

Planning A Future Workforce: An Australian Perspective

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Abstract

Libraries throughout the world are facing the dual challenge of an aging workforce and a workplace which is requiring significant reassessment of the skills base of its staff as a result of the impact of technology on the delivery of information services. The implications for libraries in responding to this environment are significant. This paper looks at the age profile of the library workforce and discusses the need for libraries to acknowledge and plan for the impending retirement of a significant proportion of their workforce. The paper argues that integral to this planning is the need to identify the skills and attributes required of library staff in both the short and long term. The response of some Australian academic libraries in preparing to address these challenges is described. Particular reference is made to strategies adopted at Queensland University of Technology Library in Brisbane, Australia to ensure that existing and new staff are equipped with the skills to be able to work in changing environments and that staff are provided with opportunities to develop leadership skills that will be required for the future.

Keywords

age profile, succession planning, leadership development, workforce profile

Introduction

Libraries throughout the world are facing the dual challenge of an aging workforce and a workplace which is requiring significant reassessment of the skills base of its staff as a result of the impact of technology on the delivery of information services. The implications for libraries in responding to this environment are significant. This paper looks at the age profile of the library workforce and discusses the need for libraries to acknowledge and plan for the impending retirement of a significant proportion of their workforce. The paper argues that integral to this planning is the need to identify the skills and attributes required of library staff in both the short and long term. The response of some Australian academic libraries in preparing to address these challenges is described. Particular reference is made to strategies adopted at Queensland University of Technology Library in Brisbane, Australia to ensure that existing and new staff are equipped with the skills to be able to work in changing environments and that staff are provided with opportunities to develop leadership skills that will be required for the future.

Age Profile Of The Library Profession

The age profile of the library profession is the subject of increasing interest for our profession, as borne out in the increasing volume of literature on the topic and the discussion and speculation about the impact of impending retirements in the workplace.

The Association of College and Research Libraries Ad Hoc Task Force on Recruitment and Retention Issues 2002 White Paper [1] reflects on the issue of how, given the age profile of the profession in the US, the profession can respond to what it sees as a rise in the demand for library professionals in a world where information and communication technologies now permeate every aspect of business, leisure and personal life. Wilder [2] reports from US Census data taken in 2000 that 52,000 US librarians were aged 55 and over. He points out that as thousands of US librarians retire over the next 10 years, that they will take with them a vast amount of accumulated experience and leave behind a host of staffing and organisational issues. Wilder's predictions are confirmed by Lynch et al [3] who claim that:

In the decade beginning in 2010 ...45% of today's librarians will reach age 65, representing the early wave of baby-boom librarians reaching the traditional retirement age.

The 8R's Canadian Library Human Resources Study [4] reports that 1996 census data indicates that 50% of Canadian library professionals were over the age of 45 and that, after 2006, there would be double the number of librarians turning 65 than there had been in the previous ten years.

The situation in Australia is similar. 2004 Federal Department of Employment data indicates that 52% of Australian librarians are over 45, with 20% being over 55.

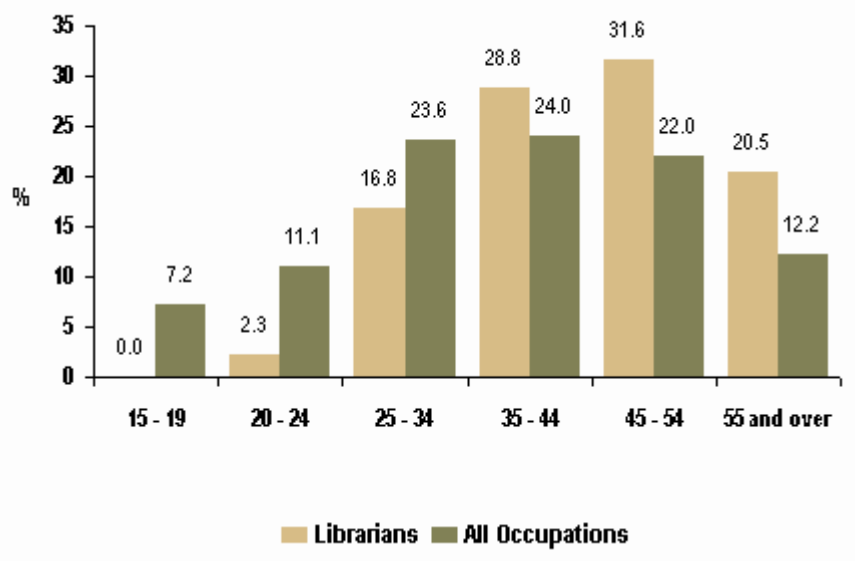


Fig. 1 Australian Librarians Age Profile [5]

At Queensland University of Technology [QUT] Library, the average age of staff is 43 years, with 34% of the Library's staff being over the age of 50. The graph below shows the spread of ages across the full classification ranges in the Library. There are significant issues for the QUT Library when it analyses this data. Not only does it reveal the high proportion of staff over 50 but it also indicates that 80% of the senior managers are over 50. As well, a large proportion of staff in supervisory roles are in this age bracket.



Fig. 2 Queensland University of Technology Library Age Profile

This age profile is mirrored in other Australian libraries. Curtin University of Technology reports that 52% of its staff are over 45, with 15 % being over 55 [personal email]. At the University of Technology Sydney 49% of the staff are over 45, with 10% over 55 [personal email].

Whilst the age profile of libraries internationally is of concern to our profession, what makes this situation of even greater concern is the fact that many of the staff who will be leaving the workforce within the next five to ten years are at senior levels within their organizations. As previously mentioned, at QUT Library 80 % of the senior staff are in the 50+ age bracket. This profile is probably not atypical of the age/seniority profile of many academic libraries around the world. Whitmell [6] reports:

Many of our academic and public institutions grew at a frenetic pace just as many of the Baby Boomers were beginning their careers. Many of them have stayed with the same library for the past 25 to 30 years. Thus since the lean times of the 1990's when the number of new hires was reduced the Boomers have become the predominant age working group.

The 8R's Canadian Library Human Resources Study [7] similarly points out:

Budget cutbacks have resulted in the elimination or merging of middle and senior positions as they become vacant, therefore limiting the number of positions to provide leadership grooming for mid-career librarians, as well as limiting the number of leaders who could act as their mentors.

The impact of the overall demographics of the library workforce in terms of age and position level and the fact that many middle management positions have been cut, thus decreasing the numbers of staff with supervisory and management experience, presents a clear challenge and responsibility for current library leaders.

The Changing Nature Of The Library Workplace

Indisputably, change permeates every aspect of our personal and professional lives, to the point where for the new generation of librarians change may be seen as the norm. However, for those librarians who have been in the workforce for some time, and the above data indicates that that is the largest proportion of the library workforce, the extent and pace of change over the last fifteen years has been significant. Clearly, the impact of information and communication technologies has been the driver for most of that change. There seems no function within the present library workplace which is not underpinned by technology.

For library managers leading service development and delivery, analysis of the environment in which service is to be delivered must inform the basis of all aspects of planning. For academic libraries, changes in the areas of learning and teaching, research and publishing, largely influenced and enabled by technology developments, have far reaching implications for future planning.

Brewer et al [8] identify some key areas and issues for academic libraries to focus on in the immediate future. These include:

- Identification and management of information beyond traditional published information, including, eg learning objects, data sets
- Development of access systems to facilitate searching across multiple sources and systems
- Leading and managing new directions in scholarly communication, eg open access publishing and self archiving, institutional repositories, institutional academic knowledge management
- Creation of new knowledge products, eg subject portals and subject specific web sites to support learning and teaching
- Development of physical and virtual spaces and services to support new pedagogies, including greater partnerships with academic and specialist support staff.

Sitting beneath the ability of libraries to respond to these demands are complex policy and technical issues involving digitization, preservation, infrastructure, copyright, licensing and other legal issues, let alone skills in communication, negotiation, collaboration and business planning required to embark on establishing such services within individual institutions.

As the profession considers how it will respond to these new opportunities for service development, we need to recognize that a large proportion of our client base still requires and values traditional library services including print collections, face to face services and the physical space of the library.

Change At Queensland University Of Technology Library

At Queensland University of Technology the impact of developments in information and communication technologies, research into learning and teaching strategies and changing client needs and expectations has informed the university's planning agenda for several years. From a QUT Library perspective, it has been the University's change in approach to learning and teaching, particularly in respect of providing students with more flexible learning which has most influenced service development.[9] More recently through its Blueprint [10] the University has

announced its intention to double its number of higher degree research students by 2010 and to significantly expand its overall research capacity and performance. The focus of this research will be applied, with the intention of developing commercial outcomes. It is expected that much of the research activity will be across academic disciplines. The implications for the Library in providing the range and level of services to support this growth are significant.

Many of the Library's new services can be seen as a redevelopment or reinvention of traditional services, driven and underpinned by new technologies [11]. The scope of change is extensive and encompasses, for example:

- design and content of the Library's Home Page,
- development of a collection which now includes a significant proportion of full text electronic resources,
- design of services to exploit 24 x 7 access to electronic resources,
- development of an eprint repository for the university
- management of deposit of QUT theses into a national data digital theses data base
- Membership of curriculum design teams providing advice on the integration of information literacy skills development into curricula
- development on online information literacy training programs for both undergraduate and postgraduate students
- integration of access to information resources and services into the on line teaching resources for each course.

At the same time, face to face services such as liaison services to academic and post graduate researchers and information literacy teaching, coupled with long library opening hours remain an important and valued component of the Library's service.

What Skills Will Library Staff Need In The Future?

The role of libraries as envisioned by Brewer et al [12] and recent developments in services in QUT Library discussed above indicate the changing role of the academic library and the need for librarians to work collaboratively with academics, researchers, learning designers and information technology professionals.

The British Chartered Institute of Library and Information Professionals [CLIP] has undertaken research to identify the skills library staff will need to continue to deliver relevant services. This research is informing the development of its new Continuing Professional Development Program. Fisher [13] reported the following as a summary of professional information skills and generic skills library professionals will need for the 21st century.

Professional Information skills	Generic skills
Knowledge Management	Project management

Information architecture ICT skills Technical (traditional) professional skills	Planning and evaluation People management Research skills Bids and proposals
Subject expertise Collection management Collection description Technical (traditional) professional skills	Critical skills Thinking Planning and evaluation Analysis Problem solving Research
Information technology Design Application Systems User support (problem solving)	Leadership General management Communication skills Strategic management People skills Financial skills
Service Development User information Surveys Service impact analysis Planning and evaluation Promotion and marketing	Promotion and marketing Design appreciation Presentation skills Multi-professional appreciation

Fig 3. Summary of skills for the 21st Century

The Australian Library and Information Association's Core Knowledge Statement [14] recognizes a very similar set of generic and discipline specific knowledge, skills and abilities.

The Project Outline for 8 R's Canadian Study [15] documents a comprehensive approach to collecting both qualitative and quantitative data to inform the response of the profession in Canada and by extension the profession internationally. In the area of supply and demand the study will investigate issues of recruitment, retention, remuneration, repatriation, rejuvenation, re-accreditation, retirement and restructuring .

As practicing librarians we know, as Partridge and Hallam [16] point out in quoting Lovato –Gassman, that:

it takes an extraordinary worker to become a successful professional librarian in the 21st century.

Some Australian Responses

The library profession in Australia has not responded through a comprehensive national strategy to address the issue of its aging workforce and the need to ensure that current and future library staff are equipped with the skills to lead service development and delivery into the 21st century.

Angela Bridgland [17] from the University of Melbourne was one of the first senior library managers to formally raise the issue of workforce planning in Australian academic libraries. Bridgland noted that whilst Australian academic libraries had a strong record of supporting staff development, they had not linked their staff development activities to any long term future planning for their workforce.

Earlier, in 1995, the Australian library profession had identified the need to develop future leaders when the first Aurora Leadership Institute was held. This six day live in Institute is modeled on the US Snowbird Leadership Institutes. The Institute's mission is:

to assist future leaders in the library....industry to maximise their leadership skills and potential..... The Institute programme includes exploration of leadership concepts including vision, risk taking, creativity, communication, and styles of leadership. [18]

Participants usually have up to seven years professional experience and are chosen through an application process from staff in all types of libraries throughout Australia and New Zealand.

In 2004 the Librarians of the Australian Technology Network [LATN] ¹ commissioned Vicki Whitmell, of Whitmell & Associates, a Canadian consultancy firm, to work with them individually and as a group to:

identify overall issues and concerns related to succession and workforce planning among the ATN libraries and their universities and to make recommendations for the LATN group as a whole and its individual members to address these issues. 19]

Between June and August 2004 Whitmell visited each of the ATN libraries to conduct workshops with senior library managers and library staff and, in some institutions, staff from human resource areas. At the end of her consultancy Whitmell provided individual reports to each institution as well as a report covering the LATN group as a whole. In general, Whitmell's report confirmed Bridgland's [20] observations. Whitmell found that ATN libraries had in place a range of activities that furthered workforce and succession planning but that:

none of the libraries had in place plans that demonstrated that.... committed to developing a pool of well-trained adaptable staff who see learning mobility and change as key to their careers and their professional development [21]

Whitmell's [22] key recommendations for the LATN group were:

- Development of a written plan
- Change in recruitment, hiring and retention practices

¹ The Australian Technology Network (ATN) is an alliance of five universities of technology, committed to work together in a spirit of mutual enterprise to give an advantage of scale and skill in seeking to work more closely with the corporate and industrial world.

- Recognition of good work and attributes
- Encouragement of professional development and higher education
- Development of leaders and managers
- Work with the library education community

Whitmell's recommendations for QUT Library [23] were fundamentally similar to the recommendations for the whole LATN group. These included:

- Development of a written workforce and succession plan
- Conduct of an inventory of skills and attitudes needed by the library for both the short and long term
- Revision of selection criteria to focus on learning agility, personal attributes and leadership qualities
- Consideration of all vacancies to see if requirements have changed or new priorities need to be addressed
- Encouragement of staff to take a proactive stance in their own career development
- Identification of staff with leadership and management potential and allow them to take on greater challenges

Work towards addressing Whitmell's recommendations is taking place on two levels, by LATN as a whole and at the individual institution level.

The LATN Group of University Librarians met in early 2005 to consider the recommendations and agreed to undertake a project over the next twelve months to develop an inventory of attitudes, aptitudes and skills for particular roles on library services, commencing with professional level positions, and in the first instance with the role of Faculty/ Liaison Librarian. The project will also determine the educational and training needs for this role.

The choice to investigate the Faculty / Liaison Librarian position first reflects a concern within academic libraries in Australia to define more clearly the role of this position which is the position at the development and delivery end of so many of the new trends and services outlined above, especially in the areas of learning and teaching support and the identification and management of access to electronic information sources.

Queensland University Of Technology Library's Response

QUT Library, in the context of Whitmell's advice, is currently reviewing a wide range of staff management and development activities to ensure that these more explicitly work towards ensuring that the Library positions its current and future workforce to enable the Library to support the achievement of the University's goals.

Strategic Planning

Underpinning and informing this review process is the Library's approach to determining its own goals and objectives. The Library has a Vision for QUT Library Services, 2004 -2007. [24] This document is revised every three years and, along with the suite of QUT strategic planning documents, informs development of the Library's Strategic Plan. The Library's Strategic Plan is framed according to the

Balanced Scorecard perspectives of Client, Financial, Internal Processes and Learning and Growth. The Plan comprises three-yearly Strategic Objectives and a series of annual Action Initiatives to enable the Library to meet its Strategic Objectives. The Vision and Strategic Plan underpin all aspects of development and activity within the Library.

Workforce Planning

The first area of activity centres on a more comprehensive approach to the documentation of a Workforce Plan. The University has required each faculty and division to produce a Workforce Plan for several years. This has been a simple statement of the position levels and numbers of staff in each category that the work area will require in the coming three to five years. Whilst this approach provides quantitative data for the University for budget purposes, in recent years the process that Library has undertaken to provide that data has involved the Library in an more thorough analysis of the structure of and skills required in its workforce, as opposed to a simple calculation of numbers of staff.

Competencies

The Library has commenced the development of Competencies Matrices for key job families and service functions. These identify the key competency areas, and the skills and knowledge required to meet the competencies. The process of developing the Competencies Matrices has caused managers and supervisors in the various service areas to comprehensively review and update their thinking about current service approaches to ensure that staff are clear about the full range of their duties and to be proactive in ensuring that staff have the relevant skills.

The Reference and Information Enquiry Service Competencies Matrix is a good example of how the development process has caused the Library to document its new approach to service delivery in this area. Five core competency areas are identified. For each of the competencies, the skills and knowledge required to achieve each competency have been identified for each of the modes by which the Reference and Information Service is currently provided. These include face-to-face, telephone, e-mail and web-chat. The articulation of these multiple approaches to service delivery through this document was an important step for the Library in formally acknowledging the diversity of skills now required in staff in one of its major service delivery areas

Training and Development Needs Identification

The Competencies Matrices are used by supervisors to assist in identifying training needs during the annual Performance Planning and Review [PPr] process for each staff member. The PPr process identifies and supports work and development objectives for each individual, provides for the constructive evaluation of performance and recognition of achievements and identifies career development needs for individuals. The training needs identified via PPr generally fall into two categories, on the job training and training which needs to be addressed on a library-wide basis.

Each year the Library undertakes a simple Training Needs Analysis to ensure that its staff have the skills to ensure that the Library is able to achieve the goals outlined in its Strategic Plan and Action Initiatives. This process involves the Library's management team and a cross section of staff members in an analysis of the Library's Vision, Strategic Plan and Action Initiatives and the suite of QUT's strategic planning documents, eg, University Blueprint, Learning and Teaching Plan, Research Plan, together with a selection of recent literature covering developments

and trends in library and information service provision generally and higher education in particular. Staff are asked to consider the skills and training implications of this material for QUT Library staff in general and job families specifically.

The training needs of staff identified via the Performance Planning and review process are also included in the training needs analysis process which informs the development of the Library's annual training program. This combination of these two processes ensures that consideration is given to the skills that the staff need to do function in their immediate roles but also ensures that the Library is looking to future roles and their training implications.

Staff development

The Library has a formal staff development policy which outlines the Library's philosophy in respect of staff development and sets out how staff development is managed within the Library. An annual staff development budget is provided. Staff development opportunities are available via a combination of Library initiated and delivered training programs and attendance by staff at internal to QUT and external training and conferences.

Staff are actively encouraged to take advantage of opportunities. The Library has a Key Performance Indicator which sets a target of 90% of staff to participate on one or more training activities in the year. In 2004 the Library's participation rate was 85%.

One of the unarticulated effects of identifying training needs by job families, as described above, is that participation in training is often no longer left to individual choice. When training is being planned, one aspect of the planning is the timing of multiple sessions to enable the maximum number of staff in a job family to participate whilst still maintaining service functions. Supervisors adjust rosters to ensure staff are able to attend training. Since adopting this approach the Library has been able to be more confident that all its staff are trained in key areas.

Leadership and Management Development

The Library recognizes the need to ensure that its managers are provided with opportunities to develop leadership, management and supervision skills. QUT's Human Resources Department provides a suite of training programs for various levels of staff. These include:

- Transition to Supervision
- Team Management Development Program
- Middle Management Development Program
- Manager as Coach
- PPR for Managers
- Recruitment and Selection
- Women in Leadership Program
- Leading in the New Era Leadership Program
- Women in Leadership Programs

The Library has a policy of ensuring that all of its supervisors and managers attend HR provided supervision and management training appropriate to their level. For longstanding supervisors and managers the Library is proactive in ensuring that opportunities are sought for these staff to refresh and update their skills.

The Library also looks to provide opportunities staff at a range of levels to participate in wider leadership development activities. The previously mentioned Aurora program is one such program where QUT has been successful in nominating a staff member to all but one of the Aurora Institutes since their inception in 1995. The Library has also been successful within the University in nominating staff to attend a range of University funded leadership programs offered by the Australian Vice Chancellors Committee. The Library is proactive in encouraging staff with leadership potential to apply for various courses and managers assist staff in completing appropriate nomination documentation to maximise the potential for successful application.

Less formal but equally as important is the Library's commitment to providing opportunities for staff to develop skills through secondments to internal project work or to fill short term vacancies left by overall staff movement. Given that much of the Library's developmental work is now achieved via internal and externally allocated project funding, opportunities for secondments to projects are quite frequent. In recent years development of on line information literacy programs, a course materials data base, an e-print repository and a multiplicity various web development projects have provided many staff with the opportunity to step outside their normal positions and develop a broad array of new discipline specific and generic skills.

The Library also supports and indeed actively encourages staff to apply for secondments outside the Library and has had staff work in information technology and teaching and learning areas. This type of external experience is especially important for staff who aspire to management positions as it provides the opportunity to develop new and wider perspectives. This perspective is particularly important when so much of the work the Library now does at a developmental level requires collaboration between a range of functional areas external to the Library.

The challenge as always with staff development activities is to encourage staff to recognise that their development is a shared responsibility between the employer and the individual.. With an aging workforce the Library faces the additional challenge of keeping its current older staff motivated and trained and providing opportunities for its younger staff to develop. It has become obvious to the Library that selecting staff with a commitment to lifelong learning is essential to the ability of the organisation to develop as a whole.

Workforce profile review

The Library's approach to the University's workforce planning process has also led to a review of some areas of its **workforce profile**. Historically the Library had employed a large number of casual staff in service desk and collection maintenance functions. These staff often worked evening and night shifts and many of them only worked during semester time. Some casuals had been with the Library for many years, generally because the nature of the work and working arrangements suited their lifestyle. Whilst their pay rate acknowledged their casual status, they had no job security and did not enjoy benefits such as holiday pay, sick leave and superannuation contribution from the University. Other casuals came and went in quick succession, as they found more secure employment.

One of the big challenges facing the Library was the training of these casual staff who, as mentioned, often worked after hours and on weekends or who stayed with us for only a short time. In 2002, the Library worked with the Human Resources Department to totally review its expenditure on casual staff and to restructure its staff profile. This resulted in the conversion of over 50 casual positions to 25 ongoing positions. These new positions were designed to provide sufficient hours of work to

have the appointees work across the full range of opening hours and to make the positions and thus salaries sufficient to attract staff who would stay in the positions long term.. Whilst adjusting to new rostering arrangements took some time for both supervisors and staff, overall the review of the staff profile has met the intended goals of better job security for staff, a more stable staff profile for the Library and the ability to provide appropriate training and development opportunities to all Library staff more efficiently.

Another significant area of staff profile review was undertaken in 2004. The Library had two classification levels in its Lending Services area, one to cover staff who mainly undertook shelving and related duties and one that included staff who undertook duties related to lending and document supply. However the nature of work in Lending Services had changed because of:

- the application of technology based solutions and applications to many areas of work in the Lending Services area
- the Library's increased focus on providing consistent high quality customer service which meant that the nature of work in Lending services had changed.
- the Library's responsibility to address health and safety issues for staff who were constantly undertaking manual handling tasks .
- the need to have staff who were able to develop higher level technical skills across a range of functions to enable the Library to deal with the implications of electronic publishing trends
- the need to have staff who were able to work across a wide range of tasks to enable the Library to meet peak semester demands and open across long hours.

A decision was made to do away with the lower level classification and from the beginning of 2005 to reclassify all these staff to the higher level with a revised position description for all Lending Services staff. Supervisors are now conducting reviews of staff skills and implementing comprehensive training programs to ensure all staff have the skills to work across a broad range of tasks across the full opening hours of the Library.

Work has commenced in the Library's Library Resources Services [LRS] section to reconsider the skills required by staff in the section. This section, which had its origins as the technical services section, has undergone considerable change over the last five years in response to the move from the acquisition of print resources to electronic resources, particularly in the area of serials management.

As well, QUT Library has chosen to place responsibility for a range of new and emerging functions to LRS. These include:

- management of the acquisition of datasets from the Systems Branch to LRS
- processing incoming requests for material to be incorporated in the Course Materials Database (CMD)
- processing electronic versions of theses for entering in the Australian Digital Theses (ADT) national database.
- processing of submissions to the ePrints archive [to take place shortly]

- Maintenance of the WebBridge module of the Millennium system,

Although the staff in LRS have adapted and upgraded their skills to meet the needs the changing environment the point has been reached whereby some staff are being extended beyond the requirements of their existing position description, thus requiring a more planned and strategic approach to identification of skills required in the section as a whole and for specific functions and workflows.

Recruitment and selection

Whilst all of the above activities are important in ensuring that existing and new staff are able to work effectively to achieve Library goals in the short and long term, recruiting appropriately skilled new staff who will most likely be the future supervisors and managers is fundamental to the Library's ongoing organisational growth. Whitmell's report encouraged the Library to take a longer term view when employing new staff and to select staff much more on their potential than on their ability to be immediately effective in the position. Whitmell also encouraged the Library to seek to employ staff with a commitment to lifelong learning, who had leadership potential and who were flexible and adaptable.

In addition to Whitmell's advice, the Library's work in repositioning itself and reviewing services in order to be able to respond to the changing university environment and the changes in the way information services will delivered in the 21st century had identified the need for a comprehensive review of the position descriptions for many positions. Work in this area will commence in 2005 and will be informed by the work of ALIA and BCLIP described above as well as the Library's own Competencies Matrices and the outcomes of the LATN project also described above.

Equally as important as having the relevant position descriptions is the need to ensure that the selection process itself is effective. Whilst the Library must observe QUT policy in respect to recruitment and selection, work has commenced with the Human Resources Department to explore new techniques for selection such as, eg, work and psychological tests, involvement of peers on panels, cadetships for library students, weighting of responses to selection criteria, presentations within the interview or to selected staff groups. As well, the need to develop better interview skills in those staff who are on selection panels has been acknowledged and will be the subject of future training.

Conclusion

The library profession will see a huge wave of retirements over the next five to ten years. Many of the librarians retiring will be from the senior ranks of the profession. At the same time, the range of generic and discipline specific skills required by the profession to continue to deliver relevant services into the twenty first century varies from the skill set that many of the members of the current workforce are equipped with. There is a clear responsibility on the leaders of the profession to address this issue by defining the workforce profile relevant to their institution and to implement strategies to ensure that existing staff and new hires meet this profile.

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