

Sharing Practices and Actions for Making Best Use of Organizational Knowledge in Libraries

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Documenting and Sharing Managerial Wisdom

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Abstract:

Librarians manage information. How well do they manage their institutional knowledge, though? Knowledge management (KM) is a concept that is derived from business, though it has been found to be useful, and has been widely applied, in non-profit parlance and even librarianship. We frame the problem of library leadership transition within a KM context, focusing on public library management. A survey of libraries in Missouri (United States) reveals the current state of practice for library leadership transition in light of one KM framework. The results of this paper inform both our current knowledge of succession planning for Missouri libraries and the gaps that currently exist between the informal transfer of knowledge and a structured KM system. Finally, we discuss the Public Library Leadership program, designed to introduce LIS students to public library administration through a combination of educational and experiential learning opportunities, and we explore how the literature and the study might inform education for new public librarians, especially directors of small public libraries.

Keywords: knowledge management, mentoring, public libraries, administration, leadership

Introduction

Michael E. D. Koenig describes knowledge management (KM) as “[making] the organization's data and information available to the members of the organization through portals and with the use of content management systems” (Koenig, 2012). He articulates three main features of KM systems, including lessons learned databases, location of expertise, and developing communities of practice.

This paper focuses on the communication and KM of public library directors in one area of the United States. We begin with the premise that public library directors have complex jobs. Their duties combine managerial and leadership roles, with tasks as varied as creating and working with budgets, motivating staff, working with boards of directors, and navigating local politics. Smaller and rural library directors need many of the same skills as larger libraries. In the United States, rural libraries typically find it difficult to attract experienced library directors (Mehra, Black, and Shu-Yueh, 2010; Flatley and Wyman, 2009). Those experienced directors would have, as tacit knowledge, a ‘lessons learned’ database from their own experience, knowledge of the locations of expertise on various topics, and a community of practice of peers developed during their previous career journey.

When a public library director steps down and a new director is hired, how does the new person learn to do that job? Hartman and Delaney (2010) asked, “How can we identify and retain their departing expertise – the gold in the library’s intellectual vault?” (p. 36). They suggested that leaders reflect on special skills (e.g., programming, best practices, other expertise), knowledge (e.g., complex procedures, readers’ advisory, etc.), and connections (with, for instance, reporters, legislators, community organizations, donors) that they have developed yearly, but especially in their last 3 – 6 months of tenure. Directors (and, we would add, branch managers) have special knowledge that they need to pass along to create a smooth transition. This list of “gold” expertise echoes Koenig’s KM components of lessons learned database, expertise location, and community of practice.

Literature Review

Libraries and KM. Knowledge Management, or KM, is a concept that comes from business parlance. Koenig’s definition above is goal-neutral, but Teng and Hawamdeh (2002) provide the American Productivity Center’s (1999) definition of KM as “a conscious strategy of getting the right knowledge to the right people at the right time and helping people share and put information into action in ways that strive to improve organizational performance” (p. 188). The mission and goals of a for-profit business are different from the goals of a library, and KM practices between for-profit businesses and libraries will also differ. In the business world, knowledge might be akin to intellectual property or power, and that stance on KM can effectively reduce sharing. Libraries are focused on managing and sharing information to benefit patrons and other information users, including other librarians.

A review of the literature about library leadership and knowledge management found articles that focused on a wide variety of issues, including:

- Understanding users’ needs
- Competencies
- Intellectual capital
- Information culture or organizational culture
- Reorganization and innovation
- Team learning
- Decision-making
- Organizational structure and cooperation

Gillian Oliver (2008) notes that library-focused KM¹ often includes technological tools for storing and sharing information with employees, and this information technology enables organizational governance. This is a theme in the literature: it takes a technological infrastructure to effectively manage communications and records for effective decision-making. Nowhere is this more apparent than in library cooperatives and consortia. The integrated library system (ILS) itself holds a vast amount of data that can be used to facilitate knowledge. Xiaoi Ren (2013) describes how different library cooperatives use the ILS as a source of decision-making (i.e., services, policies, and management) because it holds statistical data and other important information.

Al Ansari and al Khadher (2011) emphasize that it is not only managing knowledge, it is also being able to act on one's knowledge, to take the initiative and be decisive, implement, manage time, and delegate. Communication, listening, understanding others' needs, and navigating organizational politics are all important leadership abilities related to decision making and getting tasks done. Properly managing and sharing information increases trust, and it should be driven by guidelines and documentation. Information management is a product of both structural and environmental factors.

Library Leadership

Leadership is, admittedly, a somewhat murkily defined buzzword. However, it is a useful starting point (and important to define) because the term is so often used in English-language library and information science (LIS) literature. Steven Bell (2013) said, "Open any book whose title claims it is about library leadership and you'll find chapters about human resources, strategic planning, budgeting, motivating staff, organizational structure and change, organizing teams, or any of the other myriad tasks associated with leadership" (para. 6).

We add to this empathy, emotional intelligence and diversity training, 'soft skills' that are equally as important for leadership but less likely to be included in standard management texts. These soft skills are especially important in today's "unpredictable environments [where] a creative approach to building flexibility, resilience and staff engagement has become essential for survival" (Macmillan, 2011, para. 1). Haycock (2011) found that exemplary branch managers are exemplary managers and leaders – meaning that they have the ability to motivate other people, create a harmonious work atmosphere and are sensitive communicators. They are team builders who know how to mentor and delegate to their staff, are flexible, approachable, and responsive to their communities and staff. Macmillan (2011), likewise, said that library leaders should adopt a "coach approach," meaning that they should build "positive connections between managers and staff" (2); they celebrate what goes right rather than ruminate over what has gone wrong. Leadership, in this sense, is essential for survival, and is inextricably linked with good communication practices.

Method

Our research questions were: (1) *How do librarians, and especially managers, use KM?*, and (2) *When a library director steps down and a new director is hired, how does the new person learn to do that job?* Related to these questions were other questions about whether KM is an

¹ Oliver prefers the term "information management" for library-focused KM, to avoid ideological overtones of corporate management. In this article we use the term "knowledge management" while simultaneously acknowledging the legitimacy of other terms used to describe similar processes.

appropriate tool for library leadership transitions and whether KM practices could be formally used in leadership education for LIS students.

To find an answer, we distributed an electronic survey composed of eleven questions to the Missouri Library Association membership listserv, reaching 597 subscribers. Six of the questions were about knowledge management, succession planning, and communication. The other four questions were demographic, asking about job title, type and size of library.

The survey was answered by 48 librarians, and we distilled results to look at specific populations (i.e., directors, managers, full-time employees, part-time employees).

Position Type	Public	Academic	Other	Total
Library Director	5	5	1	11
Library Departmental Manager	6	6	1	13
Full-Time Library Employee	5	12	3	20
Part-Time Library Employee	2	1	1	4
Total	18	24	6	48

We invited respondents to participate in an interview, and ten librarians agreed. Of these, five were upper-level management or directors, and four were from public libraries. All participants who were interviewed had significant experience working in librarianship; even those people who were fairly new to their position had worked for years in other positions.

In this paper, we emphasize the 24 library directors' and departmental managers' responses because of the emphasis on the study on leadership. Nonetheless, all employees have valuable insight into the knowledge management and communication in the organization. The variety of participants' work experience and longevity provided a basis for comparison, as well as different viewpoints on communication.

Findings

How did new directors or department managers learn how to do their job?

Survey results revealed that people learned to do their management-oriented jobs through four specific mechanisms: training themselves, working with a mentor, working through a structured transition, and turning to specific communities of practice for advice. Also mentioned as support structures for leadership development was formal education through the Master of Library and Information Science curriculum, workshops, conferences, and past experience. The interviews provided more in-depth views into how people learned their jobs.

Self-training. People who trained themselves indicated that they had more flexibility in choosing what to cover or emphasize, but very little guidance and few internal sources of support. Seven directors and department managers who answered our survey indicated that they were on their own as far as structured training, for reasons including previous

retirements and the lack of a specific orientation plan. One survey respondent commented that having to self-train “was not ideal, but it allowed me to redesign a new library space and create new services based on the user needs that I saw.” Another library had been without a director for six months. While their initial few weeks or months were not comfortable, some of the respondents who had to self-train said that they were able to figure out how to do their job and eventually made it their own.

Mentors. Mentors provide experience and a sounding board for new ideas; however, they are not always available. Of the directors and department managers who answered our survey, 13 (54%) said they did not have a mentor at all, 9 (38%) said they had an informal mentor, and only two (8%) had a formal mentor. One academic library director had a formal mentor. Three directors had an informal mentor, and seven had no mentor. Some mentors were trusted advisors; one person said that her mother had worked for years at the library and was able to provide information about the culture and history.

Transition Plans. Structured transition plans included the new director working with the previous director for a period of time before the previous director formally retires and specific checklists of actions and meetings that had to take place. This structured transition might provide more guidance at the expense of problem-solving experience, but the three directors and department managers who experienced a structured transition were positive about this method. One interviewee reported that she had an extremely successful learning experience with her mentor, the former director; the librarian had the foresight to step down from her position six months before she quit so that she could mentor her successor. The new director said that she is now incredibly prepared to take over the reins, and she highly recommended this method if it were feasible for both parties.

Communities of Practice. Finally, several directors and department managers noted formal and informal communities of practice that they turned to for advice and support. These communities included other directors and other branch managers, as well as formal groups. This indicates that it is not necessarily institutional knowledge, but knowledge about performing the job, that is helpful. Regardless of the size of the library, the larger community of librarians – whether through a professional organization such as ACRL’s New Director’s program or a consortium, provided a source of knowledge – a knowledge base that helped new library leaders learn their craft. In the survey, one director said that (s)he learned to do the new job by asking: “I wasn’t afraid to ask other library directors for help.” Interview participants elaborated on this theme often—for instance, “I entered the ACRL New Directors Program for mentoring. It has a confidential listserv that I can turn to if I’m stuck. It’s meant for small library directors.” Another explained, “There’s a big backup community with institutional knowledge about system implementation. Newer people might not know how something is done, but there are some people who have worked with the system for years – it’s a community with a good reference base that you can turn to with questions.”

Most survey respondents did not say that they had succession planning in their library. We learned from the survey that only five (10%) of our respondents were actively working on a succession plan; nine (19%) have a ‘vague’ succession plan, but the majority, 29 (62%), do not have a succession plan. Four (9%) said that they do not know. Of the directors who answered the survey, seven (64%) said that they did not have a succession plan. This may be because they are not planning to retire in the foreseeable future; succession planning is not necessarily a benchmark of good planning, but documentation about the job, duties, and procedures should be considered to be very important. One small library director explained:

“If I were in a library where we had 70 employees, it would be more important to have technology at my disposal – electronic newspapers, an internal Facebook, Twitter...but we’re so small, so at some point is it better to just tell everyone? Our procedures are so well documented that we don’t usually need a paper trail.”

What practices are used for communicating and sharing knowledge?

Directors and department managers reported on their systems of information sharing and how frequently those systems were used. The vast majority communicate by word-of-mouth, with other strategies used less frequently. The standard deviation for these numbers show the variance in the amount of time a method is used – for instance, policy manuals have the highest standard deviation, indicating higher variability in the use of policy manuals than in the use of, for instance, meetings.

System	Percent Use	Standard Deviation	Respondents
Word-of-mouth, meetings	73%	25.29	24
Policy manuals	46%	33.26	23
Spreadsheets or formal documentation	43%	30.09	22
Post-It Notes	22%	28.40	18

Interview respondents also talked about strategies for knowledge exchange. One librarian said that she had recently hired a new librarian (she works in a very small library) and that librarian had offered to create a new manual. They did not have one as of yet; they primarily use IM for communication because of the immediacy. Another librarian said, “It’s a small staff so we communicate really well...I think that the hardest part for me is a lack of communication that I get from the top administration. Crazy things happen up there and we don’t hear about them – big decisions coming from admin and that makes it hard for me to communicate with my staff.” Because her staff is so small, they communicate verbally, but email anything that they need documented or that needs a paper trail.

Thirteen respondents (57%) indicated that they felt they were effective at communicating information across the library, ten (43%) said they were not as effective in sharing as they would like to be, and none of the directors and department heads felt that managers in their organization were hoarding knowledge. We note, however, that five non-managers did feel their management hoarded organizational knowledge. The interviews were very helpful in explaining some of this. For instance, one director said, “A big part of my job is to communicate up and down; sometimes communicating down can be – especially if you’re involved in a process that is in the early stages and ongoing, you might not be able to talk about it too much, but people seldom think to say that it’s time to start talking about it. How to keep staff feeling informed before it’s time to open something up publicly.” If something is coming down the pipeline but it’s not ready for public consumption, it might stay at the administration level for a while, which might be perceived negatively by non-administrators.

Technologies are a potential driving force in knowledge management, and offer scope for exploring new ways of sharing information. Every librarian we talked to was using an ILS, which they would have used for learning about user needs and management of their system. Cataloguing practices and system knowledge came up in several interviews. Similarly,

several of our interviewees discussed a problem with deciding which technologies to use to store and communicate information with the staff, especially if they are part of a larger organization. For instance, one librarian said that they have found a great solution to communicating problems within the library: they bought a ticketing system and it is working very well. “Everything goes in there. Unless you mark it as private, anyone can see it, and watch it, or provide input.” That library, though, is a member of a larger institution which uses different communication systems. The ticketing system increased transparency within the library level, but was a source of conflict at the institutional level. Another common source of conflict or confusion was about which cloud system to use (for instance: Box, Google Drive, or OneDrive?). Three of the interview participants referred to their organization as a Google or Microsoft organization, meaning that all of their communication took place through that system. Smaller libraries, though, were much more flexible. Several, in fact, said that they did not use any system at all; they had a written manual that might be stored on a shared drive so that everyone could access it, but most communication took place in person.

Discussion

Our driving research question was, *when a library director steps down and a new director is hired, how does the new person learn to do that job?* We describe many of the specific practices above. However, there is no real consensus regarding the best way to learn how to do the job of library leadership, and a new library leader may benefit from combining all the methods discussed: seeking mentors, seeking communities of practice, following a structured transition plan, and directing one’s own training. Many of our directors and department managers noted an extensive support network they could draw upon. Librarians have multiple support networks: local, in their consortium, in the state, and national.

Although there was no clear consensus about the best way to train for a new directorship or leadership role, there does seem to be space to design a KM system to coordinate leadership development. The ACRL College Library Director Mentoring Program has already developed some of this space: they have created a community of practice for college library directors, a structured seminar to provide case studies and exercises to help new directors develop their database of lessons learned, and they have identified and located expertise on the specific topic of college library directorship. The Public Library Association’s Certified Public Library Administrator program is also exploring this territory. They have developed a standard knowledge base for public library administration, and their program has created a network of graduates who serve as a community of practice. These programs do not formally acknowledge themselves as knowledge management systems, though, and they work across the field rather than for the benefit of one particular institution.

How the PuLL Program Builds Leaders by Tapping into KM Principles

Koenig clarifies that KM seeks knowledge outside the organization as well as inside. “Increasingly KM is seen as ideally encompassing the whole bandwidth of information and knowledge likely to be useful to an organization, including knowledge external to the organization—knowledge emanating from vendors, suppliers, customers, etc.” (Koenig, 2012). The problem of attracting directors to small public libraries and the overview of KM practices drove the development of the Public Library Leadership (PuLL) program at the University of Missouri, which aims to give library students skills, competencies, and knowledge to enter leadership positions, as well as providing them with a network of

mentors. This was envisioned as a way to help them work effectively in leadership roles in small and rural public libraries, even without the knowledge they would have gained in a career spanning several years.

Formal education components include three classes in public library administration, diversity for leadership, and a service-learning course that requires the students to work with a community organization. The classes cover both practical knowledge and training, soft skills development, and mentoring by public library directors or higher-level staff members. The program culminates with a practicum experience focused on public library administration and management.

Students build their tacit lessons learned database through Missouri public library directors sharing their experiences in “Problems and Solutions” videos. The public library directors discuss a problem or challenge faced by their library and how they resolved that problem. Students are asked to watch the first half of the video, the problem, and then brainstorm solutions, comparing their solution to the one chosen by the library director. Other course assignments use a case-based method in which students face managerial issues and have to work as a group to identify stakeholders and desired outcomes.

The PuLL Program has identified experts in the LIS field, and those experts are accessible to the students. Of the seven large library directors in Missouri, six sit on the PuLL program board of advisors. Additionally, students are paired with a library director mentor who guides the student through several assignments in the program and a semester-long practicum that focuses on library management. Moreover, students often attend the Missouri Public Library Directors’ meetings, which happen twice annually. This helps our students develop a community of practice they can access when they take on directorship roles.

For educators who are potentially graduating students who might take jobs as small library directors, our findings emphasize the importance of helping the students establish networks, mentors, and experiences. They need to be ‘plugged in’ to a variety of groups and take advantage of as many professional development opportunities as possible so that they know where they can turn to when they get a job. In other words, technological solutions are important, but possibly not as important as knowing where to turn to for help.

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