The Blind Man Describes the Elephant: The Scope and Development of the 8Rs Canadian Library Human Resource Study

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Abstract

The 8Rs Canadian Library Human Resource Study was prompted by anecdotal report that projected a future shortage of Canadian library workers. It represents a groundbreaking collection of data that examines institutional and individual perspectives on the eight key variables defined as fundamental to understanding human resources in Canadian libraries: recruitment, retirement, retention, remuneration, repatriation, rejuvenation, reaccreditation, and restructuring. The research methodology included a survey of over 450 library employers and 2,200 librarians and nearly 2,000 paraprofessionals, in-depth telephone interviews, and focus groups conducted with library administrators. The data analysis from the three-year project resulted in the release of *The Future of Human Resources in Canadian Libraries* (2005). It also prompted the Canadian Library Association to form a President's Council to define projects based upon the research and culminated in a National Human Resources Summit in October 2008. The Summit brought together over one hundred invited participants to strategize and collaborate on action planning directed to the dynamic and shifting human resource environment and capacity in Canadian libraries.

Introduction

An educated and skilled workforce is at the core of effective library and information services, and this workforce will be key to the industry's ability to respond to challenges posed by the rapidly changing knowledge-based economy. Over the previous generation, we have seen that greater demands and opportunities have been placed upon information profes-

sionals in all sectors as knowledge, technology, and innovation have acted upon all segments of our society and economy. The ability of institutions to recruit, retain, and develop a committed and skilled workforce will determine their relevance to their users and stakeholders.

What, then, of the predictions made in the late 1990s and early 2000s that the library sector would experience a severe supply shortage of professional librarians? Stanley Wilder's seminal works (1999, 2002) on the age demographics of academic librarians served as research-based alert for human resources professionals in academic libraries. Wilder (1999) based his predictions of the rapidly graying North American librarian workforce on Association of Research Libraries (ARL) statistics, noting the median age of forty-six for librarians in this sector; librarians' age profile was older than that of other professions, as well as that of the North American workforce as a whole.

The findings prompted the University of Alberta Libraries to examine the demographics of its professional librarian cohort, showing local results that supported Wilder's own predictions. The ensuing discussion resulted in the creation of a small research group to conduct a literature review to determine what published research or statistical evidence (for example, through available microdata files from Statistics Canada's Labour Force Survey) could give any further information on the situation. There was little found; in fact, a study by the federal government body Statistics Canada (2000) noted that there appeared to be "a dearth of statistics examining the way the [library] sector is changing" (p. 83).

The original question that guided the literature review was therefore a simple one: will there be a shortage of librarians in Canada? Very little recent research had been conducted on this specific topic; some discussion of the issue was published, but based primarily on anecdotal evidence. The literature did, however, raise a number of other questions regarding demand and supply within the library industry. The question grew into several subquestions, and the research team developed a proposal regarding a number of factors:

- Recruitment, to both the profession and to particular institutions
- Retention, or the length of librarians' tenure within the industry as well as to an individual institution or position
- Retirement, to make some kind of prediction, grounded in research, regarding the size of the workforce over the next five to ten years
- Reaccreditation, speaking to issues of entry-level library education (the master of library and information studies)
- Rejuvenation, concerning issues of midcareer professional renewal
- Repatriation, based upon a concern that Canadian librarians were leaving Canada for the more promising American job market
- Remuneration, in order to measure the extrinsic benefits of the profession

- Restructuring, regarding the ways in which library institutions might reorganize their staffing cohorts in order to deal with anticipated shortages, limited financial resources, and/or emerging technologies

These factors became known as the 8Rs.

The group began to work with Tandem Social Research Consulting, which had in its own team expertise regarding labor force studies. The expanded 8Rs Research Team conducted interviews with seventeen administrators of all types of libraries and focus groups with administrators, librarians, and library technicians. These qualitative methods guided the development and scope of the survey instruments: two in-depth surveys of library institutions and of library staff (both librarians and paraprofessionals). The survey instruments are available at http://www.ls.ualberta .ca/8rs/home.html.

The research methods involved three major stages, with each consecutive stage designed to inform the directions and content of subsequent stages. Stage I entailed a literature review; a compilation of existing Statistics Canada and library school graduate data; in-depth interviews with seventeen library administrators; and focus group sessions with representatives from the Canadian Association of Research Libraries (CARL), the Canadian Urban Libraries Council (CULC), and the Alberta Association of Library Technicians (AALT).

Stage II of the 8Rs project involved the completion by library management from academic, public, and special library systems of a paper and pencil survey mailed in the summer of 2003. Of the 1,357 surveys randomly distributed, 461 were completed for a response rate of 34 percent. The 63 percent of institutions that employed professional librarians together represented 3,300 librarians.

Stage III, a Web survey of professional librarians and paraprofessional staff conducted in the summer of 2004, was the largest and most comprehensive stage of the research project. The focus was to gain an understanding of the 8Rs from the viewpoints of those who work in libraries. Both random and nonrandom sampling strategies were used. Of the 8,626 potential respondents randomly selected from the sampling frame, 3,148 librarians and paraprofessional staff participated in the survey for a response rate of 37 percent. When adding the 1,545 nonrandom respondents to the sample, the respondents totaled 4,693.

Major Findings

The major report, *The Future of Human Resources in Canadian Libraries*, was published freely online (Canadian Library Human Resource Study, 2005) with print copies available for purchase through the Canadian Library Association. Many of the statistics presented in the 275-page report are shown not only for the respondents overall, but broken down by library

sector and subsector (institutional study), and by librarians and parapro-fessionals and career stage (individual study). This report attempts to tease out the finer differences between categories of respondents, and in many cases, was extremely illuminating about the 8Rs for the researchers and the Canadian library community.

While not all major findings can be shown in this paper, what follows is a summary of those findings that have generated further work in the library community after the study's publication.

Demographics
One-quarter of librarians and one-fifth of paraprofessionals are fifty-five years of age or older (compared to one-tenth among all Canadian work-ers). At the same time, over half (54 percent) of librarians can be clas-sified as "senior professionals," having worked in their careers for more than fifteen years. Just under half (44 percent) of paraprofessionals can be classified the same. The profession's gender and racial profile does not reflect the larger society, being female-dominated, and underrepre-senting visible minority and Aboriginal staff as compared to the Canadian workforce as a whole. Approximately half of Canada's library workforce is employed in a research library (a member of the Canadian Association of Research Libraries, or CARL) or a large urban public library (a member of the Canadian Urban Libraries Council, or CULC, formerly known as the Canadian Association of Library Urban Public Libraries).

Management and Leadership
A majority (six of ten) professional librarians work in a supervisory or managerial role, while a notable minority (three of ten) of paraprofes-sionals also work in these roles.

Recruitment to the Profession
Librarians were asked what attracted them initially to the profession; most-frequently cited answers included

• the core values of librarianship, including an appreciation of books, learning, and research, and
• an interest in serving the public good.

These interests were often spurred through knowledge of libraries and librarians, suggesting that personal connection to the field is a positive influence on recruitment. No respondents spoke of an interest in man-agement or supervision in this human-resources-intensive field.

While three in ten paraprofessionals indicated an interest in obtaining a master's degree, most noted they had not pursued the degree due to the limited access to master's programs. Canada currently has seven schools of library and information studies—six anglophone and one francophone, with a bilingual program opening in Ottawa. All of these programs are

located in urban centers, and are sited in five provinces, meaning that students must often relocate in order to attend. There are no distance programs in Canada; in the focus groups and interviews, administrators noted that while online programs are available through American institutions, international tuition fees were prohibitive for many Canadians. Additionally, interviewees from the public library sector placed importance on a Canadian-specific context for entry-level education. Therefore, one potential solution to the accessibility of MLIS education would be to create a distance degree for Canadians.

Organizational Recruitment

In 2002, almost half of libraries did not note an increased need to recruit staff, and had not recruited recently, compared to their situation in 1997. Few (23 percent) institutional respondents stated they had a "poor" ability to recruit, their reasons being primarily budget restraints. CARL libraries had fewer barriers and higher levels of recruitment within librarianship; conversely, CULC libraries had a much more difficult time recruiting, citing the large research and academic libraries as their primary competitor for the "best and the brightest." With respect to competencies, virtually all types of libraries in the Canadian system are finding it the most difficult to fill their human resource needs in the areas of leadership, management, and technology and to find candidates who are flexible, innovative, and able to handle a heavy workload.

Recent librarian recruits (those who have been working in their careers for less than six years) were most likely to apply for their first jobs at academic libraries, followed by special, and lastly, public libraries; this finding echoes the difficulty noted by CULC institutions in their recruitment activities.

As librarianship is a NAFTA-approved profession, the research team wished to understand the impact of the job market south of the Canadian border; three of ten new librarian respondents applied to a non-Canadian university for their first job, due to a perceived shortage of jobs in their home country. This suggests the influence of the larger market in the United States upon Canadian professionals; an outstanding question would be the extent to which the Canadian market influences American librarians' career choices.

Retirement

Between 1997 and 2002, the majority (79 percent) of librarians retired before the age of sixty-five. When employing the most likely age of retirement (sixty-two years of age), 16 percent (1,440) of the current professional librarian labor force are predicted to retire over the five year period between 2004 and 2009. A somewhat larger proportion of retirements are predicted to occur between 2009 and 2014 at 23 percent (2,070), for a total predicted retirement rate of 39 percent (3,510) between 2004 and

2014. However, since the librarian age profile is highly concentrated in an older demographic (e.g., nearly half are currently fifty years of age and older), these predictions are highly dependent upon age of retirement. Predicted rates of retirement among paraprofessional staff are slightly lower: 13 percent between 2005 and 2009 and 21 percent between 2009 and 2014, for a total ten-year retirement rate of 34 percent.

Succession management is not simply about numbers, however. The experience, skills, talents, and knowledge lost by the retiring librarians and paraprofessionals present a compounded situation. If, for example, paraprofessionals are viewed as a possible pool of future professional librarians, the paraprofessional workforce will be subject to further losses, which, as the retirement data suggest, the library community can ill afford. Together then, these results suggest that the library community needs to focus more strongly on attracting potential staff to the field in both professional and paraprofessional capacities.

Overall, only three in ten senior librarians are looking forward to retirement to a "great extent" while most (56 percent) reported "to some extent." Furthermore, large proportions of librarians indicated that they would consider both delaying their retirement (75 percent) and accepting an early retirement plan (68 percent), suggesting that retirement timing can be influenced by organizational policies and practices. The strongest determinant of time of retirement for librarians is their financial ability to do so. The same retirement attitudes were found among senior paraprofessional staff.

Libraries experienced greater difficulties replacing the leadership qualities lost when librarians retired than they did replacing their technical skills and knowledge. Anticipated future concern is also slightly greater for leadership replacement than for skills and knowledge; 46 percent of libraries reported that their current pool of suitable internal candidates is inadequate to replace the leadership abilities lost as senior librarians depart, compared to 40 percent of libraries responding similarly with respect to skills and knowledge. These statistics underscore the need to groom the next generation of leaders and managers sooner, rather than later, with a focus on not only midcareer librarians, but on recent entrants into the profession.

Six of ten libraries cite the following barriers to ensuring important competencies are maintained in their staffing cohort: budget restraints, inadequate leadership or management training within the organization, the absence of a succession plan, an inadequate pool of qualified candidates, an inadequate pool of interested candidates, and the inability to fast track strong candidates.

However, librarians' interests match well with the needs of libraries today. Of the new professional respondents, 57 percent indicated an interest in working in a more responsible position, 50 percent reported

that they would like to see themselves working in a management position within the next ten years, and 65 percent agreed that their job provides opportunities for advancement.

Library Education

Three-quarters of library administrators agreed with the statement "the education provided in MLIS programs equips graduates with the competencies required to be professional librarians in your organization," but only 64 percent of recent librarian recruits indicated that they were satisfied with the overall quality of the education they received in their master's program. Results from both survey groups, however, suggest that greater curricular emphasis should be placed on management, leadership, and business skills and that more opportunities should be provided to engage in hands-on practical experience (e.g., through practicum and internship programs).

Evaluations of library technician programs by recent paraprofessional recruits were much more positive, with 81 percent expressing satisfaction with the overall quality of their education. Furthermore, 81 percent of recent library technician recruits (compared to 63 percent of professional librarians) agreed that their program provided them with the general skills and abilities required to perform their jobs, and 71 percent (compared to 46 percent of professional librarians) responded similarly with respect to the provision of information technology skills. This may speak to several factors: the ability of college programs to respond more quickly to the industry or good communication between the college programs and library technician employers, for example.

Professional Development

The majority (72 percent) of library administrators believe that new professionals require the most amount of training of all their staff, but only 56 percent of new professionals stated they receive sufficient opportunities to participate in training. Moreover, training in management, leadership, and business for all librarians was found to be the most lacking, especially in light of the organizational need for librarians to perform such roles. The positive results of participating in leadership programs like the Northern Exposure to Leadership (NEL) Institute suggest that additional nonorganizational initiatives should be considered by the library community. Overall, 60 percent of all librarians believe they have adequate opportunities to participate in training, and only 44 percent of paraprofessional respondents agree with that statement.

Satisfaction and Benefits

Job satisfaction in the field is very high; eight in ten librarians and paraprofessionals indicated they were "satisfied" or "very satisfied" with their current job. Interestingly, satisfaction is especially high among manage-

ment, which provides administrators with a positive statistic for promoting management work to potential librarians or new recruits.

On average, all full-time librarians earned a median income of $60,000 per year. Seventy-two percent of librarians felt they earned a "fair" salary. Earning a median income of $37,500 per year, paraprofessionals make about sixty-three cents for every dollar made by professional librarians, and 61 percent of paraprofessionals felt they earned a "fair" salary. Most libraries are able to offer a wide range of benefits to their librarians. Four in five professional librarians agreed that they receive "adequate" benefits.

Few work reform schemes are offered within library settings. Examples of these types of programs are job enlargement, job enrichment, quality circles, and participative management, and practicing them can result in increased productivity and job satisfaction. Problem-solving teams are practiced by half of the libraries, and most prevalently so in the CARL and CULC sectors (81 percent and 65 percent, respectively). But job enrichment, job sharing, or job rotation are practiced by only a minority of libraries.

Individual survey results about workloads and stress were the least favorable of all intrinsic benefits analyzed in this study. Only two in five librarians indicated that their workloads are manageable, and one-quarter agreed that they have little work-related stress. Considerably more (62 percent) reported that they are provided with the opportunity to balance work and family/personal life in their jobs. Finally, a multivariate causal analysis of job satisfaction revealed that the two single most important contributing factors to job satisfaction for both professionals and paraprofessionals are that they are treated with respect by their superiors and that they work in a job that allows them to grow and learn new skills. With regard to respectful treatment, these results are not surprising given that virtually all (98 percent) of the librarians and paraprofessionals in our study indicated that it is important to them that they are treated with respect by their superiors. Comparatively, however, only 77 percent of librarians and 75 percent of paraprofessionals agreed that they perceive this respect from their superiors.

Numerical Librarian Demand-Supply Match
Shrinking or flatlined budgets resulted in staff contraction during the 1990s in Canadian libraries. However, the new millennium suggested that this trend was reversing; the 2002 growth rate in the librarian workforce equaled three percentage points, with research libraries and large urban public libraries experiencing the most growth. Three-quarters of all libraries in the institutional sample experienced, at least to some extent, an increased demand for more professional librarians in the past five years, and 77 percent also indicated that their demand for librarians will continue to increase over the next five years. However, the current downturn

in the global economy will likely impact administrators' predictions of position increase. Clearly, cycles of growth and contraction cannot be predicted with confidence, which further complicates workforce planning.

Nevertheless, factoring in the number of master's program graduates and the number of predicted retirements, we estimated that by 2009 the library system will be working with 98 percent of the current size of the librarian workforce. Using the same formula, however, by the year 2014 the workforce size will reduce to 89 percent of what it is currently. With the supply decreasing at the same time as demand increases, the long-term future situation for the Canadian library sector is one of a librarian shortage.

We must offer some caveats with this conclusion: we are less confident in long-term predictions, given the number of factors in libraries and in the larger society that may impact demand or supply of librarians. These factors can include limited budgets (cited as a recruitment barrier by institutions in 2003), as well as restructuring efforts of libraries (whether based on changes in staff roles or external budget limitations).

Discussion

Study results repeatedly demonstrated the need for librarians to assume managerial, business, and leadership roles:

- Three in every five professional librarians work in management positions.
- Seventy-one percent of library administrators reported management skills as an important competency to look for when hiring, and 76 percent felt the same way about leadership potential.
- Eighty-six percent of library administrators indicated that there has been an increased need for librarians to perform more managerial functions in the past five years, and 85 percent felt this need would continue to increase over the next five years.
- Eighty-nine percent of library administrators indicated that there has been an increased need for librarians to perform more leadership roles in the past five years, and 88 percent felt this need would continue to increase over the next five years.
- Fifty-six percent of midcareer and senior librarians in all sectors agreed that compared to five years ago, they are currently performing more management functions, 60 percent felt they are now assuming more of a leadership role, and 38 percent felt they are now performing more business functions.

Viewing these statistics in light of the results previously discussed, we conclude that managerial skills and leadership potential are two of the most important competencies, but are also the most difficult to find in employees. Leadership skills were more difficult to replace than general

skills and knowledge when senior librarians retired, and administrators expressed even greater concern over the ability to replace leadership skills in the future. Both institutions and recent librarian graduates stated there is a need to place more emphasis on management-type skills in the master's education curriculum. Within the organization, some of these skills are being addressed through training, but leadership training is not provided as frequently as it could be. Moreover, librarians themselves feel that for them to move into higher-level positions they especially need training in management, leadership, and business skills.

Further analyses of the interest among librarians in performing these roles and in participating in management, leadership, and business training suggest that the demand-supply match in these skills is better for leadership and business skills than it is for management. Although the current and predicted future demand is high for librarians to perform managerial functions, and six in ten librarians are currently working as managers or supervisors, only 44 percent of librarians indicated that it is important that they are able to manage a service or department, and even fewer (36 percent) provided the same response for supervising others.

There are indications that the future situation will be more positive. Most recent librarian entrants do not feel that it is important for them to manage or supervise at this point in their short careers, but they are interested in participating in management skills training and have expectations to perform managerial roles in the future. Further, the high satisfaction levels of librarian managers could act as an incentive to those considering management in their careers.

Our rating of the demand-supply match for leadership skills is somewhat more promising. Again, juxtaposed against a very high current and predicted future demand, the interest among the majority of librarians at all stages of their careers in assuming leadership roles is apparent. Sixty-two percent expressed an interest in performing a leadership role in general, 64 percent an interest in the specific role of motivating others, and 74 percent in seeking out new project opportunities.

Several recommendations arise from these findings. First, the library community would be well-advised to begin investigating their institutional demographics, and planning for the future (for example, by restructuring staff positions or grooming current staff to assume the managerial and leadership roles of departing senior staff). The results of this study also revealed that the current workforce is open to assuming leadership roles and, indeed, tends to find these roles to be interesting, challenging, and rewarding.

An increased demand for managers and leaders has implications for recruitment of individuals to the profession. Efforts to attract individuals to the profession should not only highlight the literacy, learning, and public service values of librarianship, but also the fact that most librarian

jobs will eventually involve some form of supervising and managing. Library educators should place greater emphasis on management, business, and leadership skills.

Community Response: Human Resources Summit

Almost from the beginning of the study, a major objective of the 8Rs Research Team had been to find ways of promoting and disseminating the results of the study to the library community. Before the final results of the research were released in mid-June 2005, the 8Rs Research Team recommended that the Canadian Library Association form a group to examine the results of the research and discuss how they might be used to strategically inform and improve human resource planning in Canadian libraries. At the beginning of May 2005, then CLA President Stephen Abram appointed the President's Council on the 8Rs, consisting of former CLA President Wendy Newman as chair and over thirty member librarians from across Canada and from all regions and types of libraries. The mandate of the President's Council was to examine the research and build awareness of the findings as well as suggest potential strategies and best practices that could be used by libraries engaged in human resource planning and management. Over the next two years, the President's Council established several working groups with defined projects and delivered a number of reports focusing upon broad and cross-sectoral issues such as recruitment, mentorship, availability of internships and practicum programs, and access to library education and professional development.

In discussions between the President's Council and the 8Rs Research Team, a critical adjunct to the research and work of the council was voiced: how to institute a dialogue that would build a national infrastructure of support for strategic actions and activities on both a sectoral and cross-sectoral basis. Finally, it was decided that a National Summit, one that would involve other Canadian library associations, was the best vehicle to initiate such a dialogue, and a Steering Committee with broad representation from the various associations was formed to organize the National Summit on Library Human Resources.

The summit was designed with a specific outcome in mind: to identify the strategies and key actions required over the next five to six years to move toward the goal of ensuring an adequate supply of well-educated, well-trained librarians and information professionals to meet Canada's knowledge and information management needs in the first three decades of the twenty-first century. Over a hundred librarians and library leaders from all sectors of Canada's library industry were invited for a two-day summit that took place in Ottawa, Ontario, on October 6-7, 2008. The structure of the summit allowed for invited speakers but also dedicated the majority of the first day to facilitated break-out groups that identified promising strategies and then shared them in plenary sessions. On the

second day, break-out groups convened again to discuss implementing the strategies, including desired outcomes, key actions, and identification of potential leaders of or contributors to the strategies. The latter part of the second day focused upon how the library community could move forward in a collaborative and coordinated way, and association leaders were asked to present their ideas and strategies in plenary sessions. An innovative aspect of the summit was the inclusion of seven bloggers, new professionals who had been invited to attend the event, record the proceedings, and blog about them after the course of the summit.

In May 2009, the Canadian Library Association will again be convening a meeting of association leaders to assess the progress that has been made since the summit and ensure that there is a resolve to continue the dialogue and collaboration necessary to meet the goal of a national strategy and action agenda for human resource planning for Canada's libraries.

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