Funds - Budgeted</td>
<td>$221,000</td>
</tr>
<tr>
<td></td>
<td>$221,000</td>
</tr>
<tr>
<td>Amount we need to CUT</td>
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</tr>
<tr>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

This spreadsheet serves as a starting point from which to work, and compares the old reality to the new reality. It shows how the library is now overbudgeted and presents the amount as a lump sum, underscoring the seriousness of the situation. It also gives the impression that the budget cut is everyone’s problem. It should be noted that since budget cuts never happen on the first day of the year, the cuts cannot come from whatever portion has already been spent. In this case, the cut is implemented on November 15, more than a third of the way through the July 1- June 30 fiscal year. The $100,000 cut can only come from the $221,000 budgeted amount not yet spent.
The figures for this and future schedules come from the records of the library staff, and the analysis could not have been done without their help. They are the ones who work with the accounts every day, entering invoices for payment and pricing resources and other library needs. One particular clerk keeps all librarians informed of the budget status by providing “budget update reports” each time invoices are paid. Including the staff in both the budgeting and cutting processes provided invaluable information, and kept the figures under discussion as current as possible.

**Past Mistakes**

Mathematical realities generally mean that big cuts can only come from big accounts. Yet just because the big accounts are inevitably affected, doesn’t mean the solution is to pick one, slash it, and call it a day. This is what cost the Book Budget a whopping 75% when the last cut occurred. While the lead librarian was not at the institution at that time, the Collection Development Librarian kept the budget update reports from each year. The lead librarian took these from her and again used Microsoft Excel, this time to illustrate her concern.

By using the simple graphing function in Excel, he was able to show the depositing of budgeted funds into the three large accounts as a percentage over time. The Periodicals and Database Budgets get loaded earlier, in order to pay the up front costs of annual subscriptions. The Book Budget has a smoother depositing of funds, reflecting the smoother use of the funds throughout the year. By the end of the year, all accounts were fully funded. Figure 1 above shows the first chart for Fiscal Year “A”, in which there was no budget cut.

Compare this to Figure 2, the same chart for Fiscal Year “B”, the year of the last budget cut. When the budget was cut, this time in late December, funds are actually shifted out of the Book Budget to pay for commitments in the Periodicals and Databases Budgets, ultimately leaving just 25%, hence the 75% cut. These charts, put together using the simple graphing feature of Microsoft Excel, help frame the budget process in a visually understandable format.
The “flatlining” of the Book Budget for the entire second half of the year is obvious. For the first time, the Collection Development Librarian had a visual, irrefutable explanation for why the previous cut method was unacceptable.

A New Way Forward

With the scrapping of the old method, it was time to take a fresh look at where the cuts would come from. The next simple spreadsheet (table 2) gave details of where the budget stood, but this time at the account level. It showed how much had been spent from each account and what was left, making sure the figures were as current as possible. A blank column was left for the cuts and the totals were included to serve as target numbers. Of course, the math was double-checked beforehand. Others cannot make accurate decisions and will lose faith in the process if they keep finding calculation errors in the work.

This process would obviously become much more complex in larger libraries with bigger budgets and more accounts. Yet even at large institutions with separate library departments and multiple levels of management, accounts still need to be examined one by one. Spreadsheets and graphs are tailor-made for this purpose, as in the case of the Serials Budget at the University of Oregon, where Director of Budget and Management Information Services Nancy Slight-Gibney uses them to communicate information to budget managers, collection managers, and teaching faculty. (8) At smaller or medium-sized institutions where the whole budget can be examined at once, accounts can be left out which the director has no intention of cutting. The listed items can be limited to only the targeted accounts available for cutting. This would help focus the discussion and avoid wasting time lamenting untouchable accounts.
It became necessary for Operating Accounts to be broken out and shown separately from the library’s Resource Accounts. In many instances, the Operating Accounts are essential and can ultimately be “small potatoes” in pure dollars. In the example above, the Operating Accounts are budgeted at $75,000, or 15% of the total budget. This was a realistic percentage for the library. In fact, an analysis of the five years prior to the budget cut revealed that the Operating Accounts consistently comprised only 10-15% of the total budget.

The Operating Accounts were ultimately included in the chart because some pruning is always possible. But though every little bit helps, it is rarely going to be the whole solution. For example, it was expressed that student printing was excessive and that the budget would not be in such bad shape if there were a charge for printing or a limit to the number of student prints. The groundswell of support for this cut grew when it was pointed out that many other institutions already charge for this. However, the spreadsheet detailed how the printing expenses were only a small portion of the total Operating Expenses. Restricting student printing was not going to solve the overall problem, and could only serve as a small trim. Once it was concluded that the limited benefit of this cut would never outweigh the drawbacks in terms of angry students and an administration annoyed by student complaints, this approach was abandoned.

<table>
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<th>Acct #</th>
<th>Account Name</th>
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<th>Spent as of 11/15/06</th>
<th>Amount Remaining</th>
<th>CUTS</th>
<th>Revised Amount Remaining</th>
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<tbody>
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<td>Office Supplies</td>
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<td>2,532</td>
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<tr>
<td>P 0002</td>
<td>Software</td>
<td>6,000</td>
<td>1,586</td>
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<td>E 0003</td>
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<td>A 0005</td>
<td>Service Contracts</td>
<td>50,000</td>
<td>43,185</td>
<td>6,815</td>
<td></td>
<td></td>
</tr>
<tr>
<td>T 0006</td>
<td>Membership Dues</td>
<td>3,500</td>
<td>2,700</td>
<td>800</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I 0007</td>
<td>Promotion Exp.</td>
<td>1,000</td>
<td>200</td>
<td>800</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N 0008</td>
<td>Printing</td>
<td>6,000</td>
<td>2,897</td>
<td>3,103</td>
<td></td>
<td></td>
</tr>
<tr>
<td>G 0009</td>
<td>I.D. Cards</td>
<td>1,500</td>
<td>900</td>
<td>600</td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Spent Revised</th>
<th>Revised Amount Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total - Operating</td>
<td>75,000</td>
<td>54,000</td>
</tr>
<tr>
<td>1001 Outside Services</td>
<td>8,000</td>
<td>1,618</td>
</tr>
<tr>
<td>R 1002 Library Books</td>
<td>75,000</td>
<td>19,735</td>
</tr>
<tr>
<td>E 1003 Standing Orders</td>
<td>43,000</td>
<td>22,228</td>
</tr>
<tr>
<td>S 1004 Periodicals</td>
<td>69,000</td>
<td>38,167</td>
</tr>
<tr>
<td>O 1005 Government Docs</td>
<td>500</td>
<td>0</td>
</tr>
<tr>
<td>U 1006 Microfilm</td>
<td>18,000</td>
<td>11,578</td>
</tr>
<tr>
<td>R 1007 Videotapes</td>
<td>13,500</td>
<td>4,773</td>
</tr>
<tr>
<td>C 1008 Library Supplies</td>
<td>6,000</td>
<td>1,689</td>
</tr>
<tr>
<td>E 1009 Databases</td>
<td>190,000</td>
<td>125,063</td>
</tr>
<tr>
<td>S 1010 Interlibrary Loan</td>
<td>2,000</td>
<td>149</td>
</tr>
</tbody>
</table>

| Total - Resources | 425,000         | 225,000                 |

| Total - All Accounts | 500,000 | 279,000 | 221,000 | 100,000 | 121,000 |

Don’t Cut it Alone
One by One

The next step was to take each account in turn and discuss what can be pared down and what cannot. This can be done at a subsequent meeting, giving the parties responsible for each account the opportunity to collect their thoughts. The responsible parties should briefly remind the team what’s budgeted in each account, and whether or not items have already been paid for.

This process, while at times tedious, will unearth and identify many concerns. Any surplus in the accounts will become evident, and can be easily stripped out. Suggestions to cut things already paid for will be avoided. A special benefit to this approach is that librarians responsible for specific accounts will not have to be protective about the resources for which they are responsible. McGeary and Hartman declare that the budgeting and cutting process “can be quite subjective and political in nature.” (9). For a library director to call one person at a time into a private discussion and then make a decision doesn’t always glean all of the input available. Often, a librarian responsible for a particular area may not even agree that his/her area is more valuable than some others, and thus may not be the best advocate for that area. Through a group discussion approach, no decisions are made behind closed doors, and librarians who are the most vocal about not sacrificing specific resources will not “win” by being the “squeaky wheel”. By discussing as a group, all members of the team can agree on what has to go. When led by the library director, this approach would let all information and opinions be heard while reserving the actual decision to themselves, and avoid the hassle of having to explain decisions to disgruntled librarians and staff who may feel they have “lost” a money struggle.

Also, any instances of “double budgeting” will surface. Shocking as it sounds, when different librarians budget for resources and several staff process the bills, it may go unnoticed that two different budget lines included the same resource. This occurrence led to a new policy of having staff file paid invoices by account number, rather than alphabetically by vendor name. If there is confusion about which budget line should include a particular item, a quick check of last year’s files will provide the answer.

Another benefit to this analysis is that all librarians and staff gain a broader perspective about the nature of the library expenditures and the level of thought that goes into the budgeting process. For example, a review of the Operating Accounts identified a service contract for a company to take care of all of the plants in the library. Discussion indicated that it was important to make the library feel welcoming to the college community, and it was decided the contract would be kept. Then several staff explained that the plant company was only watering the plants, and hadn’t repotted anything in over a year despite being asked repeatedly. It was decided that library employees could water the plants themselves, and money was saved there. Also in the Operating Accounts was a conference budget to fund attendance for all nine librarians at a local library conference. It was suggested that since the college provides all faculty members professional development funds each year, the librarians should pay for their own attendance.

While the Operating Accounts yielded some unexpectedly easy pruning, the Resource Accounts was where the bulk of the cutting had to be made. Since the annual library budget is flexible each year, the goal was not to cut things permanently, but rather to do what was necessary to get though this cycle. Information volunteered by the Collection Development Librarian, Serials Librarian, and Electronic Resources Librarian was critical in understanding what Books, Periodicals, and Databases were in place and what topics they covered. As it turned out, a meeting to cut the budget had the added benefit of making all librarians more aware of the collection development methods of the library.
Overlap between the printed journals and the database coverage came to light and presented opportunities for cutting. Analysis of the usage statistics of various resources provided evidence of possible waste. Those who were not familiar with the large Resource Accounts learned which subscriptions were packaged together and which were the easiest to stop and recover later. There were also frank discussions about some purchases of resources which may have been made simply to continue a set of materials in order to have the complete set for vanity purposes. These decisions can be very difficult to make, and affect not only the library, but the entire faculty on campus. “Electronic technologies are requiring us to reconsider the importance of on-site ownership of materials. At the same time, faculty, as well as some librarians, want not only the electronic sources but also the print sources as ‘back-up’.”

Also discovered was the potential for temporary cuts in our standing orders. Certain reference materials are published annually and the newest edition is automatically paid for and received. In an institution with two campuses, the current edition is usually housed at the main library, with the previous year at the other campus. All older editions are discarded. Temporarily canceling some standing orders saved a significant sum, with very little recovery time needed. When reinstated, the current edition would arrive in a timely fashion, and in less than two years the library would again have the two most recent editions. At that point the library would be in exactly the same place as it would have been had the item not been temporarily canceled.

### Document the Cuts

**Table 3**

<table>
<thead>
<tr>
<th>Acct #</th>
<th>Name</th>
<th>Title</th>
<th>Amount</th>
<th>Method of CUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1003</td>
<td>Standing Orders</td>
<td>Title</td>
<td>20,000</td>
<td>Temporarily Canceled</td>
</tr>
<tr>
<td>1004</td>
<td>Periodicals</td>
<td>Package</td>
<td>15,000</td>
<td>See list</td>
</tr>
<tr>
<td>1006</td>
<td>Microfilm</td>
<td>Title</td>
<td>5,000</td>
<td>See list</td>
</tr>
<tr>
<td>1007</td>
<td>Videotape</td>
<td>Title</td>
<td>4,052</td>
<td>See list</td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database A</td>
<td>805</td>
<td>Partial Cancellation</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database B</td>
<td>10,800</td>
<td>Canceled</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database C</td>
<td>2,218</td>
<td>Canceled</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database D</td>
<td>2,078</td>
<td>Went with Cheaper Vendor</td>
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<td>1009</td>
<td>Elec. Res. Database E</td>
<td>1,300</td>
<td>Discontinued</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database F</td>
<td>879</td>
<td>Reduced Usage</td>
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<tr>
<td>1009</td>
<td>Elec. Res. Database G</td>
<td>799</td>
<td>Canceled</td>
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</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database H</td>
<td>604</td>
<td>Canceled</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database I</td>
<td>415</td>
<td>Canceled</td>
<td></td>
</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database J</td>
<td>157</td>
<td>Canceled</td>
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</tr>
<tr>
<td>1009</td>
<td>Elec. Res. Database K</td>
<td>150</td>
<td>Canceled</td>
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</tr>
</tbody>
</table>

**Operating Accounts**

5,000

**Total CUTS**

81,257

**Additional CUT Needed:**

<table>
<thead>
<tr>
<th>Acct #</th>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1002</td>
<td>Books</td>
<td>18,743</td>
</tr>
</tbody>
</table>

**Total CUTS**

100,000
While it might be a relief to hit the target number and realize that it is, in fact, possible to survive the cut, the work does not end there. A list of the actual cuts was kept as shown in example Table 3. Remembering what was cut, why it was cut, and how much it cost will help in adding them back, and also determining if you even want to add something back. The list can serve as a running total, since it may take multiple discussions for the cuts to add up to the target number. Prioritizing the list can also be helpful by creating a pecking order for quick decisions, and allowing for adjustments if the actual budget cut turns out to be smaller than for what the team planned. If the cut is increased, the list can serve as a record of what has been done already, negating the need to start from scratch. Keeping a separate list of what would have been cut had it not already been paid for can also help if another cut is on the horizon.

The list in Table 3 is sorted by account number and again includes example figures. While databases always sound expensive, it turned out there were many that were smaller in price as they were stand-alone subscriptions. They just didn’t get enough usage. The Serials Librarian kept separate lists of the periodicals and microfilm that were canceled, since there were too many titles to list here. It should also be noted that the Electronic Resources Librarian and Serials Librarian, while working independently, used the same method to implement the cuts. The Serials Librarian first targeted any titles that were available full-text in the databases, then both librarians eliminated based on low usage, then subject content overlap, and finally price.

Along with a small amount in cuts from the Operating Accounts described earlier, the total of the specific cuts in the example is just over $81,000. This leaves the Book Budget to make up the balance. Since the Book Budget started with $75,000, the final cut was around 25%, a far cry from the 75% which was the real cut several years ago.

Talk to Faculty

Hye-Kyung Chung states that academic libraries can make better cutting decisions if they “base their decisions on combined information from local use studies as well as faculty opinion.” (11). Throughout the cutting process, tactfully discussing the potential sacrifices with other faculty on campus can be helpful. Once resources are identified that are underused, high priced, or overlap too much, these potential cuts should be mentioned to faculty members who would be the most severely impacted. Most of the time, these faculty will not want their resources taken away or will not like feeling singled out, and may help lobby for more funding for the library. Faculty may not even know how much information was at their fingertips already. As Iber found out at her institution, “[t]his part of the process also raised the awareness of the teaching faculty about the serials collection and how the library has approached its management. They had more titles available to them than they realized, especially electronically through aggregators.” (12)

One trap to be avoided is automatically cutting expensive, high-level research tools that are used more by the faculty than the students. While the curriculum must be supported, faculty research and its resulting products, papers and presentations are essential not only to the reputation of the overall institution, but to the job satisfaction of the qualified faculty the institution desires to retain. “Therefore, maximizing the subscriptions used in research is vital to the library’s survival in supporting the research of its institution.” (13)

Another trap is trying to protect resources for library-friendly faculty by cutting subject areas in which the faculty are perceived to be unfriendly. Those faculty may be just as protective of their subject areas and quite possibly, the ones who once decried the library as useless could wind up being the ones now lobbying for the resources! Ironically, a budget cut may be a catalyst for many faculty on campus to gain an improved awareness of the library and its resources. This can be helpful going forward, as support from other faculty is often crucial when trying to convince the administration of a library need.

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Final Results

Table 4

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Account Name</th>
<th>Budgeted Amount</th>
<th>Revised Budgeted Amount</th>
<th>Spent As Of 11/15/06</th>
<th>Amount Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>Outside Services</td>
<td>8,000</td>
<td>8,000</td>
<td>1,618</td>
<td>6,382</td>
</tr>
<tr>
<td>1002</td>
<td>Library Books</td>
<td>75,000</td>
<td>56,257</td>
<td>19,735</td>
<td>36,522</td>
</tr>
<tr>
<td>1003</td>
<td>Standing Orders</td>
<td>43,000</td>
<td>23,000</td>
<td>22,228</td>
<td>772</td>
</tr>
<tr>
<td>1004</td>
<td>Periodicals</td>
<td>69,000</td>
<td>54,000</td>
<td>38,167</td>
<td>15,833</td>
</tr>
<tr>
<td>1005</td>
<td>Government Docs</td>
<td>500</td>
<td>0</td>
<td>500</td>
<td>500</td>
</tr>
<tr>
<td>1006</td>
<td>Microfilm</td>
<td>18,000</td>
<td>13,000</td>
<td>11,578</td>
<td>1,422</td>
</tr>
<tr>
<td>1007</td>
<td>Videotapes</td>
<td>13,500</td>
<td>9,448</td>
<td>4,773</td>
<td>4,675</td>
</tr>
<tr>
<td>1008</td>
<td>Library Supplies</td>
<td>6,000</td>
<td>6,000</td>
<td>1,689</td>
<td>4,311</td>
</tr>
<tr>
<td>1009</td>
<td>Databases</td>
<td>190,000</td>
<td>157,795</td>
<td>125,063</td>
<td>32,732</td>
</tr>
<tr>
<td>1010</td>
<td>Interlibrary Loan</td>
<td>2,000</td>
<td>2,000</td>
<td>149</td>
<td>1,851</td>
</tr>
<tr>
<td><strong>Total Resource Accounts</strong></td>
<td><strong>425,000</strong></td>
<td><strong>330,000</strong></td>
<td><strong>225,000</strong></td>
<td><strong>105,000</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Operating Accounts</strong></td>
<td><strong>75,000</strong></td>
<td><strong>70,000</strong></td>
<td><strong>54,000</strong></td>
<td><strong>16,000</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Total Budget</strong></td>
<td><strong>500,000</strong></td>
<td><strong>400,000</strong></td>
<td><strong>279,000</strong></td>
<td><strong>121,000</strong></td>
<td></td>
</tr>
</tbody>
</table>

After the process is complete, all librarians and staff were presented with the final results. As in the example in table 4, the final results showed all cuts by account, the revised budget, what’s been spent and what is left to be spent. This will make sure everyone remembers where the sacrifices were, and can serve as an accurate page for everyone’s records.

Conclusion

Managers make the best decisions only if they first gather as much information as possible. All library employees, from the director to the librarians to the clerks and staff, have valuable knowledge of the library resources which can be useful in the event of a budget cut. In order to make the best use of this knowledge, it must be made clear to everyone the circumstances of the cut and the difficult position in which the library has been placed.

With the use of a basic spreadsheet program, it is possible to briefly and accurately display the circumstances that currently face the library at any point during a budget year. These can easily be modified to illustrate the situation in the event of a budget cut. Clearly stated numbers can help focus the discussion where it counts, and avoid fruitless haggling over impractical solutions, as well as frustration and suspicion over surprise decisions made behind closed doors.

Effective budget cutting should not be a one-person activity. Only with the combined knowledge of the timing, price, usefulness and value of all expenses can a budget be efficiently cut. The input of all library personnel is critical to weigh and examine the importance of each library resource or operating cost against all of the others. While final
decisions will always be made at the top, a team approach maximizes the potential to meet the necessary cut with minimal sacrifice and the least interruption of library services.

Notes:


