

**8Rs REDUX**

**CARL LIBRARIES HUMAN RESOURCES**

**STUDY**

For

**CANADIAN ASSOCIATION OF RESEARCH LIBRARIES  
(CARL)**

By



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# EXECUTIVE SUMMARY: SUMMARY OF MAJOR FINDINGS & CONCLUSIONS AND STRATEGIC HUMAN RESOURCE PLANNING IMPLICATIONS

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## Overall Summary Statement

Retirements, alongside the hiring of younger librarians and the restructuring of some roles and the attrition of others, have resulted in a noteworthy turnover of CARL library staff and a slightly larger and younger librarian workforce. Many librarians are learning new tasks in challenging and interesting roles that increasingly encompass specialized skills and that engender comparatively high levels of job satisfaction.

## INTRODUCTION

The original 8Rs Canadian Library Human Resources Study conducted in 2003-2004 arose in response to a growing perception in the community that libraries would be facing mass retirements within the next 5 to 15 years. In contemplating the breadth of retirements and in conducting preliminary conversations with the Canadian library community, it quickly became evident that a host of other important human resources-related questions had also never been studied in Canada. The resulting report *The Future of Human Resources in Canadian Libraries* was widely disseminated. Since this was the first time that human resources issues were so thoroughly and widely examined across Canada, these data were always intended to be used as a baseline from which future research would be compared. The current collection of longitudinal data, the *8Rs Redux* for CARL Libraries has thus enabled a quantitative mapping (within a 10-year timeframe) of the many ways in which CARL libraries and their staffing requirements have changed, as well as how they have responded to changes in their operating environments. As was the case in the original 8Rs, a large portion of the findings pertain to librarians and results about paraprofessionals continue to be part of the analysis. Additionally, we conduct a more fulsome examination of *other* professionals.

As was the case for the original study, *8Rs Redux* involved the collection of a very large amount of data (more than 630 variables), and given the over-time comparisons, the analysis involved almost twice as many variables. What follows is a presentation of some of the most salient findings and their human resources planning implications. References are provided to the relevant tables and figures located in the full report. The full *8Rs Redux* report can be accessed at <http://www.ls.ualberta.ca/8rs/home.html>.

## RESEARCH METHODS

The research methods used in the current *Redux* study are largely a replication of those utilized in the original 8Rs study. The central components of both studies are surveys of CARL libraries (referred to as the Institutional Survey) and of CARL member library staff (referred to as the Practitioner Survey). The original Institutional Survey data represent the year 2003 and the current data 2013; however, the original Practitioner Survey was conducted in 2004 and the current survey in 2014.

## STAFF CHARACTERISTICS

### Summary of Major Findings & Conclusions

Although librarians currently comprise a slightly smaller share of CARL's professional and paraprofessional staffing complement than they did in 2003 (down from 56% to 52%; Figure 5), their overall numbers increased by 3% (Table 21). *Other* professionals now comprise a slightly larger share of all staff (up from 9% to 14%) and grew by 72% (Table 21).

Librarians are twice as likely to be members of visible minorities than 10 years ago (11% compared to 5%; Figure 8), and they continue to be predominantly female (comprising about 7 in 10 librarians; Figure 6). The gender profile of *other* professionals, however, has shifted from being predominantly female in 2003 (51%) to predominantly male in 2013 (56%).

The librarian workforce is younger now than it was in 2003 (Figure 10), due to the hiring of new and presumably younger recruits, as well as the retirement of more senior librarian staff. On average, however, all types of staff are still older than the Canadian workforce (20% of whom are over the age of 55, compared to 30% of librarians, 25% of *other* professionals, and 39% of support staff; Figure 9).

Compared to 2004, librarians, especially female librarians, are less likely to be working in middle management (down from 27% to 18%; Table 3), a finding that partly reflects the elimination of these positions as librarians retire or as their positions are not renewed due to budget restraints. Evidence to this effect is provided in Table 12 where it is noted that nearly one-third of retiring librarian positions were not replaced. Given the growth in the number of *other* professionals, and the additional finding that nearly 50% of retired librarian positions were replaced with external candidates (Table 12), it may also be possible that the reduction in middle management is partly due to a shift in some of these positions from within the ranks of librarians to within the ranks of other professionals. Since just 7% of *other* professionals were hired into restructured positions (Table 24), however, this would account for only a very small number of lost librarian middle-management positions.

In contrast, whereas in 2004 male librarians were more likely than female librarians to be working in senior administrator positions (22% compared to 12%), gender parity is now observed (15% of both male and female librarians are senior administrators; Table 3).

## **Strategic Human Resources Planning Implications**

- The CARL workforce has become more diverse: there has been an influx of younger professionals (both librarians and *other* professionals), growth in the number of *other* professionals, and growth in the number of new staff who represent visible minorities. Care must be taken to assess the development requirements of newer staff and CARL organizational cultures and structures must be open and receptive to their presence and their needs.
- Much of the cohort of newer librarians is still clustered at a non-management career stage. Their career aspirations need to be ascertained and appropriate development and training provided as these librarians will likely continue to be the face of CARL librarianship for the next thirty to forty years.
- While middle-management positions have decreased over the last ten years, there is some indication that a greater proportion of male than female librarians has reached middle-management levels in terms of career stage. CARL institutions need to assess interest in, and potential for, performing in management and leadership roles and ensure that opportunity for advancement is provided on an equitable basis.

## **ORGANIZATIONAL CONTEXT OF CHANGE**

### **Summary of Major Findings & Conclusions**

A noteworthy shift has occurred in what is perceived as the most important human resource challenge. CARL libraries now view the broader issue of dealing with the persistent pressures of workforce development rather than retirements as the most important issue requiring attention.

Retirements are just one of several sources of organizational and human resource change and they do not have nearly the same impact on how librarian roles are changing as do new technologies and new services (Table 6). It is perhaps for this reason that CARL libraries, which have already had a significant portion of their workforce leave due to retirements (Table 15), no longer view this aspect of human resources to be as critical as it once was. Though many libraries had already experienced some level of retirements by 2003, the community concern at that time over the prospect of a swell of retirements perhaps surpassed the actual experience of retirements that has occurred in the past 10 years. Having already dealt with a degree of retirements while concurrently managing numerous other human resource challenges resulted in the relegation of retirements down the list of competing concerns. Thus, it is not that having to deal with retirements is no longer an issue for CARL libraries, but only that it is no longer the primary issue of concern.

Several indicators suggest that budgets are playing an increasingly limiting role in achieving the most pressing human resources issue of developing a skilled workforce. Not only are budgets considered to be a barrier to change by the vast majority of libraries (91%; Table 7),

but they are increasingly viewed as a barrier to recruitment (up from 64% to 77%; Table 9) and to providing promotional opportunities to librarians (up from 56% to 79%).

### **Strategic Human Resources Planning Implications**

- CARL libraries have experienced sustained organizational change and this is most likely to continue given declining or stagnant budgets, new technologies and capacities, and the overall changing environment of postsecondary education. Somewhat paradoxically, strategies for dealing with, or capitalizing on, the challenge of developing a skilled workforce under these changing conditions have remained relatively constant over the past 10 years (Table 5). Some barriers, such as budgets or collective agreements, may prove intractable or difficult to change over the next 10 years, but barriers such as organizational culture and employee resistance to change can be addressed when organizations endeavor to work with staff on these issues. The literature on organizational change and development provides evidence that principles of organizational development (OD) can be used within higher education to address the underlying causes of organizational problems while still maintaining commitment to academic excellence. For a case study and one such example, see Ruben, 2005.

## **RECRUITMENT**

### **Summary of Major Findings & Conclusion**

The majority of libraries have a good or excellent ability to recruit, roughly the same as in 2003 (Table 8). Reduced ability to recruit, such that it exists, is primarily due to budgets (Table 9). Indicators also suggest that, from the supply side perspective, the job market for recent MLIS graduates does not significantly depart from that of the 2004 recent graduates (Figure 16). In broad terms, therefore, recruitment of librarians appears to be supporting the development of a skilled and flexible workforce. Chapter 8 examines the extent to which supply meets the demand for specific competencies through recruitment.

### **Strategic Human Resources Planning Implications**

- As in 2004, CARL libraries are not experiencing much difficulty in recruiting qualified applicants, with budgets serving as a key limiting factor in recruitment. However, given limited budget resources, deciding which positions to recruit into and whether these positions are best filled by librarians, *other* professionals, or support staff, will continue to be major questions in CARL recruitment. The necessity for clear definitions of roles and responsibilities and for understanding the emerging needs of CARL library organizations will also persist and remain a focus of recruitment activity.
- Observable gains in staffing diversity have been made by CARL libraries, particularly in employment of staff who are visible minorities. However, attention cannot be diverted away from increasing the diversity of the CARL workforce and equity plans continue to be important. Some CARL employers have instituted scholarships and internships for

aboriginal students; these are a progressive and enlightened response to increasing the number of aboriginal candidates for library positions. Equal attention should be paid to disabled individuals who are qualified and available for work. The increasing prevalence of on-line education options in Canadian MLIS and other post-secondary programs may also help to strengthen the numbers of applicants identified in Canada's employment equity legislation and enlarging the pools of candidates for jobs in CARL libraries.

## RETIREMENT

### Summary of Major Findings & Conclusions

Minor differences were observed between the future retirement rates of librarians, *other* professionals, and paraprofessionals. This finding does not change the dominant story that despite a lack of formal succession planning (Table 18), CARL libraries have been dealing with retirements somewhat successfully in the past decade (Tables 13 and 14) and there is no reason to believe that they won't continue to do so in the future. At the same time, CARL libraries are well advised to consider the compound effects from the retirement of both professionals and paraprofessionals on the competency supply of their workforce, and the repercussions on the community's leadership from the departure of senior administrators, the largest group of departing librarians.

Overall, the study revealed that retirements are not inherently problematic and, in fact, are not a problem for the majority of CARL libraries since librarians do not appear to be (Table 11) and are not predicted to be (Table 16) retiring at alarming rates. As the typical age of retirement increases, the likelihood of having to deal with sudden peaks in retirements decreases. As well, some vacated positions have been restructured into introductory positions, giving the library an opportunity to inject newer and younger talent into their workforce. Even if retired positions are not restructured, replacement from outside the library can be an opportunity to effectively manage instances of resistance to change (Table 7). Retirement of librarians appears to be more of a problem when it involves replacing the knowledge and skills associated with managerial and leadership competencies held by senior administrative positions (Table 13). Such skill shortages are especially of concern given the higher predicted retirement rates among middle management and senior administrators (Table 17).

The question is not if retirements are a problem, therefore, but under what circumstances they are a problem. The absence of formal succession-planning strategies (Table 18) specifically designed to target and groom upcoming managers and leaders is one such circumstance that warrants attention among CARL libraries. In addition further investigation into proven and viable succession planning practices for senior administrative positions should be considered.

Lastly, the youthful profile of CARL librarians not only signals a healthy rate of hiring, but since this hiring coincided with a shift in librarian skill demand it must also indicate that the community has already been capitalizing on the opportunity that retirements bring. In other



words, to some extent retirements have allowed the CARL community to address the most pressing human resources issue of developing a workforce that possesses high demand skills.

### **Strategic Human Resources Planning Implications**

- Retirements have occurred gradually within the CARL population and to a large extent retirements have fuelled the recruitment of a new generation of the CARL library workforce. Retirements are predicted to continue at a similar pace to that experienced over the past decade and will continue to offer opportunity for renewal.
- As post-MLIS leadership and management training is deemed inadequate to replace competencies lost by retiring librarians (Table 14), CARL organizations must more closely define what this means and how to fill the vacuum left by retiring librarians. Entry-level to senior leadership institutes are more commonly offered in the USA and Canadian librarians can take advantage of them; however, it may also be timely to open a discussion of what CARL as a collective might do to enhance leadership and management competencies in the younger cohorts of CARL librarians.
- Is succession planning a viable human resources planning mechanism for CARL libraries? While formally practiced by a few, it does not seem to be a primary mechanism for replacing the management and leadership skills of senior retirees. However, as CARL libraries are practicing many elements of succession planning, it may be more feasible for libraries to examine these practices (Table 18) and to invest in or develop practices around the elements that work for their particular circumstances. This may be especially important for practices that focus on the succession of management and leadership competencies.
- The younger age profile of CARL librarians has implications for developing human resource management strategies that might be better aligned with the wants, needs, and sensibilities of younger populations. It is becoming a truism that younger workers seek more balanced and meaningful work than they may have observed in their parents' generation, but this premise should be more closely scrutinized along with greater understanding of what this means within library organizations. Recent Canadian research has found, in fact, that the reverse is true with respect to meaningful work and that generation Y and baby boomers are more alike in their work values than they are different (Lowe, 2014). This may also be important as collective agreements are renegotiated for a younger population of workers.

## PROFESSIONAL AND PARAPROFESSIONAL POPULATION AND ROLE CHANGE

### Summary of Major Findings & Conclusions

Since the total number of CARL employees decreased by 7% and all professional and paraprofessional staff increased by 11% (Table 21), we can deduce that the total population decline in the past 10 years was due to reductions in non-paraprofessional support staff. *Other* professionals increased at the greatest rate, but by only 6 percentage points as a proportion of all staff, and increases did not occur at all libraries. Increases in the population of *other* professionals were found to be a result of creating new positions much more so than they were from restructuring existing positions (57% compared to 7%; Table 24). As might be expected, many of these new positions were in IT, but the data show that *other* professionals are performing a wide range of roles in CARL libraries among which IT, communications, and copyright professionals are growing the most noticeably (Table 26). More importantly, many of these new *other* professional positions have similar titles to newly-created librarian positions (Appendix Table 5). The conclusion is that while librarians continue to predominantly hold jobs in public services, and *other* professionals dominate IT jobs, these two professional staff groups are increasingly fulfilling many of the same functional needs of CARL libraries, needs which progressively require specialized skills (Table 30).

The results suggest also suggest that the expansion of non-MLIS professionals is a small trend in CARL libraries, but one that will likely continue. Given the wide range of roles played by *other* professionals and given that the reasons for hiring *other* professionals rests upon a similarly wide range of causes, predictions about their future rate of growth are beyond the scope of the *8Rs Redux* data, but should continue to be followed.

It is not within the scope of this report to weigh in on whether the increase in *other* professionals is a positive or negative change; however, to the extent that the increase is in response to emerging needs of the library that might otherwise be left unfilled, one must conclude that the influx is filling a functional role. Wilder (2007b) aptly captures the benefits and challenges associated with this trend in the following quote:

[T]he nature of scholarship and higher education has changed in ways that present academic libraries with challenges that did not exist 20 years ago and libraries deserve credit for finding the creativity and resources to meet those challenges quickly and effectively . . . [Yet, he adds] As the size and influence of the non-traditional professionals grow . . . administrators would do well to think about the traditional expertise in their ranks--expertise that, in many respects, responds to timeless values that lie at the heart of our profession. (p5)

The evidence of a continued shift in paraprofessionals performing librarian roles is also not strong (Table 29), despite that the vast majority of institutional respondents indicated that role shift had occurred and would continue to occur (Table 28). Indeed, the stability in tasks across time for both librarians and paraprofessionals is somewhat unexpected and suggests that perhaps the bulk of the change resulting from new technology occurred before 2004. Alternatively, the inability to detect change may be a function of the level of detail in the

description of the tasks themselves. Thus, though the same proportion of librarians in 2003 and 2013 are performing reference, information services, and research support to faculty and students (66%; Table 29), the ways in which these tasks are being performed has changed. To the extent that new technologies are informing nearly everything that is done in the library, change is thus best measured in terms of "how" and not "what." CARL itself notes that

"The essential role of the CARL librarian has not changed. Regardless of his or her specific position, the librarian's central mandate continues to be bringing information seekers and information sources together." (Core Competencies of the 21<sup>st</sup> Century: CARL librarians, p4).

The stability of over-time findings presented in Table 29 thus serves as a reminder that while there are new ways of doing the same thing and, even though the scholarly environment for doing so has changed dramatically, the core role of librarians remains unchanged, as does that of their paraprofessional counterparts.

### **Strategic Human Resources Planning Implications**

- The composition of the CARL workforce should continue to be monitored as there is evidence of shifts in numbers of librarians, *other* professionals, and support staff, and some continuing evidence of role change, without a clear picture of whether these are significant or long term trends.
- The numbers of support staff in CARL libraries has decreased and this trend is likely to continue as support staff retire and are not replaced. As a result, the role of support staff needs to be examined within CARL libraries and their support skills and competencies assessed and defined for the future.
- Paraprofessionals continue to provide a valuable role in CARL libraries and there continues to be a fair degree of role overlap with librarian colleagues. CARL libraries should continue to assess the needs of the organization and level of job responsibility with the object of creating or re-aligning positions that are challenging for paraprofessionals and professionals alike and acknowledge their distinct but complementary skills sets.
- There do not seem to be highly differentiated roles for *other* professionals in CARL libraries; they perform a broad range of roles and functions, and as noted, the numbers of *other* professionals continues to increase in almost all of the identified job classifications. It may be that *other* professionals provide specialized or emergent skill sets throughout these broad classifications; however, new librarian positions and new *other* professional positions both exhibit a large amount of overlap. Further work should be done to understand emerging roles in CARL libraries and the ideal educational background in recruitment.

## **LIBRARIAN COMPETENCIES AND COMPETENCY CHANGE**

### **Summary of Major Findings & Conclusions**

On the whole, CARL librarians are expected to possess a wide cross-section of both soft and hard skills (Table 30), most of which are not difficult to find in the pools of candidates applying for librarian positions (Table 31). With respect to the former, CARL recruiters are finding it much less difficult than they did in 2004 to find candidates with the ability to flexibly adapt to change and who are also innovative, both of which are soft competencies that have been said to characterize the 21<sup>st</sup>-Century Librarian. This change thus marks a considerable shift in the supply of competencies brought to the workplace by librarians.

Otherwise, of all the changes presented in this chapter, the increased need for librarians to perform a wide array of typically high-tech and specialist roles is perhaps the most indicative of what the 21<sup>st</sup>-Century librarian looks like. If the skill sets required to perform roles such as bibliometrics, e-learning, digitization, and GIS are not typically acquired in library schools, the onus is placed primarily on the library itself to ensure staff are adequately trained. The intersection of the demand for specialized and IT skills demonstrates the importance of on-the-job training, a challenge that CARL libraries have been largely meeting with success. Of all the competencies examined, librarians are most likely to be interested in practicing IT skills, as well as most likely to be interested in and to have participated in IT training (Tables 32 and 33). Effective IT training that has been provided to librarians, combined with the fact that IT has now been part of the academic library for nearly two decades, seems to have increased IT skill sets to the extent that senior librarians are now just as likely as recent graduates to show interest in using (Table 32) and furthering their IT skills (Tables 33).

In fact, the results overall have demonstrated the importance of ongoing training for the development of a skilled workforce, not just for IT or for specialist roles, but also for conducting research and for performing leadership, managerial, and business roles. On-the-job training is especially required for inculcating the talents and sensibilities typical of performing leadership roles insofar as they are arguably difficult to teach in the classroom setting of the library school. Though there is evidence to suggest that there is still room for library schools to enhance curriculum dedicated to management and research skills (Table 38), the gap between librarian interest in continuing their education in these competencies and their participation in such education (Table 37) also suggests there is room to enhance the opportunities and organizational support for such on-the-job training. These findings should be interpreted within the context of an overall improved match between the demand for and supply of leadership and management skills since 2004 (Tables 30 and 31).

### **Strategic Human Resources Planning Implications**

- Competencies continue to change within CARL libraries. Both library schools and library organizations have a role to play in defining the changing knowledge base for the

profession as well as ensuring that needed skills are developed or re-developed in the light of emerging needs. On-going discussions with library schools and participation on school advisory committees and with ALA accreditation committees, will help ensure that CARL libraries and schools maintain a common understanding of the changing competencies for research libraries.

- The importance of specialized skill sets within CARL libraries is clearly indicated by institutional respondents, with libraries reporting needs over a broad spectrum, and many but not all libraries experiencing difficulty filling these needs through recruitment. CARL libraries thus need to assess their current and on-going training initiatives in light of the demand for specialized skill sets and on-going needs for leadership, management and research skills.
- The need for a wide range of specialist skills across almost all CARL libraries, should also provide the catalyst for focused discussions on the ways in which CARL libraries might share expertise and encourage those in specialist roles to train and mentor others across the breadth of CARL libraries. Collaborative and peer-led initiatives, such as the CARL Research Institute, should also be encouraged among CARL libraries. Given the cost of travel for on-site training, alternative delivery mechanisms, such as Webinars or access to live events via video, should also be considered.

## **EDUCATION AND TRAINING**

### **Summary of Major Findings & Conclusions**

When comparing changes in the three possible routes that CARL staff can acquire the skills and abilities needed for them to effectively perform their jobs in the 21<sup>st</sup>-Century research library (formal education, training, experiential learning), most noticeable is the increase that has occurred in their formal education. With 37% of 2014 librarians having earned two graduate degrees and 3% earning three graduate degrees (compared to 28% and 1%, respectively, in 2004) and 71% of 2014 paraprofessionals earning an undergraduate or graduate degree (compared to 60% in 2004), it is clear that CARL library staff are making an important contribution to their development (Table 44).

Recent ratings by graduates of how well MLIS programs provide generalist skills are favourable, and their evaluations of the individual competencies learnt in the program have increased between 2004 and 2014. Hovering around 50%, however, their overall evaluation of the quality of education is the same as it was in 2004 (Table 46). Though we have seen slight improvements in the evaluation of management, leadership, and business skills taught in MLIS programs, a good share of both recent graduates (22%; Table 47) and institutional representatives (35%; results not presented in table or figure) targeted these skills as areas that need improvement. Of even greater importance to recent graduates, however, is the need to link MLIS programs more closely to the practice (Table 47). This finding could explain the

consistency in overall ratings of MLIS programs, especially given that just 37% of recent graduates agreed that the program provided them with a realistic depiction of what it is like to work as an academic librarian. Presumably, a "realistic depiction" is more readily conveyed experientially than in the classroom. The interest in learning about the profession from a firsthand perspective is understandable, but it highlights the tension between maintaining librarianship as a profession while at the same time ensuring that the two years in graduate school adequately prepare students for the academic library labour market.

Ten years have elapsed since the 8Rs first revealed that libraries need their staff to receive more education in management, business, and leadership; and almost as much time has passed since the 8Rs Training Gaps Analysis made the explicit recommendation for library schools to increase their curriculum content in management and leadership. The results of the *8Rs Redux* suggest that, though respondents see improvement, library schools still need to examine more fully this documented need. A more definitive conclusion would entail a closer examination of library school curricula changes over the past decade; however, the conclusions of the 8Rs Training Gaps Analysis conducted in 2006 revealed that most deans and directors of Canadian library schools recognized the importance of managerial and leadership skills to libraries, though there were diverging opinions about the appropriateness of inculcating management and especially leadership skills in the classroom. Current debate continues to focus upon whether leadership skills are appropriately taught in library school programs or left to the workplace (Phillips, 2014).

Training is not just about equipping staff with the skills and abilities needed for their current positions, but it is also about preparing them for changes in their current position and for more responsible, higher level, or simply different positions. The finding that 1 in 5 librarians and paraprofessionals do not feel adequately equipped to perform their job effectively (Table 50), combined with the fact that a larger proportion of staff are interested in engaging in training than have actually done so (Table 51), suggests that while training is adequate for some staff, important training gaps are evident for others. It thus behooves CARL libraries to better assess the training needs of their staff on a continuing basis. As it stands, while performance evaluations are conducted in about 70% of libraries, just 2 in 5 reported that they routinely assess the training needs of their librarians, and even fewer (9%) evaluate the effectiveness of such training. At the same time, 86% of institutional respondents reported that their library promotes a culture of lifelong learning.

### **Strategic Human Resources Planning Implications**

- Understanding that roles in Canadian research libraries are changing and will continue to evolve, and that library organizations will continue to define competencies associated with new and changing roles, education and training of all library staff will continue to be critical determinants in the success of CARL libraries as they support change and adaptation as well as learning and growth. Recruitment can also provide for new roles and identified competencies, but this is not always possible given the budget picture facing many CARL Libraries. As recommended in 2004, both practitioners and institutions must commit to education and training as an ongoing necessity.

- CARL libraries must also develop mechanisms to assess the on-going training and development needs of their library staff on a continuing basis. Admittedly, this is not an easy task as these needs are variable across individuals and can be different depending upon career stage. Training and development needs must also be assessed in light of the needs of the entire organization. This raises two burning questions: How do practitioner interests and needs align with the interests and needs of the organization? And, where should practitioners and institutions spend their often scant resources of time and money? CARL libraries must clearly communicate their directions and set training and development agendas congruent with these directions. Training and development programs must also be evaluated to see if they are indeed effectively addressing staff and organizational needs.
- There is a seeming lack of congruence between the institutional perspective that many training opportunities are available and the perspective of practitioners that there are gaps between their interest in specific types of training and whether they have had the opportunity to participate in such training (especially for leadership development and research skills training, but not for IT skills). Perhaps at least a partial answer lies in advising libraries to be very clear about the connection between needed competencies and the training and development programs that are being offered. If there are staff interests that will not be met because of other institutional priorities for training and development, staff can then elect to fulfill their interests through outside training opportunities. Of course, libraries will also want to pay close attention to staff interests, as these may be driven by emerging needs that are not necessarily easily or readily identified as an institutional priority.

## QUALITY OF WORK AND JOB SATISFACTION

### Summary of Major Findings & Conclusions

Overall, the findings suggest that most aspects of work that are important to staff and that contribute to their job satisfaction are adequately provided. Not only are the majority of librarians, *other* professionals, and paraprofessionals satisfied (Table 52), but they are in agreement about liking the challenging, interesting, creative, varied, public service, autonomous and respectful relationship aspects of their jobs (Figure 26). It has also been found that, although staff are not as interested in promotion as they are in growth and skill development (Table 53), the opportunities for career advancement are more limited and may therefore influence interest (Table 57). Furthermore, budget restrictions appear to be a more limiting factor for promotional opportunities than they are for training to enhance skills (Table 56).

The chapter findings add to an accumulating body of evidence suggesting that professional and paraprofessional staff are rising to the challenge, or at the very least are interested in rising to the challenge of finding new, better, or more creative ways of accomplishing the same tasks or

new tasks. Many practitioners wrote about this very challenge when describing the job aspects they most liked (Figure 26). By way of illustration, below is a very small sample of such sentiments expressed by librarians:

We are working in a time of transformational change and it is challenging, exciting, and rewarding to be leading the change process.

The variety of work, the international scope and ability to participate and lead the use of technologies in an academic setting.

The challenge of designing new systems and solving old problems. Always learning new technical skills and being able to apply my design talents without too much committee oversight. Knowing that my work is used by a lot of users.

Very dynamic and changing; new perspectives on the profession and practice demonstrated by new librarians who interpret their roles broadly; enjoy complexity of the changing roles of librarians (ambiguity and all!).

The diversity of activities, the range of opportunities, working in a changing field in the vanguard of new librarianship, and my awesome colleagues.

Having said this, not all types of staff are equally satisfied, nor do all jobs involve the same aspects that are important and that impact job satisfaction.

Paraprofessionals, in particular, warrant a more fulsome summary of their results. To begin, as was the case in 2004, paraprofessionals are slightly less satisfied with their jobs overall than librarians and *other* professionals (76% satisfied compared to 80% of librarians and 88% of *other* professionals; Table 52). While growth and skill development are just as important determinants of job satisfaction for paraprofessionals as they are for professionals (Table 69), they are less likely to be working in jobs with such opportunities, and they are twice as likely to report disliking the routine and repetitive aspects of their jobs that represent skill underutilization (Figure 27). Indeed, some of the job elements that are especially important to paraprofessionals are, coincidentally, the least likely to be part of their jobs. For example, paraprofessionals are generally more concerned with their job security, yet they are the least likely to be working in a job that they are certain will continue (53% compared to 64% of librarians and 65% of *other* professionals). Alternatively, paraprofessional staff are the most likely to be working in jobs that allow them to achieve work-life balance (Table 59), and they are also the most likely to view this element of work as important. Paraprofessionals are, moreover, the most likely to indicate that they have manageable workloads (68% compared to 45% of librarians and 52% of *other* professionals; Table 59). In contrast, the more challenging and varied nature of librarian jobs appear to come with the price of lower levels of workload manageability and work-life balance. Of final note, are the lower levels of career advancement and decision-making opportunities afforded to paraprofessionals (Table 64).

In addition to being slightly more concerned about the erosion of librarianship as a profession (Table 70), mid-career librarians were found to also be slightly less satisfied with their jobs overall than they were in 2004 (from 83% down to 78%; Table 52). While a causal analysis is beyond the scope of this project, we can speculate that part of the reason for the decrease in



satisfaction is due to the findings that mid-career librarians report that they are also more likely to now perform more routine work than they were 5 years ago (from 18% up to 25%; Table 60); and that compared to 2004, they are less likely to report that they are treated with respect by their superiors (from 77% down to 69%) and that they have good relationships with administration (from 76% down to 63%)(Table 65).

### **Strategic Human Resources Planning Implications**

- CARL libraries are at an important juncture in their evolution. The changing post-secondary environment of research, teaching, and scholarly communication and dissemination is triggering the development of new roles for staff, and therefore, opportunities to work and contribute in ways that many staff view as exciting, challenging, and satisfying. The challenge for CARL institutions will be to manage these changes in ways that allow staff to maintain their high rates of job satisfaction and also to ameliorate the aspects of organizational life that lead to dissatisfaction and reluctance to change. Continuous attention should be paid to employee engagement and the various indicators of job satisfaction that may influence engagement.
- Mid-career librarians are the least likely to report that their accomplishments are recognized and that their jobs are more rewarding and enjoyable compared to 5 years ago. It would be useful to consider these findings within individual organizational contexts. Many mid-career librarians should be considering senior leadership positions within CARL libraries. Given that retention rates suggest they will work within their organizations for another few decades, their engagement and participation is crucial to the continuing success of CARL libraries.
- The importance of good and respectful workplace relationships is apparent and is common among all staff groups within CARL libraries. Strategies for reinforcing or growing the strength of these relationships should continue to be at the fore of all CARL workforce planning.

# CHAPTER 1: INTRODUCTION

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The original 8Rs Canadian Library Human Resources Study conducted in 2003 and 2004 arose in response to a growing perception in the community that libraries would be facing mass retirements within the next 5 to 15 years. Beyond anecdotal evidence, however, much was unclear about the extent of retirements and also about how libraries were planning to handle the replacement of senior staff or the restructuring of their positions given the broader context of shifting staff roles, an ever-evolving framework of new technologies, and budget limitations.

In contemplating the breadth of retirements and in conducting preliminary conversations with the Canadian library community, it quickly became evident that a host of other important human resources-related questions had also never been studied in Canada. In response, an ambitious research agenda was developed around the 8 core elements seen as fundamental to understanding human resources in Canadian libraries: retirement, recruitment, retention, remuneration, repatriation, rejuvenation, reaccreditation, and restructuring.

The original 8Rs study took place over two years (2003 – 2004) and involved literature reviews, focus group sessions and in-depth interviews with library heads, and lengthy surveys of library institutions and library practitioners across academic, public, and special library sectors. The results of the study were presented to the community in a 275-page report: *The Future of Human Resources in Canadian Libraries* (2005).<sup>1</sup> Since this was the first time that human resources issues were so thoroughly and widely examined across Canada, these data were always intended to be used as a baseline from which future research would be compared. The current collection of longitudinal data has thus enabled a quantitative mapping (within a 10-year timeframe) of the many ways in which CARL libraries and their staffing requirements have changed, as well as how they have responded to changes in their operating environments.

Much has happened in the past decade that has had an impact on CARL library human resources. The slow recovery from the 2008 recession has meant that external pressures have continued to escalate with many CARL libraries facing the perennial challenge of either 'doing more with less' or eliminating programs and services altogether. Internal drivers of change within CARL libraries such as an ever-expanding array of technology, an increasingly diverse stakeholder body, changes to scholarly communication and publishing, and the need to deal with retirements over a sustained period of time, have required libraries and their staff to respond with a good measure of adaptability and flexibility.

Indeed, in some ways the 8Rs Redux might be better viewed as a study of human resource changes more so than as a study of the discrete human resource elements of recruitment, retirement, retention, and so on. Change is examined in terms of observed differences

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<sup>1</sup> The 8Rs Team also conducted a study on behalf of the Cultural Human Resources Council of Canada. "Training Gaps Analysis: Librarians and Library Technicians" (2006). More recently 8Rs published a monograph of research papers utilizing the 8Rs data called "The Future is Now: Responses to the Canadian Library Human Resources Study" (2012).

between the results of the original and Redux studies, but change is also a focus of the 8Rs Redux study in and of itself as reflected by survey questions asking respondents to comment on changes. The former comparative analyses of changes made over time contribute to the evidence-building process by replicating the majority of questions on both the institutional and practitioner surveys, and thus, both types of analyses permit the identification of trends and changes.

Of course, a major difference between the two studies is that the 8Rs Redux findings are examined by type of staff, career stage of librarians, and year of study for CARL libraries whereas library sector formed the main unit of analysis for the original 8Rs. As was also the case in the original 8Rs, a large portion of the findings pertain to librarians and results about paraprofessionals continue to be part of the analysis. Additionally, we conduct a more fulsome examination of *other* professionals.

Compared to the original 8Rs, moreover, analysis of the 8Rs Redux data has taken us in the direction of determining the extent to which the characteristics of the workforce are meeting the skills demands of the 21<sup>st</sup>-Century academic library more so than about gauging whether the workforce size will meet the demands of the Canadian research library as was the case for the original 8Rs. In other words, 8Rs Redux is more concerned with the composition and characteristics of CARL library staff rather than the quantity. That said, Chapter 6 includes a numerical examination of past and future retirements; and Chapter 7 includes an analysis of population change among librarians, other professionals, support staff (and paraprofessionals) that has broad implications for the shifting needs of CARL libraries.

As was the case for the original study, 8Rs Redux involved the collection of a very large amount of data (more than 630 variables), and given the over-time comparisons, the analysis involved almost twice as many variables. What follows represents the culmination of more than two years of research and reflects an examination and presentation of virtually all the data in as meaningful way as possible within practical limitations. Much else could be done with the data and we are hopeful that others take up the opportunity to further analyze this extensive and rich set of variables.

Most of the results are presented in the main body of the report in a series of tables and figures. Supplementary tables are presented in Appendix C and are referred to in the report when applicable. Each chapter concludes with a summary of the key findings and implied human resources strategies. We begin with a presentation of the research methods used in the 8Rs Redux.

## CHAPTER 2: RESEARCH METHODS

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### Introduction

The research methods used in the current Redux study are largely a replication of those utilized in the original 8Rs study.<sup>2</sup> The central components of both studies are surveys of CARL libraries (referred to throughout the report as the Institutional Survey) and of CARL staff (referred to as the Practitioner Survey). The original Institutional Survey data represent the year 2003 and the current data 2013; however, the original Practitioner Survey was conducted in 2004 and the current survey in 2014. Hence, across-time comparisons between respective survey results are as follows:

- 2003 Institutional Survey results are compared to the 2013 Institutional Survey results
- 2004 Practitioner Survey results are compared to the 2014 Practitioner Survey results

As is the case with most study replications, changes have been made to improve the reliability and applicability of results. One such change was the expansion of data collected on *other* professionals. While we are able to make 2003 to 2013 comparisons between most of the institutional data on *other* professionals, an insufficient number of *other* professionals responding to the 2004 Practitioner Survey prohibit comparisons of 2014 results with the original results. In addition, both the Institutional and Practitioner surveys *were* expanded to include the broader category of support staff (which includes paraprofessionals) for the current 8Rs Redux. Thus, 8Rs Redux encompasses a broader scope of staff that includes all professionals, paraprofessionals, and to a certain extent, *other* support staff. However, since most data for the original study is limited to that which pertains to librarians and paraprofessionals, across time comparisons between results are similarly limited to these two staff categories. The exception to this is that *other* professional data are compared for their population and demographic characteristics. For all data presented throughout the report, the type of staff for which the findings are provided is specified in the table or figure and the data source is listed below.

Otherwise, given the importance of making comparisons between the results of the Redux and original 8Rs research, further detailed differences in the research methods are noted below.

### Literature Review

To better inform the survey revisions and to contextualize the findings from a contemporary perspective, the literature review conducted in the original study was updated. This literature is presented periodically to aid in interpretation of the findings.

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<sup>2</sup> As was the case for the original 8Rs study, the 8Rs Redux Study received ethics approval from the University of Alberta.

## **Survey Instrument Modifications**

Both the Institutional and Practitioner Surveys underwent extensive review to determine whether questions should be changed, added, or removed from the instrument. To permit a comparative analysis of over-time changes and to contribute to the evidence-building process through replication, emphasis was placed on ensuring that the majority of questions on both instruments were replicated (please see Appendix A and B for copies of the Institutional and Practitioner Surveys, respectively).

Still, changes were made when it was determined that they would result in an improvement to the data that outweighed the loss of comparability between the current and original study. In other instances, questions were added to garner more detailed lines of inquiry, thereby permitting an iterative building of knowledge that goes beyond mere replication. Given that the original 8Rs was the first study of its kind in Canada, the survey instruments were lengthy. In an attempt to reduce respondent burden, therefore, a small number of questions that were determined to yield incomplete or inaccurate information were removed altogether and others were changed from open-ended to close-ended choice formats.

## **Institutional Surveys Distribution and Response Rates**

The institutional surveys were designed to collect information on the human resource experiences of CARL libraries from the organizational perspective. The Institutional Survey was originally gathered via pen-and-paper; however, the decision was made to allocate a large number of amenable questions to a web survey to enable easier completion and to streamline the post-survey stages (e.g., automatic data entry and coding for the web survey). The remaining questions about staffing complement numbers remained as a pen and paper survey largely due to the need for respondents to complete them over an extended length of time.

In September of 2013, the staffing complement portion of the Institutional Survey instrument was emailed to CARL libraries who were asked to provide staff numbers in full-time equivalent (FTE) as of July 1, 2013. The last completed survey was received in March 2014. The 6-month and somewhat lengthy time taken to complete the survey was largely due to the extensive nature of the data requested.

In December of 2013, the link to the web portion of the Institutional Survey was distributed. While most surveys were completed much earlier, final submission of the surveys was received in March 2014. Extensive follow-up phone calls and emails were made to encourage participation in both surveys.

Table 1 presents the response rates for both Institutional Surveys and demonstrates that despite the difficulties associated with completing the staffing complement component, a very respectable response rate of 90% was received, representing 26 of 29 CARL research libraries.<sup>3</sup> At 86%, the response rate for the web survey portion also permits confidence in the

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<sup>3</sup> Excludes two national libraries (LAC and CISTI) that were not able to participate.

generalizability to CARL libraries. These overall rates compare favourably to the 2003 response rate of 90%, though some caution is required when generalizing the results representing Quebec libraries where we see a response rate of 67% for both portions of the Institutional Survey.

**Table 1: CARL Institutional Surveys Response Rates by Region**

Region	All CARL Libraries <sup>1</sup>	Staffing Complement <sup>2</sup>	Web Survey <sup>3</sup>
	N	Response Rate	N
<b>Canada</b>	29	26 <b>90%</b>	24 <b>86%</b>
<b>West</b>	8	8 <b>100%</b>	6 <b>75%</b>
<b>Ontario</b>	12	11 <b>92%</b>	9 <b>75%</b>
<b>Quebec</b>	6	4 <b>67%</b>	4 <b>67%</b>
<b>Maritimes</b>	3	3 <b>100%</b>	3 <b>100%</b>

<sup>1</sup> Excludes two national libraries (LAC and CISTI) that were not able to participate. These two libraries, which participated in the 2003 study, were removed from the 2003 data and are henceforth excluded from all calculations and analyses.

<sup>2</sup> Includes partial responses for 1 library.

<sup>3</sup> Includes partial responses for 2 libraries that also did not include region, thus explaining why the column adds up to 22 instead of 24.

## Practitioner Survey Distribution and Response Rates

While the Institutional Survey instruments provided important information on staffing numbers, human resource practices and policies, and views from the organizational perspective, the Practitioner Survey offers a critical experiential view of the 8Rs from the perspective of those working in CARL libraries in various occupational capacities and career stages.

As was the case in the original 8Rs, the Practitioner Survey was delivered online. In 2004, however, extensive resources were devoted to developing exhaustive and accurate sampling frames of librarians and paraprofessionals from which a stratified random sample was selected. Given that CARL libraries could have as much as a 40% turnover in their professional librarian and paraprofessional staff since the original sampling frames were developed, updating the sampling frame would have been an equally resource-intensive endeavor that was beyond the means of the current study. It was, therefore, decided that the survey be distributed by each library through its own listserv system. Thus, a major difference between the original and current Practitioner Survey was that the former was a probability sample while the current was a non-probability sample.

The link to the practitioner survey was distributed to the identified contact (usually a human resources head) at each participating library on March 13, 2014 with a completion date of April 17, 2014. After emailing two reminders, a total of 837 individuals completed the Practitioner

Survey for an overall response rate of 24% (Table 2). Keeping in the mind the aforementioned differences in the 2004 and 2014 Practitioner Survey sampling methodologies, this compares to a sample size of 1,041 and a response rate of 42% in 2004.

At a respectable 36%, the response rate for librarians is the highest of all types of staff, followed by paraprofessionals at 33%. Response rates for *other* professionals (21%) and all support staff (17%) are adequate.

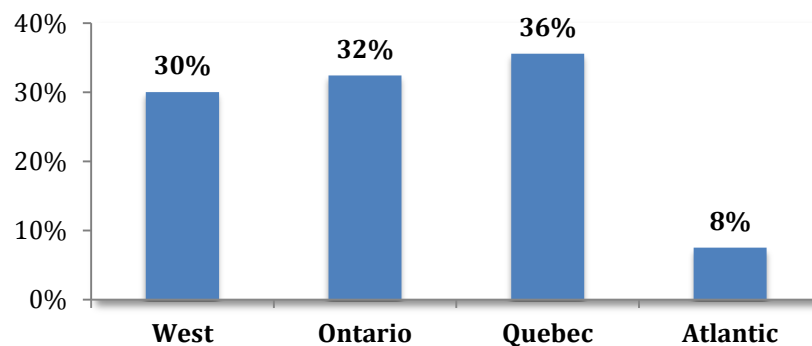
**Table 2: CARL Practitioner Response Rates by Staff Type**

	Response	Population Parameters <sup>1</sup>	Response Rate
<b>Total</b>	<b>837</b>	<b>3,564</b>	<b>24%</b>
Librarians	402	1,125	36%
<i>Other</i> Professionals	62	300	21%
Total Support Staff	373	2,154	17%
Paraprofessionals	301	908	33%

<sup>1</sup> Population parameters are from the Staffing Complement portion of the 8Rs 2013 Institutional Survey and therefore only include population data for the 26 libraries responding to that survey.

As shown in Figure 1, among the 333 librarian respondents for which region information is available, Atlantic Canada is notable for having a very low response rate of 8%. As a result, great care must be taken when generalizing the results from the Practitioner Survey to these librarians.

**Figure 1: Librarian Response Rates By Region**  
(n=333<sup>1</sup>)



Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Excludes 69 cases for which region is not known.

## Research Limitations and Cautions

We are confident that the overall findings can be applied to the CARL library community; however, as already mentioned care needs to be taken when generalizing the Practitioner results to Atlantic Canada and when generalizing the Institutional results to Quebec.

Our confidence in the results of the Practitioner Survey also rests on the fact that there are a relatively large number of respondents and especially librarian and paraprofessional respondents. Given that the current Practitioner sample was drawn using a non-probability technique for which we are unable to calculate error estimates, sample characteristics were compared to those that are known in the population to determine the extent to which the sample resembles the population (see Appendix Tables 1, 2, and 3 for sample characteristics and Figures 6, 7, and 9 for population characteristics). These comparisons reveal that librarians responding to the Practitioner sample are slightly more likely to be female (80% versus 69%) and disabled (3% versus 1%), less likely to be a visible minority (6% compared to 11%), and are slightly younger (9% versus 16% over the age of 60). A comparison of over-time change in the age distribution of the Institutional and Practitioner data reveals, however, a similar pattern of increasing less than 45 year olds and decreasing 45 to 55 year olds (Figure 10 and Figure 20). Furthermore, compared to the population parameters, the sample of Practitioners is comprised of a larger share of librarians (48% compared to 30%) and a smaller share of support staff (45% compared to 62%). With 7% of the Practitioner sample comprised of *other* professionals, it is very similar to the 8% share of *other* professionals in the population of CARL library staff. It should be understood that these differences in distributions between the practitioner sample and population parameters only bear on the representativeness of the total practitioner sample and not on results for individual types of library staff. Total results for the practitioner survey would thus over-represent librarian staff and under-represent the results for support staff. Other than the aforementioned Appendix C tables, however, we do not present total Practitioner sample results (e.g. results that combine librarians and *other* professional, or paraprofessionals) at any point in the main body of the report.

It is also noteworthy that 4 CARL libraries did not participate in the 2014 Practitioner Survey; thereby excluding roughly 255 librarians, and 680 support staff from the population of potential respondents. These same individuals were invited to participate in the 2004 Practitioner Survey, but there is no way of knowing which respondents were from these libraries and they therefore cannot be removed from the 2004 data set. As a result, comparisons between 2004 and 2014 Practitioner Surveys must be made carefully and it should be noted that the 2014 data set is broader than the 2003 data in the sense that it incorporates a greater range of types of staff, but narrower in the sense that it omits staff from certain libraries.

Though there are fewer Institutional Survey respondents simply because there are only 29 libraries in the CARL population set, the high response rates of 90% and 86% for the staffing complement and web survey portions, respectively, instill a high level of confidence in these results. At the same time, it should be kept in mind that, because the population is so small, a



slight over-time change can appear to be more significant than it is. For this reason, the percentage change threshold of ascertaining meaningful change is much higher for the Institutional Survey results than it is for the Practitioner Survey.

## CHAPTER 3: STAFF CHARACTERISTICS

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### Introduction

This chapter presents a portrait of permanent CARL librarians, *other* professionals, and support staff (as defined below) with respect to their population sizes, demographic characteristics, managerial levels, and career stages. The current 2013 / 2014 results are compared to the 2003 / 2004 results when appropriate and available. All data in this chapter are from the Institutional Survey, except for that relating to managerial level and career stage, which are from the Practitioner Survey (Tables 3 and 4 and Figures 11 to 13).

#### Staff Classification Definitions

**Librarians**: Individuals with an MLIS degree (or its historical equivalent) from a program accredited by the American Library Association or its equivalent

**Other professionals**: Professionals who are not required to have an MLIS degree and are not working as a library technician or library assistant and who perform work requiring knowledge of an advanced type, customarily obtained by a prolonged course of specialized instruction leading to a professional qualification OR professionals with an advanced degree, such as a PhD, who are hired for their content/subject matter expertise.

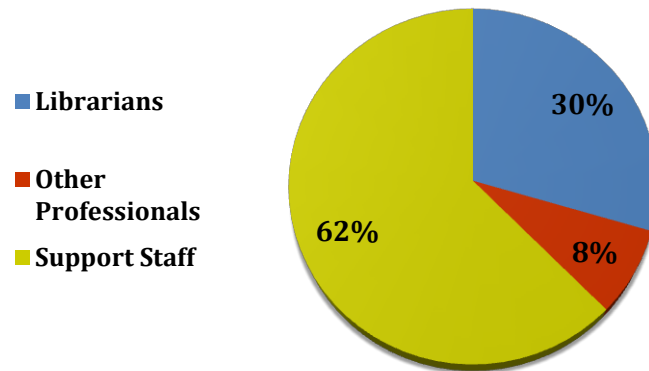
**Support Staff**: Individuals who work in a support role and typically do not have a master's degree in library or information science or in another discipline. Support Staff also includes **Paraprofessionals** who usually possess a technical certificate or diploma from a library technician program (e.g. IT support, library technicians), but they might also work in paraprofessional roles with an undergraduate degree and/or relevant experience (e.g. library assistants).

We begin by examining the three different types of library staff across library region and size, and survey year.

### Type of Library Staff: Library Region, Library Size, and Survey Year

As shown in Figure 2 below, close to two-thirds (62%) of all permanent staff working in CARL libraries are in support staff roles, 29% of whom are paraprofessionals such as library technicians, library assistants, and those providing information technology support. At 30%, librarians comprise the second largest staff group. *Other* professionals comprise just 8% of all permanent staff.

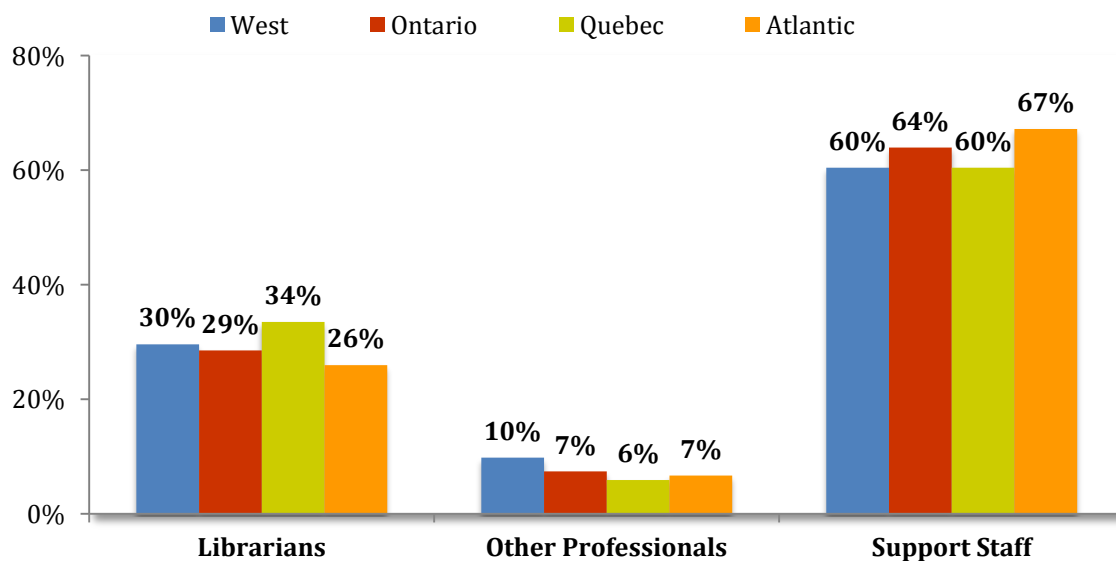
**Figure 2: Type of CARL Library Staff**  
(Permanent Staff Only; n=3,759)



Source: 8Rs 2013 Institutional Survey

Figure 3 presents the distribution across the three types of staff within each of Western Canada, Ontario, Quebec, and Atlantic Canada. Though geographic differences are not great, the figure demonstrates that Quebec libraries have the largest share of librarians (34%), Western Canada the largest proportion of *other* professionals (10%), and Atlantic Canada the largest share of support staff (67%).

**Figure 3: Distribution of Type of CARL Library Staff by Region<sup>1</sup>**  
(Permanent Staff Only; n=3,759)

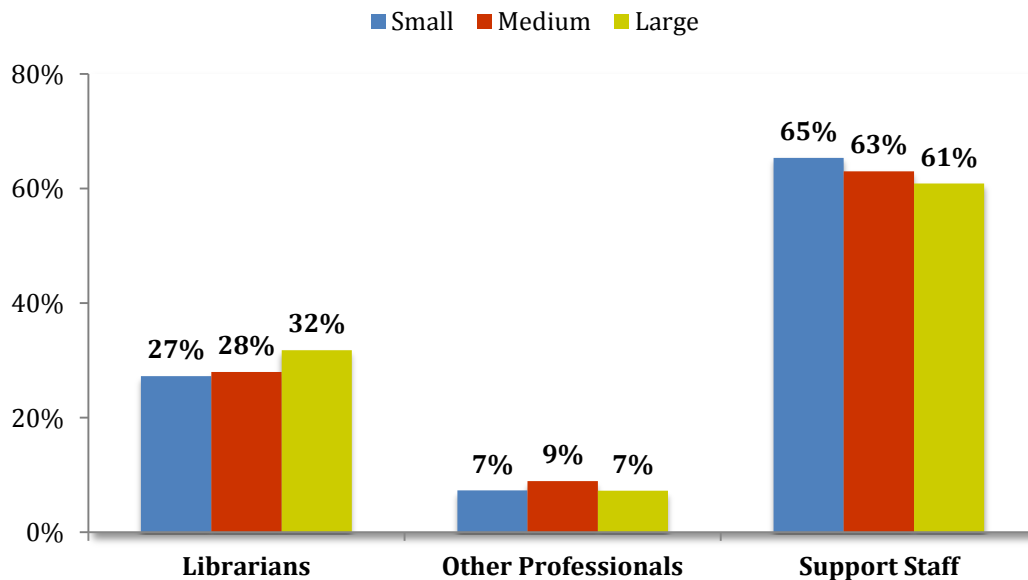


Source: 8Rs 2013 Institutional Survey

<sup>1</sup> West includes B.C., Alberta, Saskatchewan, and Manitoba. Atlantic Canada includes Nova Scotia, New Brunswick, and Newfoundland.

As shown in Figure 4, the composition of staff also varies somewhat by library size with large libraries most likely to have a greater share of librarians (32%) and small libraries most likely to have a greater share of support staff (65%). Again, however, distribution differences are not great. Thus, the dominant conclusion is that, though Quebec and large libraries tend to be comprised of a slightly larger proportion of librarians, the staff of CARL libraries are roughly comprised of 60% support staff, 30% librarians, and 10% *other* professionals.

**Figure 4: Distribution of Type of CARL Library Staff by Library Size<sup>1</sup>**  
(Permanent Staff Only; n=3,759)

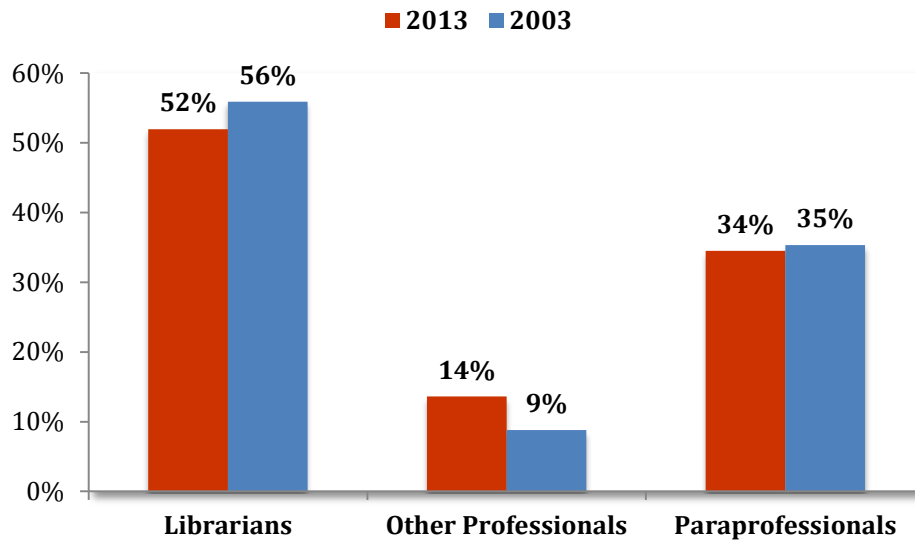


Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Small Libraries <100; medium libraries 100 to 200; large libraries 201+.

Figure 5 presents a comparison of type of staff between 2013 and 2003 (just data on paraprofessionals are compared since all support staff information was not gathered in 2003). In the past 10 years, *other* professionals increased their share of total staff by 5 percentage points (from 9% to 14%), whereas both librarians and paraprofessionals decreased their share slightly. It is important to understand that this shift in the distribution does not mean that there has been a reduction in librarian staff, but only that there was a reduction in their share of the total staff. Indeed, a more detailed analysis of the changing staff numbers presented in Chapter 7 demonstrates that all but non-paraprofessional support staff increased between 2003 and 2013. Otherwise, the pattern of increasing *other* professionals follows that documented in American academic libraries (Stewart, 2010).

**Figure 5: Distribution of Type of CARL Library Staff by Survey Year**  
 (Permanent Staff and 2003 to 2013 Comparable Libraries Only<sup>1</sup>;  
 2013 n=1,783; 2003 n=1,631)



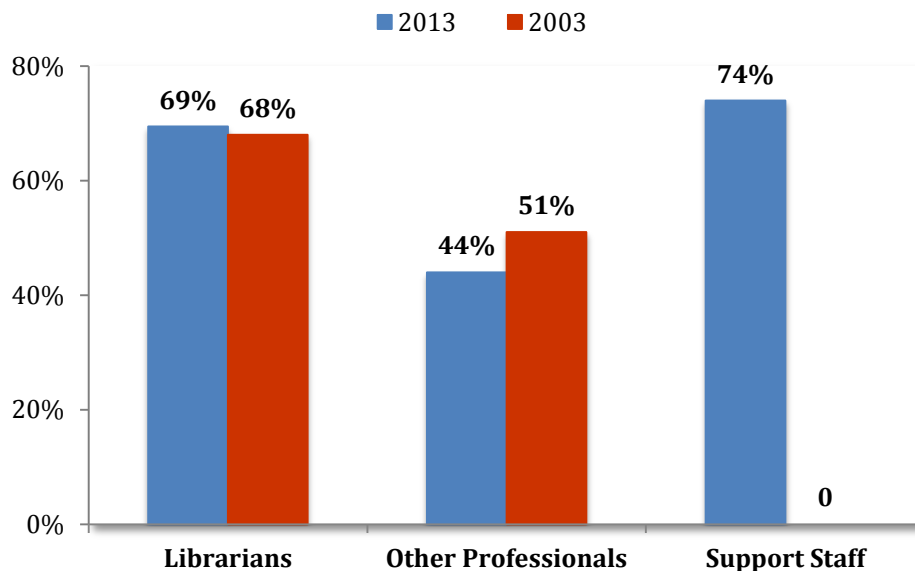
Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> To improve across time comparability, in a few instances, CARL official statistics (Table 8) are used when 8Rs data are missing. Data are only included if there is information for the number of staff of a library for both 2003 and 2013, thus explaining the different 'n' sizes than shown in Table 2. Given that CARL does not track the number of paraprofessionals, and we are unable to make substitutions, the number of paraprofessionals is provided for just 17 libraries.

### Demographic Characteristics: Gender, Designated Groups, and Age

As shown in Figure 6 below, CARL librarians and especially support staff are predominantly women (69% and 74%, respectively), whereas *other* professionals are most likely to be men (56%). Moreover, whereas the percentage of female librarians remained relatively stable in the past 10 years, *other* male professionals increased their representation by 7 percentage points, from 49% in 2003 to 56% in 2013. These findings suggest that the increase in *other* professionals observed in Figure 4 is increasingly comprised of new hires who are male.

**Figure 6: Percentage of Females by Staff Type<sup>1</sup> and by Survey Year**  
(2013 n=3,302; 2003 n=1,149)



Sources: 8Rs 2013 and 2003 Institutional Surveys

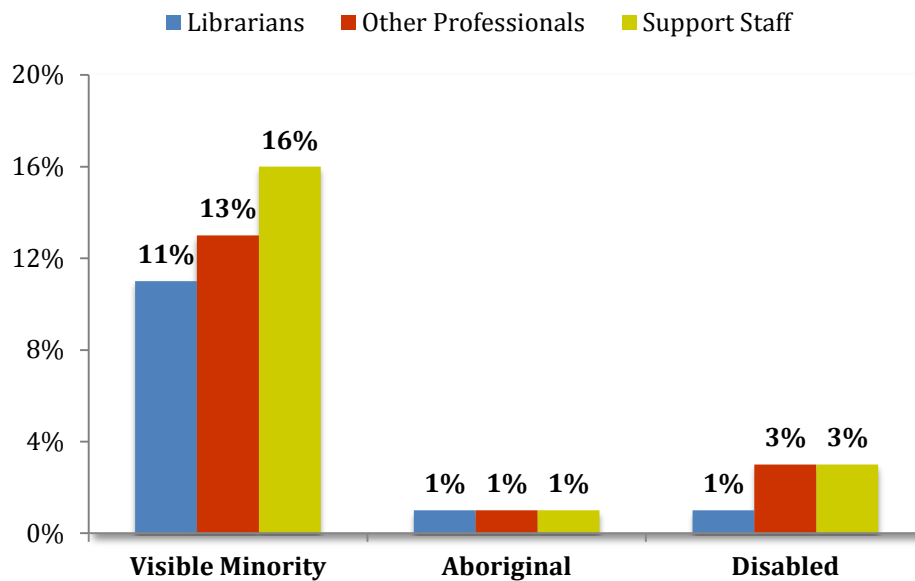
<sup>1</sup> Data on Support Staff are not available for 2003 and gender of paraprofessionals is not available for 2013.

Figure 7 demonstrates that visible minorities are the most likely to be working in support staff positions (16% compared to 11% of librarians and 13% of *other* professionals). Despite these variations, the figures are comparable to the 15% of visible minorities in Canada's labour force (Statistics Canada, 2006) and are slightly higher than the 8% of foreign undergraduate students (AUCC, 2011). Hence, though librarian visible minorities are slightly under-represented when compared to the Canadian labour force as a whole, they more than adequately mirror their student constituents.

In contrast and at just 1%, Aboriginal Canadians are not well represented in CARL libraries as librarians, *other* professionals, or support staff. Though Aboriginals are not sufficiently represented in postsecondary institutions as students either (comprising just 2% of the undergraduate population; AUCC 2011), by 2017 they are expected to comprise 3.4% of the Canadian working age population (Luffman and Sussman, 2007).

Finally, only 1% of librarians and 3% of both *other* professionals and support staff have a disability that may serve as an employment disadvantage. This compares to a disability rate among the overall working age population of 11.5%, approximately half of whom are in the labour force (Statistics Canada, 2008). Research also suggests that approximately half of the disabled individuals not in the labour force do not have a disability that prevents them from working (Panel on Labour Market Opportunities for Persons with Disabilities, 2013), a finding that highlights the likelihood that disabled Canadians face a range of barriers to gainful employment, some of which are rooted in human resource policies and practices.

**Figure 7: Designated Groups by Type of Library Staff**  
(n=2,152)

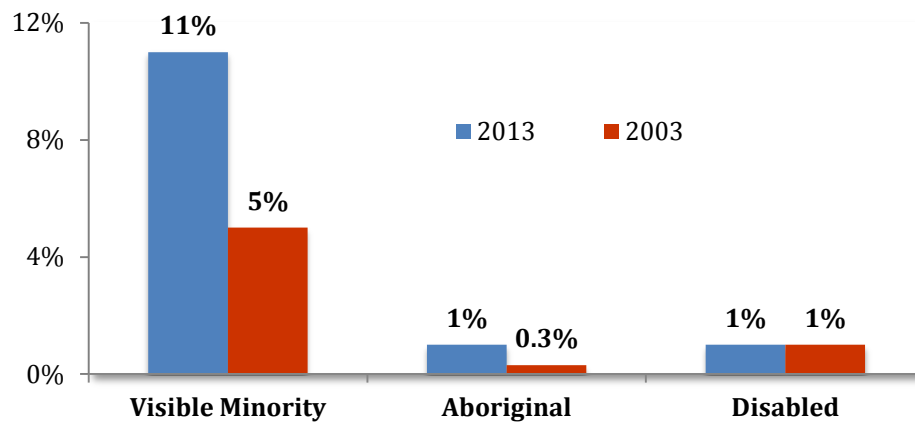


Source: 8Rs 2013 Institutional Survey

Most notable, however, is the finding shown in Figure 8 that librarian visible minority representation has more than doubled in the past 10 years (11% compared to 5%). Some caution should be taken when interpreting these findings, however, given that the series of questions on designated groups were answered by just 16 libraries for a response rate of 64%.

We take a closer look at CARL recruitment policies around diversity, and possible explanations for the increase in visible minority representation, as well as the lack of growth in Aboriginal librarians in the *Recruiting for Diversity* section at the end of Chapter 5.

**Figure 8: Librarian Designated Groups by Survey Year**  
(2013 n=600; 2003 n=826)



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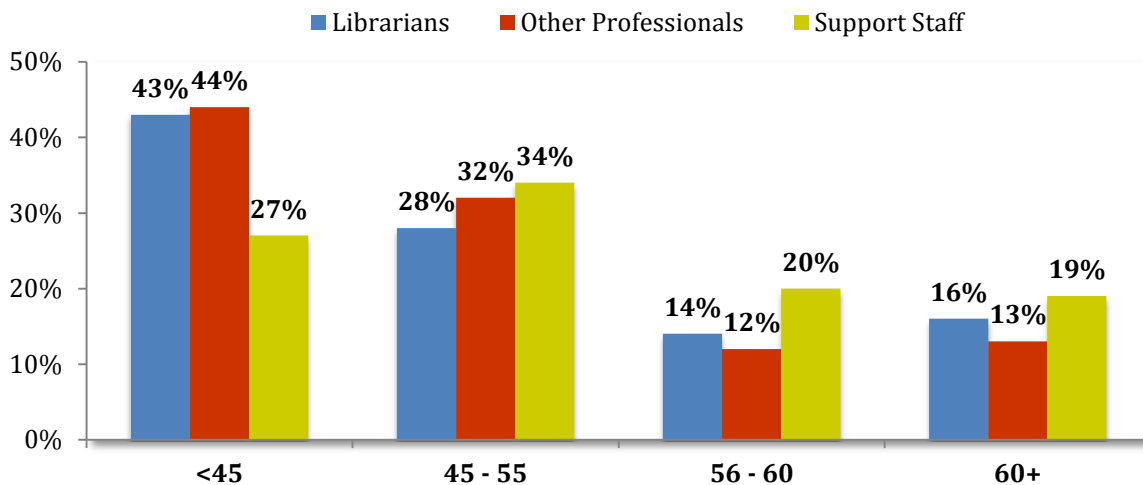
Sources: 8Rs 2013 and 2003 Institutional Surveys

The age distribution of CARL staff is presented in Figure 9 and has clear and important implications for retirements that are further analyzed in Chapter 6. The figure reveals that support staff tend to be the oldest and *other* professionals the youngest. Whereas about 4 in 10 support staff are over the age of 55, just 3 in 10 librarians and 2.5 in 10 *other* professionals are of the same age. The data suggest, therefore, that retirements are most imminent for support staff.

Notably, all three types of CARL library staff are older than the Canadian workforce as a whole, of which just 2 in 10 are over the age of 55 years (Statistics Canada, 2011). CARL librarians, however, are comparable to the age of Canadian faculty, 30% of whom were over 55 years of age in 2006 (Association of Universities and Colleges Canada, 2011).



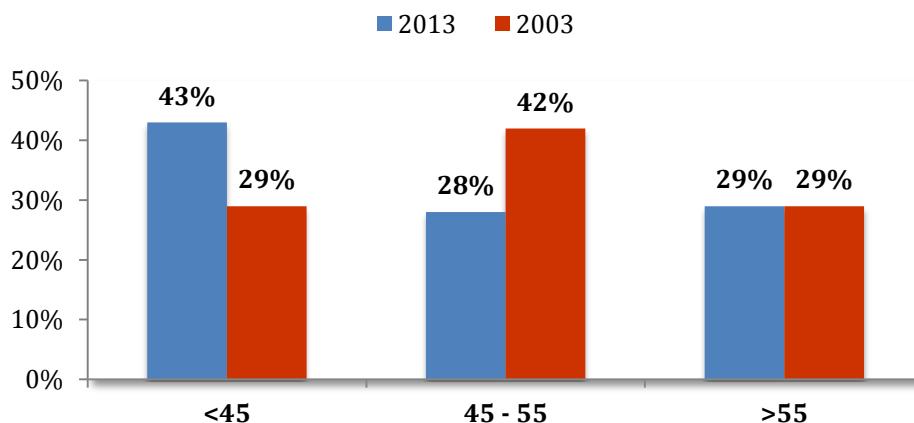
**Figure 9: Age Distribution by Type of Library Staff**  
(n=3,347)



Source: 8Rs 2013 Institutional Survey

Figure 10 illustrates that a significant shift in the age distribution of librarians has occurred in the past 10 years such that librarians are considerably younger now than they were in 2003. This is largely due to the injection of a less than 45 years of age cohort in the past decade, presumably from new hires, and signals a reversal of a trend towards an aging profession. Otherwise, it is important to note that with about 3 in 10 librarians still over the age of 55, the same proportion of librarians in 2013 and 2003 are within 10 years of retiring.

**Figure 10: Librarian Age Distribution by Survey Year**  
(2013 n=967; 2003 n=958)

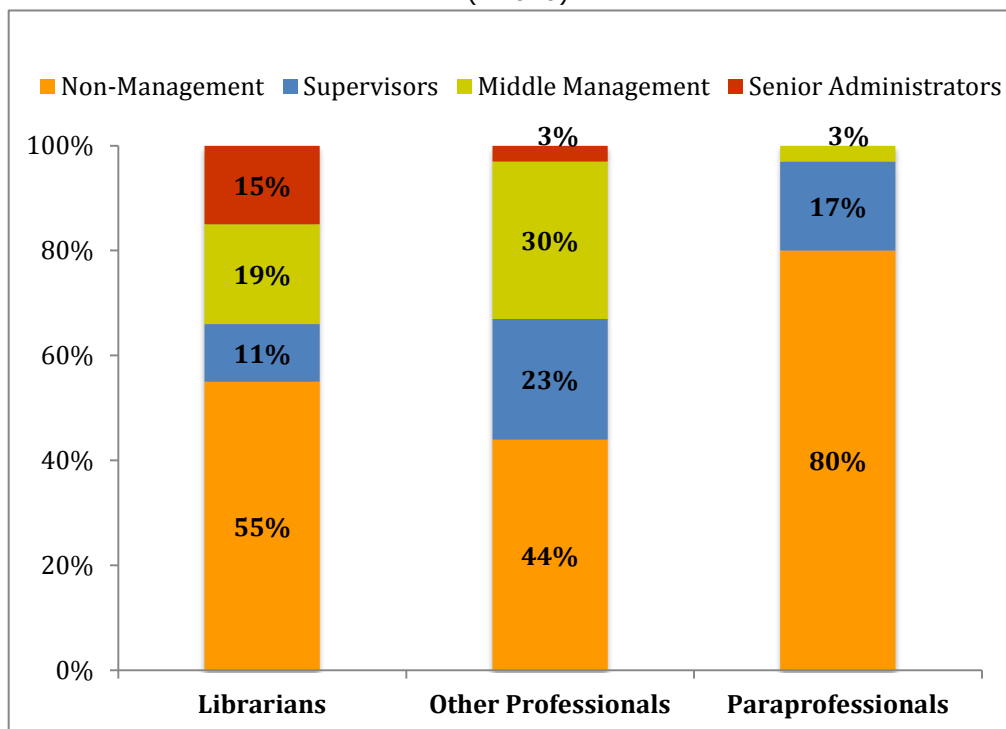


Sources: 8Rs 2013 and 2003 Institutional Surveys

## Managerial Level: Type of Staff, Survey Year, and Gender

Figure 11 presents the percentage of librarians, *other* professionals, and paraprofessionals working as non-managers, supervisors, middle managers, and senior administrators. The figure reveals that *other* professionals are the most likely to be in some type of supervisory / managerial role (56%), followed by librarians (45%), and finally paraprofessionals (20%). While *other* professionals are 2 times more likely than librarians to be supervisors (23% compared to 11%) and 1.5 times more likely to be working as middle managers (30% compared to 19%), librarians are 5 times more likely to be working as senior administrators (15% compared to 3%). As we would expect, just a small minority of paraprofessionals work as supervisors (17%), even fewer as middle managers (3%), and none (0%) work as senior administrators.

**Figure 11: Managerial Level<sup>1</sup> by Type of Staff**  
(n=810)



Source: 8Rs 2014 Practitioner Survey

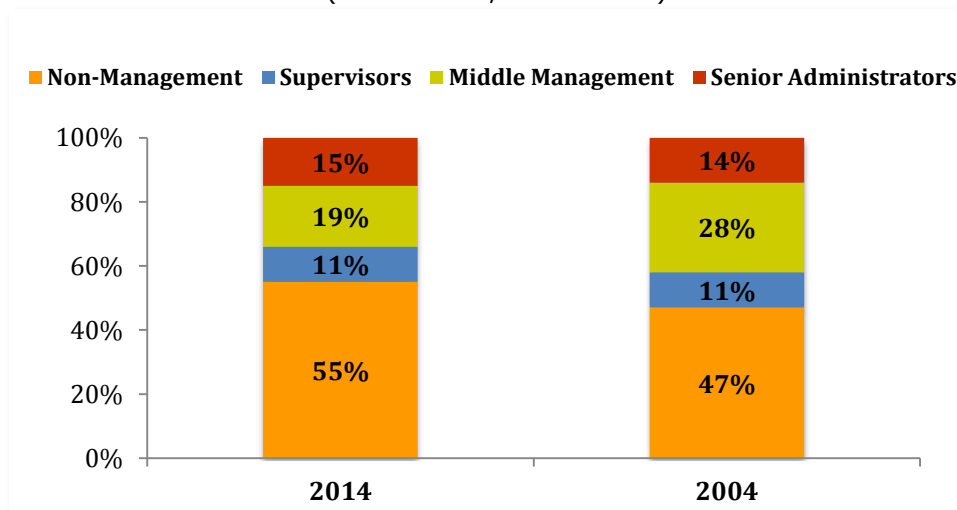
<sup>1</sup> Middle Management includes such positions as department head. Senior Administrators include such positions as head librarian / chief librarian / director / CEO or Assistant head librarian / chief librarian / director / or CEO.

Over time changes in managerial levels among librarians are presented in Figure 12. The figure reveals that a larger percentage of librarians are currently working in non-management positions than in 2004 (55% in 2014 up from 47% in 2004). Since the proportion working as supervisors and senior administrators has remained relatively stable (11% supervisors in both survey years; 15% and 14% senior administrators in 2014 and 2004 survey years,

respectively), the major explanation for the change is the reduction of librarians working in middle management positions, from 28% in 2004 down to 19% in 2014.

These findings are somewhat surprising given the well-documented trend of escalating management roles among librarians. While some of this difference may be due to sampling bias<sup>4</sup>, the reduction may also be partly a result of the movement of middle managers into senior management positions or from their retiring altogether. There is also some evidence to suggest that there has been restructuring of middle level management positions from within the ranks of librarians into the ranks of *other* professionals. Indeed, as already revealed in Figure 11, nearly one-third of *other* professionals work in mid-level positions. A number of the most common new *other* professional positions would be considered mid-level management positions (e.g. IT managers, Digital Media Manager, Library User Services Manager, Administrative Services Manager). Since *other* professionals comprise just 20% of all middle management positions (compared to 80% of librarians), however, this shift cannot explain the entire 9 percentage point decline. Furthermore, since we do not have sufficient data on *other* professionals from 2004, it is not possible to calculate this shift definitively. Role shifts among librarians, *other* professionals, and paraprofessionals are examined in greater detail in Chapter 7.

**Figure 12: Managerial Level<sup>1</sup> of Librarians by Survey Year**  
(2014 n=375; 2004 n=517)



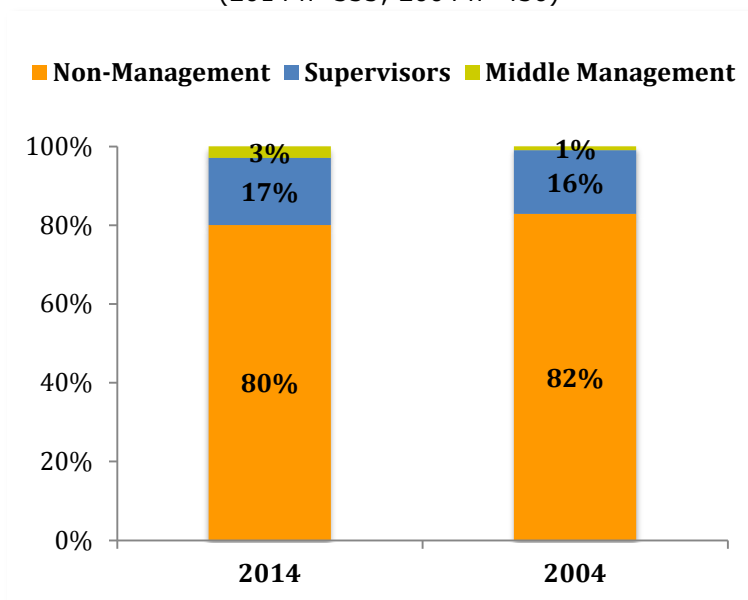
Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Middle Management includes such positions as department head. Senior Administrators include such positions as head librarian / chief librarian / director / CEO or Assistant head librarian / chief librarian / director / or CEO.

In contrast to the over-time shift observed in managerial positions among librarians, Figure 13 demonstrates that roughly 1 in 5 paraprofessionals continue to work in management and predominantly in supervisory roles.

<sup>4</sup> For example, perhaps middle management librarians were less likely to participate in the 2014 than the 2004 Practitioner Survey.

**Figure 13: Managerial Level<sup>1</sup> of Paraprofessionals by Survey Year**  
(2014 n=335; 2004 n=430)



Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Middle Management includes such positions as department head. Senior Administrators include such positions as head librarian / chief librarian / director / CEO or Assistant head librarian / chief librarian / director / or CEO.

Table 3 presents managerial levels for female and male librarians and for the 2004 and 2014 Practitioner Surveys. Looking first at the results for 2014, we observe an inconsistent pattern that is somewhat counter to the historical pattern of female under-representation in the highest ranking positions. As we might expect, female librarians are much more likely to be supervisors than male librarians (13% compared to 6%) and males are more likely than female librarians to be working in middle management positions (23% compared to 18%). At 15% for both females and males, however, gender parity is observed for the highest level of senior administrators. This finding represents a significant departure from 2004 where male librarians were nearly twice as likely as female librarians to be working as senior administrators (22% compared to 12%). The finding is, moreover, supported by CARL statistics showing that the number of women directors of CARL libraries has slowly increased in the past decade. Other researchers in part attribute the increase to the replacement of retiring male directors by women (Moran, Leonard, and Zellers, 2009).

Otherwise, the table demonstrates that the decrease in middle management positions observed in Figure 12 is primarily explained by a reduction in women occupying these mid-level posts. Whereas male middle managers decreased by just 3 percentage points between 2004 and 2014 (from 26% down to 23%), women middle managers decreased by 9 percentage points (from 27% down to 18%).

**Table 3: Managerial Level of Librarians by Gender and Survey Year**  
(2014 n=333; 2004 n=460)

	2014		2004	
	Female	Male	Female	Male
Total	100%	100%	100%	100%
Non-management	54%	56%	50%	35%
Supervisors	13%	6%	10%	16%
Middle Management <sup>1</sup>	18%	23%	27%	26%
Senior Administrators <sup>2</sup>	15%	15%	12%	22%

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Middle Management includes such positions as department head.

<sup>2</sup> Senior Administrators include such positions as head / chief librarian, director, CEO or Assistant head / chief librarian, director, or CEO.

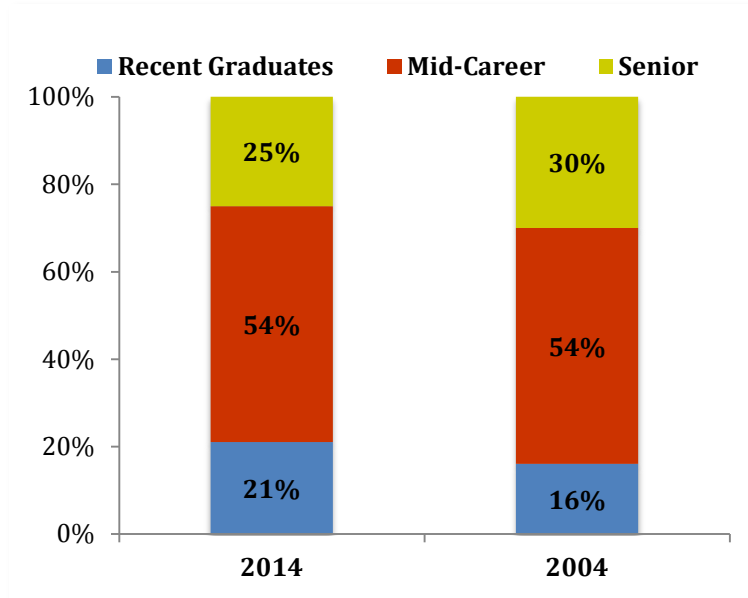
In summary, while female librarians have made some inroads into the highest-ranking posts in CARL libraries, they have lost ground in such middle management roles as department heads. That women have achieved parity with men as senior administrators, moreover, does not mean that they have achieved equity since they comprise a much larger proportion of librarians than men. To achieve proportional parity, 69% of senior administrators would need to be women (instead of the current 50%).

### **Librarian Career Stage: Survey Year and Managerial Level**

Career stage is based on respondent's year of graduation from their MLIS program with recent graduates defined as those who graduated less than 6 years ago, mid-career 6 to 24 years ago, and senior librarians more than 24 years ago. As shown in Figure 14 below, at 54%, mid-career librarians comprise the largest career stage in both survey years. In the same way that the over-time age data reflect new hires and retirees (Figure 9), we observe a shift from senior librarians (30% down to 25%) towards recent graduates (from 16% up to 21%).

Given the many changes that have occurred in the librarian profession in recent decades that not only affect the roles played in academia, but also possibly attitudes about the job and ultimately job satisfaction, an analysis of some of the Practitioner Survey data by career stage permits a type of measurement of change, as well as shows insight into the emerging roles and attitudes such as level of organizational commitment and level of interest in learning new skills and new technologies. The analysis of Practitioner Survey results for 2014 and 2004 based on career permits a distinction between the cohort effects based on career stage from the period effects of working in 2004 versus 2014. For example, by virtue of being in the profession the longest, senior librarians in both 2014 and 2004 are the most likely of the three career stages to have participated in leadership training and development (cohort effect). Alternatively, the finding that current senior librarians are not engaging in this training to the same extent as their senior predecessors tells us that either the interest in or the institutional offering of such training has changed over time (period effect).

**Figure 14: Career Stage<sup>1</sup> by Survey Year**  
(2014 n=402; 2004 n=456)



Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

As shown in Table 4, the relationship between career stage and managerial level is as we would expect: as individuals move through their career stages, participation in managerial positions and level of managerial position increases. For example, while just 17% of recent librarian graduates (defined as those who received their MLIS degree within the past 5 years) work in a managerial type position, 44% of mid-career and 63% of senior librarians are working the same capacity.

**Table 4: Librarian Career Stage by Managerial Level**  
(n=402)

<b>Career Stage<sup>1</sup></b>	<b>Managerial Level</b>			
	<b>Non- Management</b>	<b>Supervisors</b>	<b>Middle Management<sup>2</sup></b>	<b>Senior Administrators<sup>3</sup></b>
<b>Total Librarians</b>	<b>55%</b>	<b>11%</b>	<b>19%</b>	<b>15%</b>
Recent graduates	83%	12%	4%	1%
Mid-Career	56%	12%	18%	14%
Senior	37%	7%	29%	27%

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Middle Management includes such positions as department head.

<sup>3</sup> Senior Administrators include such positions as head / chief librarian, director, CEO or Assistant head / chief librarian, director, or CEO.

## Summary of Major Findings & Conclusions

Although librarians currently comprise a slightly smaller share of CARL's professional and paraprofessional staffing complement than they did in 2003 (down from 56% to 52%; Figure 5), their overall numbers increased by 3% (Table 21). *Other* professionals now comprise a slightly larger share of all staff (up from 9% to 14%) and grew by 72% (Table 21).

Librarians are twice as likely to be members of visible minorities than 10 years ago (11% compared to 5%; Figure 8), and they continue to be predominantly female (comprising about 7 in 10 librarians; Figure 6). The gender profile of *other* professionals, however, has shifted from being predominantly female in 2003 (51%) to predominantly male in 2013 (56%).

The librarian workforce is younger now than it was in 2003 (Figure 10), due to the hiring of new and presumably younger recruits, as well as the retirement of more senior librarian staff. On average, however, all types of staff are still older than the Canadian workforce (20% of whom are over the age of 55, compared to 30% of librarians, 25% of *other* professionals, and 39% of support staff; Figure 9).

Compared to 2004, librarians, especially female librarians, are less likely to be working in middle management (down from 27% to 18%; Table 3), a finding that partly reflects the elimination of these positions as librarians retire or as their positions are not renewed due to budget restraints. Evidence to this effect is provided in Table 12 where it is noted that nearly one-third of retiring librarian positions were not replaced. Given the growth in the number of *other* professionals, and the additional finding that nearly 50% of retired librarian positions were replaced with external candidates (Table 12), it may also be possible that the reduction in middle management is partly due to a shift in some of these positions from within the ranks of librarians to within the ranks of other professionals. Since just 7% of *other* professionals were hired into restructured positions (Table 24), however, this would account for only a very small number of lost librarian middle-management positions.

In contrast, whereas in 2004 male librarians were more likely than female librarians to be working in senior administrator positions (22% compared to 12%), gender parity is now observed (15% of both male and female librarians are senior administrators; Table 3).

## Strategic Human Resources Planning Implications

- The CARL workforce has become more diverse: there has been an influx of younger professionals (both librarians and *other* professionals), growth in the number of *other* professionals, and growth in the number of new staff who represent visible minorities. Care must be taken to assess the development requirements of newer staff and CARL organizational cultures and structures must be open and receptive to their presence and their needs.
- Much of the cohort of newer librarians is still clustered at a non-management career stage. Their career aspirations need to be ascertained and appropriate development and training



provided as these librarians will likely continue to be the face of CARL librarianship for the next thirty to forty years.

- While middle-management positions have decreased over the last ten years, there is some indication that a greater proportion of male than female librarians has reached middle-management levels in terms of career stage. CARL institutions need to assess interest in, and potential for, performing in management and leadership roles and ensure that opportunity for advancement is provided on an equitable basis.

## CHAPTER 4: ORGANIZATIONAL CONTEXT OF CHANGE

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### Introduction

Having examined the changing characteristics of CARL staff, this chapter presents findings about the organizational context of change that have implications for human resources in the library. The aim is to provide an understanding of change broadly and at the institutional level by analyzing recent organizational changes and perceived drivers of, and barriers to, change. The chapter concludes with a closer look at how budgets increasingly serve as a barrier to a range of human resource endeavors in CARL libraries.

Before doing so, however, it is instructive to frame these results and indeed many of those throughout the report with the general understanding that the need for continuous staff development is of uppermost concern in CARL libraries. This conclusion is evidenced by institutional respondents' opinions on what they think are the most pressing human resource issues facing the academic library sector over the next 5 years. Virtually all responded by commenting on the need to develop a highly skilled and flexible workforce, though with variation as to which aspect of this need was "most pressing." While some focused on how to develop the workforce by concentrating on the need to hire, to train, or to educate, others mentioned the need for specific roles including management, leadership, specialist, research, technology, and teaching skills and abilities. Yet others felt that employee resilience and adaptability to role change was the most pressing human resource challenge facing academic libraries. Finally, several institutional respondents referenced declining budgets as the most pressing issue, often, however, in conjunction with how this infringes upon the library's ability to develop their workforce through hiring or training.

These results depart from those of the original study. Ten years ago, dealing with current and looming retirements held sway as the most pressing human resources issue. In 2013, the issue of retirements was mentioned by only one library.

**Institutional respondents reached a near consensus in concluding that the most pressing human resources issue facing CARL libraries is to meet the need to continuously develop a skilled and resilient workforce that can flexibly respond to the changing demands and roles of the academic library.**

Many of the results for the remainder of the report are analyzed with this "most pressing human resources issue" in mind. Evaluation of the elements of human resources such as recruitment, retirement replacement, education and training, for example, includes determining the extent to which they contribute to the goal of developing a skilled, resilient, and flexible workforce.

## Organizational Changes

Table 5 presents the extent to which eight organizational changes have occurred in CARL libraries within the past 5 years as measured in 2013 and in 2003. On the whole, the results suggest that CARL libraries have been undergoing a considerable amount of sustained organizational change.

The two most notable observations to make from the table are the continued high prevalence of reengineering (96% and 95% in 2013 and 2003, respectively) and the increased proportion of libraries that have downsized (from 72% in 2003 to 90% in 2013). While reengineering may also be in response to the changing role of the academic library, both findings have clear implications for budgets, an issue that is dealt with in greater detail at the end of this section. Canadian research on academic libraries reveals that downsizing was previously most often done through attrition (Auster and Taylor, 2004), an aspect of retirements examined in Chapter 6.

**Table 5: Organizational Changes by Survey Year**  
(2013 n=22; 2003 n=25)

<b>Organizational Change</b>	<b>Percent Libraries Experiencing Change in Past 5 years</b>	
	<b>2013</b>	<b>2003</b>
Reengineering (redesigning processes to improve performance & costs)	95	96
Downsizing (reduction in number of employees to reduce costs)	90	72
Greater integration among different functional areas	86	92
Increase in degree of centralization	52	52
Greater reliance on temporary workers	38	32
Delaying (reduction in number of managerial levels)	32	56
Greater reliance on outsourcing	29	33
Greater reliance on part-time workers	10	16

Source: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "Yes" responses to the question "Has your library experienced any of the following organizational changes in the past 5 years?"

Despite recent concerns about the increasing precarious nature of work in Canadian libraries, the table also demonstrates that most CARL libraries are maintaining a small, but somewhat stable, non-contingent workforce with 38% relying to a greater extent on temporary workers, 29% on outsourcing, and 10% on part-time workers.

## Sources of Librarian Role Change

The introduction of new services and new technologies are clearly viewed as main sources of librarian role change across the spectrum of CARL libraries responding to the 2013 Institutional survey (Table 6; 100% and 95%).<sup>5</sup> Organizational restructuring (which could include reengineering, downsizing, centralization or decentralization, elimination or addition of new services / departments) was also perceived as a contributor to librarian role change to a moderate or great extent by a majority (82%) of institutional respondents. Nearly three quarters (73%) indicated that librarian retirements had at least some effect on change. It is not surprising that just 68% felt that budget cuts underlie role change since a reduction in funds is just as likely to explain why roles have not changed (see Table 7).

Overall, the table demonstrates that there is no single cause of change and that CARL libraries are faced with addressing a range of factors that impact librarians' roles.

**Table 6: Contributors to Librarian Role Change**  
(n=22)

<b>Contributors to Change</b>	<b>Percent Libraries Reporting Contributor to a Moderate / Great Extent<sup>1</sup></b>
Introduction of new services	100
Introduction of new technology	95
Organizational restructuring	82
Librarian retirements	73
Budget cuts	68
Elimination of services	41

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Not at all" and '5' meaning "To a great extent" to the question: "To what extent do the following explain why librarian roles have changed in the past 5 years?"

It is also instructive to consider the relationship among these factors with new technologies, retirements, and budget cuts classified as higher order changes that can cause second order changes including organizational restructuring and the elimination or introduction of services as well as the components of organizational change presented in Table 5 above.

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<sup>5</sup> A direct and meaningful comparison with 2003 results is not possible given that the question for the original survey asked respondents to select the top 3 contributors to change out of a list of possibilities that departs somewhat from the 6 contributors to change asked about in 2013. In 2003, increased use of IT was the most commonly selected response (88%), followed by reengineering (65%), and functional area integration (62%).

## Barriers to Change

To the extent that universities are “quasi” public sector organizations, their hiring (and firing) practices are bound by collective agreements in most instances. CARL library human resources are further defined by their individual university policies, practices, and cultures which in turn are influenced by the even wider context of the changing role and functions of higher education. Among this range of influences, budgets, collective agreements, organizational culture, and employee resistance to change stand out as being the greatest obstacles to making changes (91%; Table 7). Roughly 6 in 10 institutional respondents also felt that lack of employee involvement in change and the hierarchical structure of the organization served as barriers to change to a moderate or great extent.

**Table 7: Barriers to Change**  
(n=22)

<b>Barrier</b>	<b>Percent Libraries Reporting Barrier to Moderate / Great Extent<sup>1</sup></b>
Budgets	91
Collective agreements	91
Organizational culture	91
Employee resistance to change	91
Lack of employee involvement in change	59
Hierarchical organizational structure	57

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Not at all" and '5' meaning "To a great extent" to the question: "To what extent do the following serve as an obstacle to making changes in your library?"

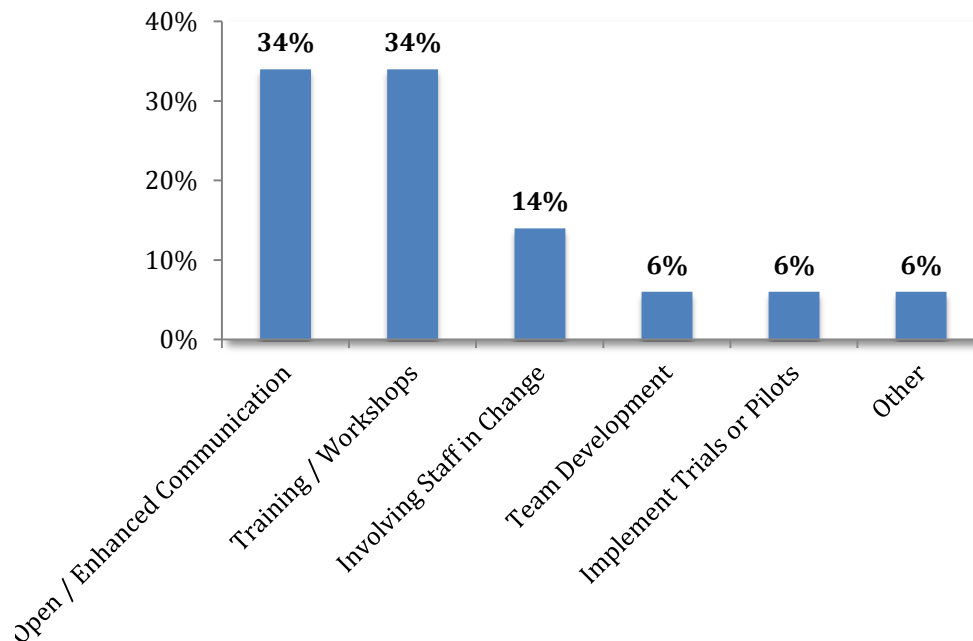
Further findings that bear on budgets and employee resistance to change are presented below beginning with a look at the various tactics used to encourage staff to adapt to change in Figure 15.

With many libraries expressing concern about the need to develop a flexible and resilient workforce and with 91% of libraries indicating that employee resistance to change serves as a barrier to change, the question arises as to what libraries are doing to help staff overcome such resistance. The two most common approaches used to encourage flexibility are by having more open or more enhanced communication with employees about the change process and the reasons for change and by providing training or workshops. The latter approaches include leadership and new skills training and workshops on how to prepare for and manage change.

Lastly, it is noteworthy that just 14% of institutional respondents reported to have involved staff in the change decision-making process given that this is, next to open communication, one of the most established methods of exacting successful change. The notion that resistance to change reduces with employee participation in change was recognized as early as the 1940s (Coch and French, 1948) and continues to be articulated in the literature. According to a leading Canadian expert on the workplace, Graham Lowe,

Successful change requires widespread collaboration. Healthy change processes move organizations forward by providing ever-expanding opportunities for others to become involved. Change is an opportunity for employees to be engaged in solving problems and taking ownership for results. (Lowe, 2010).

**Figure 15: How Staff Encouraged to Flexibly Respond to Change**  
(n=18 respondents, 35 responses)



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Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on categorized open-ended responses to the question "What, if anything, is your library doing to try to encourage staff to flexibly adapt to change?" Calculations are based on the number of responses (35).

## **The Budget Barrier**

Budgets have already been mentioned as an increasing concern for CARL libraries. As indicated by an increase in downsizing from 72% to 90% of libraries and as evidenced by their influence both as a contributor and a barrier to librarian role change, budgets play an increasingly limiting role in achieving the most pressing human resources issue of developing a skilled workforce. These findings are not surprising given the larger context of diminishing public funding and the fiscal stringency playing out in many large universities throughout Canada since 2008.<sup>6</sup> Other indications that declining budgets are a rising concern are presented in several other chapters of the report and include the following:

### **Chapter 5: Recruitment**

- Budgets serve as a barrier to recruiting librarians for 77% of libraries, up from 64% in 2003.
- An increase in hiring freezes or limited hiring policies serve as a barrier to recruitment for 65% of libraries, up from 28% in 2003.

### **Chapter 6: Retirement**

- Budgets serve as a barrier to replacing competencies lost by retiring librarians for 75% of libraries in 2013, up from 52% in 2003.

### **Chapter 10: Quality of Work and Job Satisfaction**

- Budget restrictions serve as a barrier to providing librarian promotional opportunities by 79% of libraries, up from 56% in 2003.
- Hiring freezes serve as a barrier to providing librarian promotional opportunities by 54% of libraries, up from 12% in 2003.

In summary, limited budgets are increasingly constraining the development of the 21<sup>st</sup> Century library workforce by reducing librarian staff through the loss of retirement positions; by reducing the ability to hire and to replace retired librarians; by constraining the ability to facilitate librarian role change; and by restricting the ability to provide promotional opportunities. As pointed out by Zabel (2005), moreover, the limiting affects of budgets on human resources may be greater now, not just because academic libraries are trying to do more with less (or the same), but because they are now more likely to be addressed with downsizing or de-professionalizing staff rather than by reducing collections as was once the case (Zabel, 2005).

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<sup>6</sup> Between 1981 and 2001, the government proportion of Canadian university operating revenue decreased from 84% to 55% (CAUT, 2014).

## **Summary of Major Findings & Conclusions**

A noteworthy shift has occurred in what is perceived as the most important human resource challenge. CARL libraries now view the broader issue of dealing with the persistent pressures of workforce development rather than retirements as the most important issue requiring attention.

Retirements are just one of several sources of organizational and human resource change and they do not have nearly the same impact on how librarian roles are changing as do new technologies and new services (Table 6). It is perhaps for this reason that CARL libraries, which have already had a significant portion of their workforce leave due to retirements (Table 15), no longer view this aspect of human resources to be as critical as it once was. Though many libraries had already experienced some level of retirements by 2003, the community concern at that time over the prospect of a swell of retirements perhaps surpassed the actual experience of retirements that has occurred in the past 10 years. Having already dealt with a degree of retirements while concurrently managing numerous other human resource challenges resulted in the relegation of retirements down the list of competing concerns. Thus, it is not that having to deal with retirements is no longer an issue for CARL libraries, but only that it is no longer the primary issue of concern.

Several indicators suggest that budgets are playing an increasingly limiting role in achieving the most pressing human resources issue of developing a skilled workforce. Not only are budgets considered to be a barrier to change by the vast majority of libraries (91%; Table 7), but they are increasingly viewed as a barrier to recruitment (up from 64% to 77%; Table 9) and to providing promotional opportunities to librarians (up from 56% to 79%).

## **Strategic Human Resources Planning Implications**

- CARL libraries have experienced sustained organizational change and this is most likely to continue given declining or stagnant budgets, new technologies and capacities, and the overall changing environment of postsecondary education. Somewhat paradoxically, strategies for dealing with, or capitalizing on, the challenge of developing a skilled workforce under these changing conditions have remained relatively constant over the past 10 years (Table 5). Some barriers, such as budgets or collective agreements, may prove intractable or difficult to change over the next 10 years, but barriers such as organizational culture and employee resistance to change can be addressed when organizations endeavor to work with staff on these issues. The literature on organizational change and development provides evidence that principles of organizational development (OD) can be used within higher education to address the underlying causes of organizational problems while still maintaining commitment to academic excellence. For a case study and one such example, see Ruben, 2005.



## CHAPTER 5: RECRUITMENT

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### Introduction

Early 21<sup>st</sup>-century indicators pointed towards an impending shortage of librarians owing to predictions of an extended wave of retirements, and in the U.S. a shortage of library school graduates. Concerns in the U.S. about recruitment continue, as evidenced by the following statement by the authors of the Workforce Issues in Library and Information Science (WILIS) research program:

There is no doubt that academic librarianship faces a serious challenge in trying to recruit and retain librarians. (Moran, et al, 2009 p332)

In fact, the recruitment crisis in academic libraries in the U.S. has been joined with issues of visible minority representation such that the crisis is now referred to as the "recruitment and diversity crisis." Accordingly, recruitment has been addressed by the Association of Research Libraries (ARL) on a number of fronts including actively recruiting librarians from under-represented groups.

In Canada, the original 8Rs revealed that, for the vast majority of CARL libraries, recruitment of librarians was not an area of much concern, a finding that held despite having, along with the Canadian Urban Libraries Council (CULC) libraries, the greatest amount of recruitment activity of all library sectors. These results suggest that CARL libraries were previously able to meet part of their ever evolving skill and knowledge demands with new staff.

However, as skill demands continue to alter under conditions of needing to replace the lost skills and knowledge from retiring staff, of creating new services and departments, and on the heels of sustained austerity budgets, the question arises as to whether CARL libraries have continued to fill vacant positions with relative ease.

As one of the 8Rs, re-examining the recruitment of librarians provides an indication of the dynamics of the job market both for prospective employees and for CARL libraries themselves. Importantly, recruitment activity is a barometer of organizational health, not just in terms of volume, but also in terms of skills fit and diversity. A "good" ability to recruit qualified librarians, moreover, is one indication of the ability to meet the "most pressing" human resources issue of developing a workforce with needed skills.

We begin the chapter by analyzing the ability of CARL libraries to recruit qualified librarians followed by barriers to recruitment. Examination of the backgrounds and early job experiences of recent MLIS graduates provides a perspective about the supply side of recruitment. At the library level, developing a diverse workforce starts with recruitment, the final area of investigation presented in this chapter.

## Recruitment Ability

Table 8 below presents three measures of recruitment ability from both the 2013 and 2003 Institutional surveys. Looking first at the 2013 results, more than 8 in 10 (82%) of CARL libraries rated their ability to recruit qualified librarians as good or excellent with a similar proportion (77%) indicating that their ability to do so is the same or better now than it was 5 years ago. The results in Table 8 also suggest that applicants for librarian positions consistently continue to be viewed as qualified. Overall, the table indicates that though the recruitment ability of CARL libraries reduced marginally between 2003 and 2013, it is still quite high.

**Table 8: Recruitment Ability by Survey Year**  
(2013 n=22; 2003 n=25)

Recruitment Ability	Percent Libraries	
	2013	2003
Good/excellent current ability to recruit qualified librarians <sup>1</sup>	82	92
Easier/same ability to recruit now compared to 5 years ago <sup>2</sup>	77	80
Same/more qualified librarian applicants compared to 5 years ago <sup>3</sup>	86	96

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Poor" and '5' meaning "Excellent" to the question: "How would you rate your current ability to recruit qualified librarians?"

<sup>2</sup> Based on responses of 1, 2, and 3 on a 5-point scale with '1' meaning "Much easier" and '5' meaning "Much more difficult" to the question: "How would you rate your organization's ability to recruit qualified librarians compared to 5 years ago?"

<sup>3</sup> Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Much less qualified" and '5' meaning "Much more qualified" to the question: "How would you rate the general qualifications of applicants for librarian positions compared to 5 years ago?"

## Barriers to Recruitment

Keeping in mind that a large majority of libraries indicated that they have a good or excellent ability to recruit qualified librarians, Table 9 shows that budget restraints are the most commonly cited barrier to recruitment (77%), a finding somewhat higher than the 2003 results of 64%. Along the same financial vein, nearly twice as many libraries indicated in 2013 than in 2003 (45% compared to 24%) that a hiring freeze or a limited hiring policy prevented them from hiring librarians. These findings have already been summarized at the end of Chapter 4 insofar as they contribute to a body of results demonstrating the growing constraints of budgets on human resources activities.

**Table 9: Recruitment Barriers by Survey Year**  
(2013 n=22; 2003 n=25)

Barrier	Percent Libraries Reporting Barrier to Moderate / Great Extent <sup>1</sup>	
	2013	2003
Budget restraints	77	64
Inadequate pool of qualified candidates	55	38
Inadequate pool of interested candidates	50	42
Hiring freeze / limited hiring policy	45	24
Competition from other Canadian library sectors	45	29
Need to hire bilingual staff	9	16

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 3, 4, or 5 on a 5-point scale with '1' meaning "Not at all" and '5' meaning "To a great extent" to the question "To what extent do the following issues prevent you from hiring qualified librarians?"

Just over half (55%) of library respondents indicated that an inadequate pool of qualified candidates is a barrier to recruitment, a barrier also higher than in 2003 (38%). Half of CARL libraries also reported an inadequate pool of interested candidates as a barrier, and Table 9 also provides some evidence that CARL libraries faced greater competition from other library sectors in 2013 (45%) than they did in 2003 (29%).

Overall, the results presented in Table 9 demonstrate that, compared to 2003, somewhat more CARL libraries in 2013 indicated each item as a barrier, with the only exception being for the need to hire bilingual staff (9% compared to 19%).

Despite the finding that recruiting qualified librarians is slightly more difficult than it was 10 years ago, the dominant story continues to be one of primarily unrestrained recruitment of qualified librarians except under conditions of budget limitations. In other words, budgets constrain recruitment more so than the quality of candidates, though an insufficient number of applicants could also hamper hiring to some extent.

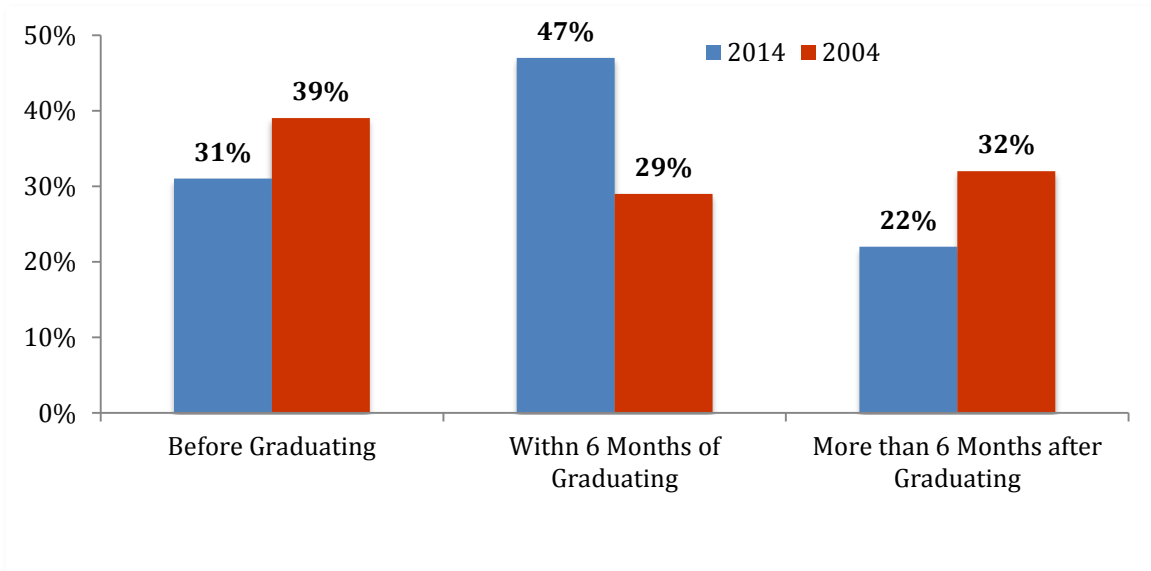
## Supply Side Recruitment

An examination of the first librarian positions among recent MLIS graduates (defined as those who graduated less than 6 years ago) provides insight into the supply side of the academic librarian labour market. As already depicted in Figure 14, these individuals represent 21% of all librarians who responded to the 2014 Practitioner Survey and 16% of 2004 respondents.

Figure 16 suggests a slightly more difficult market for recent MLIS graduates than 10 years ago. Whereas 39% of 2004 recent graduates already had a job lined up before graduating, 31% of 2014 graduates experienced the same level of ease into the job market. Overall,

however, with more than three-quarters (78%) of 2014 recent graduates working within 6 months of graduating (compared to 68% of 2004 recent graduates), the findings reflect a relatively smooth transition into the labour market and demonstrate that CARL libraries are able to accommodate the influx of recent graduates in a timely fashion.

**Figure 16: When Recent Graduates<sup>1</sup> Started First Librarian Position<sup>2</sup> by Survey Year**  
(2014 n=78; 2004 n=70)



Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Defined as those who graduated from an MLIS program less than 6 years ago.

<sup>2</sup> Based on responses to the question "After completing your library studies program, how long did it take you to find your first professional librarian position?"

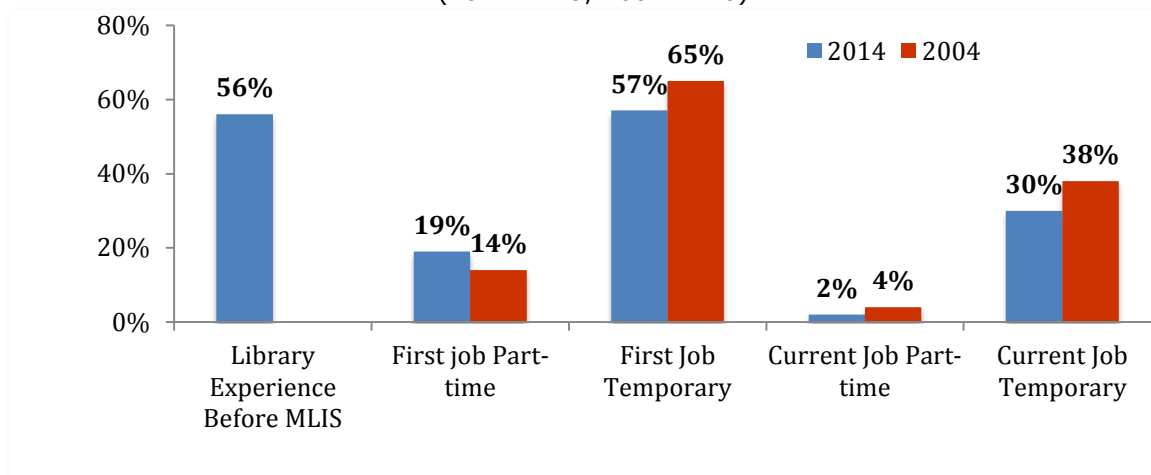
Moving to Figure 17, we observe that more than half (56%) of 2014 recent librarian graduates had library experience prior to entering their MLIS program.<sup>7</sup> This finding supports the original 8Rs finding that many librarians choose to enter the profession because of their previous experience working in a library.

Figure 17 also demonstrates that the incidence of part-time and temporary work for the first library position has been relatively stable. Furthermore, with significantly lower rates of part-time and temporary work among current recent graduates, the contingent nature of these first positions is most often short-lived.

<sup>7</sup> Results for 2004 are not comparable since recent graduates were asked if they had any library experience before graduating from their program which can include library experience both before and during their MLIS program and for which 90% responded affirmatively.

**Figure 17: Previous Library Experience and Work Status of First Librarian Position among Recent Graduate Librarians by Survey Year**

(2014 n=78; 2004 n=70)



Sources: 8Rs 2014 and 2004 Practitioner Surveys

Overall, though recent MLIS graduates are taking slightly longer to find their first professional position, they are still finding their way into CARL libraries with relative ease and in a timely fashion.

### Recruiting for Diversity

Canadian immigrants are increasingly selected for their education, training, and job skills, and they are coming from a wider variety of source countries than in the past. Despite being more highly educated, however, recent immigrants are experiencing greater difficulty adjusting to the Canadian economy than did their predecessors (Picot, 2008), with more than half of all immigrants now undergoing some retraining to obtain a Canadian credential (Lo et al, 2010). Indeed, Canada's labour force increasingly demands the attraction and the utilization of skilled immigrants. The aging work population and contraction of the proportional size of new labour force entrants means that immigrants are now the main source of labour force replacement in Canada. Statistics Canada estimates that by 2031, roughly one in three people in the labour force in Canada will be foreign born (reaching as high as 40% in Ontario and B.C.), up from less than 1 in 5 in 2006 (Statistics Canada, 2011b).

Though the precise way that these Canada-wide labour estimates translate into future pools of qualified visible minority librarian applicants is unknown, they do suggest an increasingly diverse university population. The extensive diversity literature in the United States demonstrates that "institutional commitment to diversity results in positive educational outcomes for all students" (Offord, 2006). It is thus incumbent upon CARL libraries to strive to ensure that their professional staff reflects the changing demographics of their student and professorial campus cohorts.

As already depicted in Figures 7 and 8, Aboriginal representation has not changed between 2003 and 2013 (stagnant at around 1%); however, librarians are now more than twice as likely to be visible minorities than in 2003: increasing from 5% in 2003 to 11% in 2013, a figure approaching the 15% of visible minorities in Canada's labour force and higher than the 8% of foreign undergraduate students.

### **Library policies related to diversity**

Despite the growth in visible minority librarians, very similar proportions of CARL libraries had a policy designed to encourage the recruitment of librarians from diverse ethnic and racial backgrounds in both survey years (73% in 2013 compared to 77% in 2003). The apparent growth in visible minority librarians in the past 10 years could be due to the more effective application of diversity policies, or it could be due to an increase in the pool of qualified visible minority applicants.

### **Barriers to Diversity**

CARL institutional respondents were also asked to provide their views on the extent to which a series of reasons explain the low visible minority representation among librarians.<sup>8</sup> As shown in Table 10, four out of the possible five explanations were viewed as reasons for visible minority under-representation to a moderate or great extent by a large majority of respondents. It is not surprising that fewer respondents indicated racial discrimination as a barrier, but still illuminating that 2 in 5 felt that it explained visible minority under-representation.

The results demonstrate that not only are qualified visible minority applicants scarce, but the process of ascertaining foreign LIS education for applicants is sufficiently complex to be viewed as a barrier to recruitment. Indeed, research shows that decisions about hiring internationally-educated librarians is problematic given that there is little access to information about LIS education in countries other than the UK, Australia, and New Zealand, a list of non-North American national accreditation bodies is not readily available, and information is not always provided in English or French (Dali and Dilevko, 2009). The decision to hire western-educated candidates is understandable, therefore, when faced with a choice between the quality assurance afforded by an ALA-accredited candidate and the unknown or difficult to evaluate internationally-accredited candidate. Given that CARL libraries do not generally experience much difficulty in recruiting qualified librarians (Table 8), it is likely that there is little or no motivation to evaluate foreign LIS credentials, especially given difficulty in doing so and perhaps especially if applicants qualifications are otherwise insufficient in some way.

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<sup>8</sup> The question was obviously asked before the 8Rs Redux results revealed the equitable visible minority representation.

**Table 10: Barriers to Visible Minority Representation  
as Librarians in Canada**

(n=22)

<b>Barrier to Visible Minority representation</b>	<b>Percent Libraries Reporting to a Moderate / Great Extent<sup>1</sup></b>
Insufficient pool of qualified visible minority applicants	86
Insufficient pool of visible minorities in LIS school	86
Insufficient pool of visible minority applicants	82
Complexity of ascertaining foreign LIS education	82
Racial discrimination	41

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on responses of 3, 4, or 5 on a 5-point scale with '1' meaning "Not at all" and '5' meaning "To a great extent" to the question, "To what extent do each of the following items explain why visible minorities might not be represented as librarians in Canadian libraries?"

Of course, not all foreign-educated librarians are visible minorities and not all visible minorities are educated abroad. With respect to the latter, 86% of library respondents indicated that an insufficient pool of visible minorities in LIS schools explained their under-representation. U.S. research also demonstrates a consistent pattern of under-representation of visible minorities in LIS schools (Kim and Sin, 2008). As a response, in 2000 ARL libraries established the "Initiative to Recruit a Diverse Workforce" which, among other benefits, provides funding for MLIS programs to traditionally under-represented groups.

Finally, it is noteworthy that though many of the barriers presented in Table 10 also apply to Aboriginal Canadians, the consistently low level of Aboriginal librarian representation in CARL libraries (1%) is an issue that has never been thoroughly researched nor substantively addressed in Canada. While we know that Aboriginal Canadians are not well represented in universities in any capacity (only 8% of Aboriginal people aged 25 to 64 in Canada have a university degree compared to 23% of non-Aboriginals; Statistics Canada, 2011), we do not know how many enter MLIS programs nor what might encourage greater participation in information and library science programs. Promising U.S. research demonstrates, however, that Native Americans are especially interested in participating in distance learning LIS options (Kim and Sin, 2008), an idea worth further exploration among Aboriginal Canadians.

## **Summary of Major Findings and Conclusion**

The majority of libraries have a good or excellent ability to recruit, roughly the same as in 2003 (Table 8). Reduced ability to recruit, such that it exists, is primarily due to budgets (Table 9). Indicators also suggest that, from the supply side perspective, the job market for recent MLIS graduates does not significantly depart from that of the 2004 recent graduates (Figure 16). In broad terms, therefore, recruitment of librarians appears to be supporting the development of a skilled and flexible workforce. Chapter 8 examines the extent to which supply meets the demand for specific competencies through recruitment.

## **Strategic Human Resources Planning Implications**

- As in 2004, CARL libraries are not experiencing much difficulty in recruiting qualified applicants, with budgets serving as a key limiting factor in recruitment. However, given limited budget resources, deciding which positions to recruit into and whether these positions are best filled by librarians, *other* professionals, or support staff, will continue to be major questions in CARL recruitment. The necessity for clear definitions of roles and responsibilities and for understanding the emerging needs of CARL library organizations will also persist and remain a focus of recruitment activity.
- Observable gains in staffing diversity have been made by CARL libraries, particularly in employment of staff who are visible minorities. However, attention cannot be diverted away from increasing the diversity of the CARL workforce and equity plans continue to be important. Some CARL employers have instituted scholarships and internships for aboriginal students; these are a progressive and enlightened response to increasing the number of aboriginal candidates for library positions. Equal attention should be paid to disabled individuals who are qualified and available for work. The increasing prevalence of on-line education options in Canadian MLIS and other post-secondary programs may also help to strengthen the numbers of applicants identified in Canada's employment equity legislation and enlarging the pools of candidates for jobs in CARL libraries.



## CHAPTER 6: RETIREMENT

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### Introduction

The effect of mass retirements on the viability of the labour market is a leading concern in Canada. The oldest baby boomers turned 65 in 2011, suggesting that the wave of retirements has just begun and that associated skills shortages are still looming. Importantly, the largest crest of the wave is yet to come as the biggest bulge of baby boomers, who are towards the tail end of the cohort and are currently in their young 50s, begin to retire in roughly 5 years and do not reach 65 years of age for another 15 years (Statistics Canada, 2011a).

Indeed, the 8Rs study initially began precisely because of growing concerns in the community that libraries were facing mass retirements in the coming decades. It is now a familiar fact to many that librarians, and especially academic librarians, are older than the rest of the working population.<sup>9</sup> As a result, the age curve of Association of Research Libraries (ARL) professionals shows that the high rates of retirements have already begun and are predicted to peak between 2010 and 2015 (Wilder, 2007a)

Alarm bells about librarian retirements have been ringing for at least a decade with the loudest sounds heard south of the border and the most recent, according to a U.S. Conference Board report which has identified a shortage of librarians, along with sea captains (Levanon and Cheng, 2014). Yet, retirements are not front and center for CARL libraries to the extent that they were in 2003 as already noted by a shift in institutional respondents' responses to the question on the most pressing HR issue (Chapter 4). The findings raise the notion that perhaps retirements are not always experienced in a negative way: if librarians are required to change as much as other indicators suggest (Chapters 7 and 8), then retirements might in some cases be a method of clearing the way to recruit librarians with more highly demanded skills. In contrast to the depiction of the skills crisis typically associated with retirements, it has been argued that it can provide a much needed opportunity to dramatically reshape human resources within academic libraries to meet new demands in, for example, computer and information technology skills (Sennyey et al, 2009). And, as noted by an Association of College and Research Libraries (ACRL) Research Committee tasked with developing ten assumptions about the future that would have a significant impact on academic libraries and librarians,

The aging of the profession can be viewed as having a number of positive benefits, for as retirements increase, new opportunities will open for a new generation of MLS librarians and other allied professionals. Libraries that are open to creating new career paths within their organizations are in an optimal position to embrace the future (Mullins et al, 2007)

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<sup>9</sup> This older age profile is mainly due to the large number of academic librarians hired in the 1960s combined with the fact that, for many, librarianship is a delayed or second career.

In general, it is said that younger workers can add mental energy, fresh perspectives, and new ideas to the profession, whereas older workers can contribute a deep reservoir of knowledge and wisdom developed through years of experience. Arguably, both are essential to the wellbeing of the library, but achieving the proper mix is not always straightforward (Wilder, 2007).

With both views of retirement in mind (as an indication of skill shortages and as an opportunity to reshape the workforce), we examine retirements in CARL libraries. The following analysis includes a look at previous 8Rs predictions about retirement rates compared to what has actually happened in the past 10 years. Such a comparison not only illuminates what CARL libraries have been dealing with numerically speaking, but it provides an indication of the accuracy of assumptions made in 2003 about retirement timing, an exercise that could not possibly have accounted for the 2008 – 2010 recession. Retirements, of course, have implications for the viability of the workforce that go far beyond counting heads, and in this regard, it is also important to examine the extent to which CARL libraries were able to recoup the skills and abilities lost from the exit of their most senior librarians. With the trends and indicators of retirement age in mind, predictions for retirement in the next 5 and 10 years are presented, followed by an assessment of CARL libraries' succession planning strategies and preparedness for retirements in light of expected future retirements. We conclude the chapter with a look at retirements among paraprofessionals and *other* professional staff.

## **Predicted Versus Actual Librarian Retirements**

In 2003, nearly 30% of CARL librarians were over the age of 55, which at the time was almost triple the Canadian figure of 11%. The older age profile of librarians and their predicted retirements suggest that CARL libraries have needed to adjust to the loss of at least one-third of their workforce whether through recruitment or restructuring efforts.

At the same time, CARL libraries have been recalibrating their workforce and job functions around retirements for at least 15 years. Results from the original 8Rs study reveal that, although most CARL libraries dealt with previous retirements relatively seamlessly (just one-third experienced difficulties replacing the skills and knowledge of retirees), a larger share was predicted to retire henceforth. Specifically, CARL libraries as a whole lost 16% of their professional librarian workforce due to retirements between 1997 and 2002. Using a retirement age scenario of 65, another 25% of librarians were predicted to have retired by 2013 and a full 35% predicted to retire using 63 years as the minimum cut off for retirements.

Indeed, at a retirement rate of 30%, the results from the current 2013 Institutional Survey presented in Table 11 demonstrates the actual retirement rate to be precisely half way between the two predicted scenarios of 25% and 35%. Specifically, of the 24 CARL libraries

reporting data, 330 librarians retired between 2003 and 2013, representing 30% of the 2003 librarian cohort.<sup>10</sup>

Table 11 also shows that there were an average of 14 retirements per library; however, retirements varied considerably across libraries with as few as 3 and as many as 47 librarians retiring in a CARL library in the past 10 years. This variation is reasonable given the wide range in the number of librarians across libraries (from a low of 17 to a high of 81) and highlights the intra-variability of CARL.

**Table 11: Librarian Retirements in Past 10 Years (2003 to 2013)**  
(n=24)

<b>Librarian Retirements (FTE)</b>	<b>330</b>
Retirement rate (based on 1,083 librarians in 2003)	30%
Average # retirements per library	14
Range of retirements per library	3 to 47

Source: 8Rs 2013 Institutional Survey

## Replacing Retiring Librarians

To fully understand the repercussions of the retirement of hundreds of librarians, it is important to examine what happened to the positions left from these retirements and the extent to which difficulties were experienced replacing the competencies of the departing librarians. Presumably, retiring librarians are not just creating empty posts, but they are creating vacancies in important knowledge, skills, and experience. In total, for example, retirements between 2004 and 2013 represent a CARL workforce loss of more than 5,500 years in collective cumulative librarian experience (at an average career length of 32 years).

Table 12 demonstrates that nearly 3 in 10 (27%) positions vacated by retiring librarians were not replaced, amounting to a loss of 86 positions due to attrition. Among the 74% of positions that were replaced, fully two-thirds (159 positions) were replaced by candidates external to the library. One possible interpretation for why external replacements out-number internal ones is that the positions were restructured into entry-level positions which are almost always filled by external candidates. In fact, 45% of newly recruited librarians in the past 5 years were hired into either restructured or newly created positions (Table 24). This interpretation is also supported by the trend for librarians to stay with the same library throughout their career, suggesting that it is unlikely that even a minority of the 159 librarians relocated to a CARL library.

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<sup>10</sup> When extrapolating the 30% retirement rate to the CARL libraries not represented in this study, we calculate the total librarian retirements between 2003 and 2013 to be 381.

**Table 12: Retiring Librarian Position Outcomes**  
(n=21)

<b>Position Outcome</b>	<b>Percent<sup>1</sup></b>
Positions replaced with internal candidate	25
Position replaced with external candidate	49
Positions not replaced	27

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on 238 FTE retiring librarians for which replacement information is available.

In this sense, the data in Table 12 provide a good overall indication of the four possible outcomes for positions that have been vacated by retiring librarians. Taking some liberties with the assumptions behind these results and what they represent, there is evidence that one quarter of retired positions have been replaced with librarians in the same library; another quarter were lost through attrition; and half were either restructured into entry level positions that are very likely to be filled with external candidates, or they were senior administrative positions filled with external candidates. For the latter, the findings point toward a preference to hire external candidates into senior positions, and possibly a deficiency in succession planning that involves grooming of internal staff for senior-level positions.

With these findings in mind, Table 13 presents results measuring the extent to which institutional respondents felt that their internal pool of candidates was equipped to replace the competencies lost from librarians retiring within the past 5 years. With 92% of libraries indicating that their pool of librarians was adequate to replace the general skills and abilities lost by departing librarians, the loss of general librarian skills does not appear to pose a problem.

**Table 13: Adequacy of Internal Candidates in Replacing Competencies of Retired Librarians over Past 5 Years**  
(n=24)

<b>Competency</b>	<b>Percent Reporting Adequate / Very Adequate<sup>1</sup></b>
General skills and abilities	92
Managerial skills	52
Leadership abilities	44

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on responses of '4' and '5' on a 5-point scale with 1 meaning "not at all adequate" and 5 meaning "very adequate" to the question: "Over the past 5 years, how adequate was your pool of internal candidates in replacing the following characteristics of your departing senior librarians?"

The same level of confidence, however, is not apparent for managerial skills and leadership abilities, two competencies that arose in the original 8Rs as being unequivocally and increasingly needed by libraries but difficult to fulfill. In other words, Table 13 demonstrates that managerial skills and leadership abilities continue to be deficient competencies for a small majority of CARL libraries.

Due to changes to the questions asked about competency replacement in the 2013 Institutional Survey, direct comparison between the results presented in Table 13 and those from the 2003 Survey must be made cautiously. Nonetheless, it is interesting that compared to 2013, wherein 44% of respondents felt that their pool of internal candidates had been sufficient in replacing the leadership qualities of retiring librarians in the past 5 years, in 2003 just 28% of respondents felt that their current pool of candidates would be adequate to replace the leadership abilities of imminently retiring librarians. Thus, while the 2013 question asks respondents to draw upon what has actually happened and is therefore a better measure than the 2003 question, which is more speculative in nature, the difference in results suggests that the leadership problems highlighted in the original 8Rs study are perhaps not as serious as was reported at that time. Still, that roughly 2 in 5 CARL libraries report that they lack internal candidates able to succeed the leadership of retiring librarians does not constitute a crisis, but it does point toward the continuing need to develop and implement succession planning that incorporates leadership. These findings might also partly explain why nearly half of retired positions were replaced with external candidates.

When asked if there were any other competencies than those listed in Table 13 that were difficult to replace from retirements, about half of institutional respondents provided a response. Many included clarification that the positions vacated due to retirement were restructured into high-tech related roles that are in greater demand and that are better suited for more recently educated librarians. These findings, therefore, provide further support for the interpretation of the results in Table 12 that at least some of the 159 externally replaced positions were restructured positions.

Table 14 illustrates the significance of 13 possible barriers to replacing competencies lost through departing senior librarians. We have already mentioned the limitations that budgets have increasingly put on developing the human resources in CARL libraries (Chapter 4), and so it is no surprise that budget restraints and a hiring freeze or limited hiring policy have increased significantly such that they are now at the top (75%) and near the top (63%) of the list of barriers to replacing the competencies lost by retiring librarians. We can conclude, moreover, that financial constraints are a main underlying cause for the attrition noted in Table 12 above.

Table 14 also shows that the inadequacy of on-the-job (post-MLIS) leadership training / development is a much greater barrier to replacing retiring librarians than is MLIS education in these areas. While 75% of libraries report inadequate post-MLIS leadership development as a barrier to a moderate or great extent, 54% felt the same way about MLIS leadership education. The same pattern is observed for management training.

**Table 14: Barriers to Replacing Competencies Lost from Retiring Librarians by Survey Year**

(2013 n=24; 2003 n=25)

Barrier	Percent Reporting to a Moderate / Great Extent <sup>1</sup>	
	2013	2003
Inadequate <b>post-MLIS</b> leadership development	75	n/a <sup>2</sup>
Budget restraints	75	52
Inadequate <b>post-MLIS</b> management training	75	n/a <sup>2</sup>
Hiring freeze or limited hiring policy	63	28
Inability to fast track strong candidates	63	56
Absence of succession planning strategy	61	64
Elimination of middle-level positions that serve as basis for senior positions	61	52
Inadequate pool of qualified candidates	58	60
Geographical location	54	24
Inadequate pool of interested candidates	54	52
Inadequate leadership training provided by MLIS programs	54	56
Inadequate management training provided by MLIS programs	36	n/a <sup>3</sup>
The need for bilingual staff	13	16

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of '3', '4' and '5' on a 5-point scale with '1' meaning "Not at all" and '5' meaning "To a great extent" to the question, "To what extent do the following items prevent your library from replacing the competencies lost by departing senior librarians?"

<sup>2</sup> In 2003, 25% of CARL libraries indicated that *inadequate leadership / management training* prevented them from replacing the competencies lost by departing senior librarians.

<sup>3</sup> Not asked in 2003.

Overall, the table demonstrates that there is a wide range of reasons why CARL libraries might find it difficult to fill the vacuum of competencies left by retiring librarians over the years, some of which speak to the quality of candidates (over half indicated an inadequate pool of qualified (58%) or interested (59%) candidates as barriers) and others that bear on human resources practices. With respect to the latter, most noticeable is the finding that 61% of CARL library respondents reported that the absence of a succession-planning strategy served as a reason why their library experienced difficulties replacing the competencies lost by retirements. We examine the succession-planning practices of CARL libraries in more detail later in this chapter.

Other than the aforementioned budget-related barriers, the only notable difference between the 2013 and 2003 survey results is that two times as many libraries indicate geographical location as a barrier to replacing competencies (from 24% to 58%). Given that library locations are constant, we have no additional data that might help explain this finding.

## Age of Retirement

Before developing predictions of future librarian retirements, it is instructive to first examine age of retirement in a number of ways. In addition to a quick review of retirement trends in North America, we look at the age of retirements among those who retired between 2003 and

2013, the changing retirement expectations of mid-career and senior librarians, and policy contingencies that can influence librarian decisions about when to retire.

While the average age of retirement has been gradually decreasing since the 1970s (from 65 years in 1976 to 62 years in 2006) (Foot and Venne, 2011), a range of recent influences have kick-started a reversal of this trend. First, a reduction in the physical demands of jobs, along with improved health, has encouraged people to remain in the labour force longer. In addition to the phased-in raise in the eligible age for collection of Old Age Security (from 65 to 67), pensions that are calculated upon a lifespan of just 74 are no longer sufficient for the average Canadian who now lives 13 years longer than in 1976 (Foot and Venne, 2011). Finally, the economic downturn in 2008 induced a further delay in retirement by as much as 4.2 years in the U.S. (Age Wave, 2009).

As shown in the first column of Table 15, the age of retirement among the 268 retirees for whom age information is available (81% of all retirees) is illuminating and demonstrates an unanticipated high proportion of librarians retiring at or after age 65 (39%). These findings are especially surprising considering that between 1997 and 2002 just 18% of CARL librarians retired after age 64 (not shown in table), and that in 2004, 30% of senior librarians estimated that they would retire at or after age 65 (column 2, Table 15). Similarly, when comparing the proportion of librarians actually retiring before the age of 60 (22%) with the proportion planning to 'realistically' retire at this same early age, it appears that the 2008 to 2010 recession has tempered the early retirement hopes of at least some librarians; whereas in 2004, 37% of librarians expected to retire before the age of 60, just 10% had the same expectation in 2014. Overall, therefore, both the actual and predicted age of retirement data presented in Table 15 tells a story of delayed librarian retirement, findings that are important to consider when predicting future retirement rates.

**Table 15: Actual Retirement Age of 2003 to 2013 Retirees and Estimated Age of Retirement among Senior Librarians<sup>1</sup> in 2004 and 2014**

<b>Age of Retirement</b>	<b>Percent</b>		
	<b>Actual Retirement Age<sup>2</sup></b>	<b>Self-reported Estimation of Retirement Age</b>	
	<b>2003 – 2013</b>	<b>2004<sup>3</sup></b>	<b>2014<sup>4</sup></b>
	(n=268)	(n=142)	(n=79)
% Before 60	22	37	10
% Between 60 and 64	39	33	47
% At 65 and over	39	30	43

Sources: 8Rs 2013 Institutional Survey and 2004 and 2014 Practitioner Surveys

<sup>1</sup> Senior librarians are defined in the 2004 sample as those who are 50 years of age and over. Senior librarians for the 2014 sample are defined as those who received their MLIS before 1990.

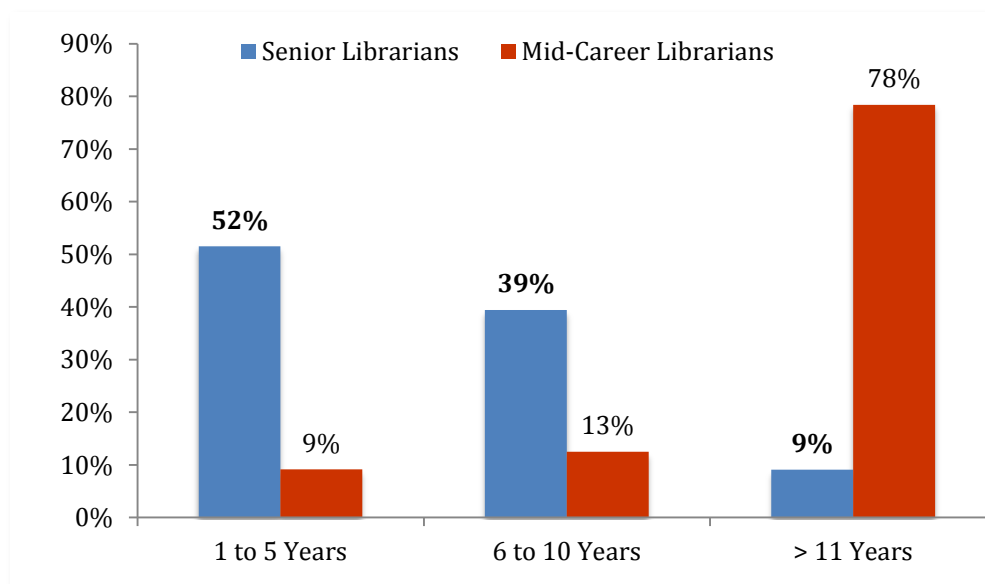
<sup>2</sup> Based on the actual age of retirement of 268 librarians who retired between 2003 and 2013 as reported in the 2013 Institutional Survey.

<sup>3</sup> Based on responses to the question, "At what age do you realistically think you will retire from your professional librarian career?" as reported by senior librarians in the 2004 Practitioner Survey.

<sup>4</sup> Extrapolated from mid-point of age response to the question, "How many more years do you realistically expect to work as a librarian before you retire?" as reported by senior librarians in the 2014 Practitioner Survey.

While the data in Table 15 are important, they only speak generally to the time period that CARL libraries can expect their librarians to retire. Figure 18 provides another way of looking at not only how many retirements are to come, but also when they are expected. Specifically, roughly half of the 25% of all librarians whom we define as 'senior', since they obtained their MLIS before 1990, expect to retire within the next 5 years, all else being equal. While there are a number of events that can influence these expectations of retirement timing one way or another, as discussed below, they do provide us with a benchmark idea of what is to come. Moreover, the figure highlights the fact that retirements almost entirely take place among the most experienced librarians, and that once again, retirements aren't as much about the number of librarians retiring as they are about the value of the experience and knowledge lost by those retiring.

**Figure 18: Retirement Timing Expectations<sup>1</sup>  
among Senior and Mid-Career Librarians<sup>2</sup>**  
(Senior librarians n=99; Mid-career librarians n=208)



Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses to the question "How many more years do you realistically expect to work as a librarian before you retire?"

<sup>2</sup> Senior librarians are defined as those who graduated from the MLIS program before 1990 and Mid-career Librarians are defined as those who graduated from their MLIS program between 1990 and 2008.

Still, converting these estimates of retirement expectations into numbers of librarians shows that 34% of all current librarians expect to retire within the next 10 years. As we will see in the next section on future retirements, this self-reported estimation is well within the realm of predictions based on current age.

In addition to the increasing age of retirement trend, the literature also points towards the oldest labour force cohort expressing a strong interest in flexible retirement options such as gradual reductions in hours or partial retirement. A survey of Canadians aged 55 years and

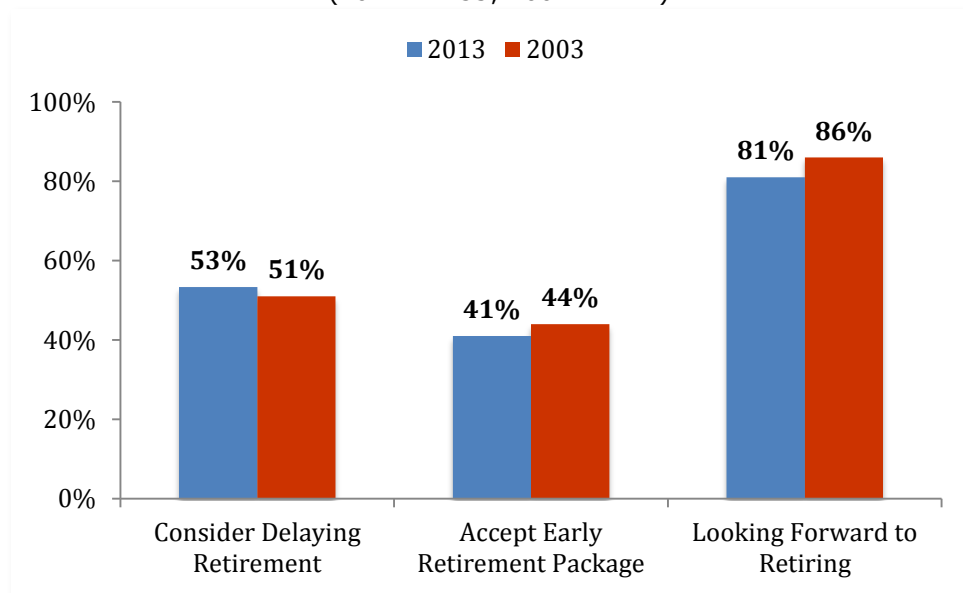


over found that nearly half would take either phased-in retirement (22%) or a shift to contractual work (26%) (RBC, 2008). These options would allow people to remain in the workforce longer, with the university educated the most likely to do so (Morissette et al, 2004).

Our findings are along the same lines. The 2013 Practitioner Survey asked librarians expecting to retire within the next 10 years if they were interested in a graduated retirement format where they gradually reduce their workload during the final years of work and 45% responded "yes."

As shown in Figure 19, a further 53% would consider delaying retirement, roughly the same proportion as in 2004 (51%). When these individuals were asked to specify "what conditions would make you consider delaying your retirement?", the most common response was for financial reasons (41%) followed by the desire to keep working at a satisfying job (23%).

**Figure 19: Retirement Contingencies and Interest among Librarians Planning to / Predicted to Retire within Next 10 Years by Survey Year<sup>1</sup>**  
(2014 n=135; 2004 n=221)



Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> 2014 respondents are those who plan to retire within the next 10 years and 2004 respondents are those who are at least 55 years of age and are therefore predicted to retire within the next 10 years.

At the same time, about 4 in 10 librarians would accept an early retirement package if it was offered. Only slightly more libraries (48%) offered librarians an early retirement plan and 28% offered a severance package in the past 5 years, but there is no evidence of libraries offering incentives to delay retirement other than the fact that 36% of libraries do not offer a pre- or post-retirement option, 41% offer pre-retirement only, and 23% offer both a pre- and -post-retirement option for a total of 64% offering a pre-retirement option to their librarian staff. These retirement policies may influence some individuals to change their retirement plans;

however, it is now broadly understood that individual financial circumstances often override such policies.

Finally, Figure 19 demonstrates that the vast majority (81%) of librarians are looking forward to retirement. While this is not surprising in itself, the stability of responses to these three questions across the past 10 years is quite remarkable and suggests that despite differences in economic contexts and in estimated ages of retirement between the two samples (Table 15), attitudes towards retirement have not changed.

## **Future Librarian Retirements**

The retirement results discussed so far illuminate what has happened in CARL libraries in the past 10 years. Predictions in the original 8Rs study were well within the 30% of librarians retiring. We did not predict, however, the 2008-2010 recession that has led to budget shortfalls and the attrition of some senior and middle management library positions. The restructuring of senior and middle management positions into entry-level positions is inferred from the data, however, the results are clear that roughly half of CARL libraries experienced difficulties in replacing the managerial and leadership skills of the remaining positions that were restructured or not renewed. The likelihood that retirements can result in replacing, restructuring, or attrition of positions is important to keep in mind as we examine future retirements.

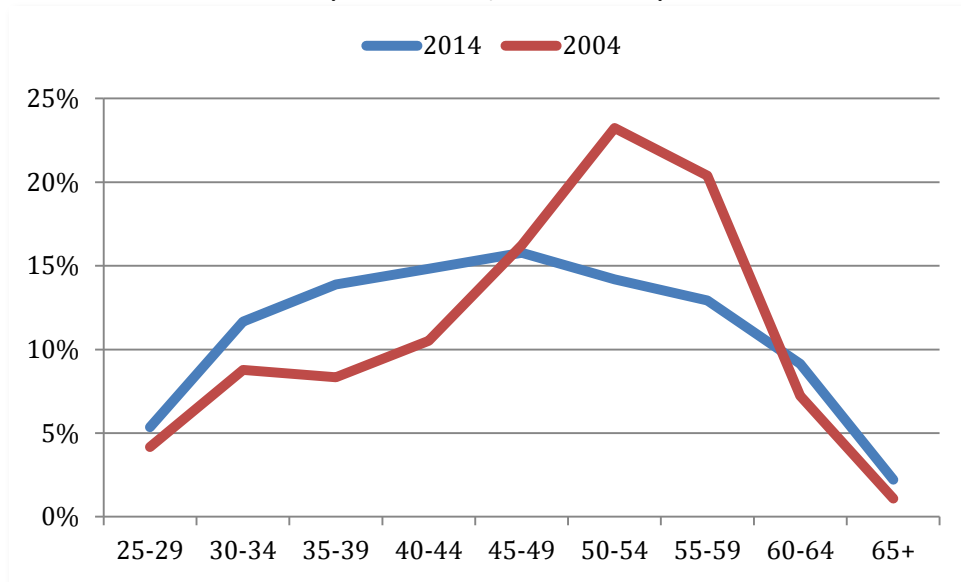
We have already noted in Chapter 3 (Figure 10) that librarians are significantly younger, on average, than they were 10 years ago. This is largely due to the injection of a less than 45 years-of-age cohort in the past decade, presumably from new hires, and signals an important reversal of a 25-year trend towards an aging profession.

Keeping in mind that the Practitioner Survey sample is marginally younger than the population of librarians, Figure 20 provides further evidence of a significant deceleration in the aging of CARL librarians. Looking first at the 2004 (red) curve, we can easily observe that the largest cohort of librarians falls within the 50-to-54 and 55-to-59 year-old age groups. This peaked shape has defined the age profile of librarians since 1986 at sequentially older intervals (Wilder, 2007). By 2014, however, the retirement of more than 300 librarians (Table 11), combined with the hiring of hundreds of new librarian recruits (362 new librarians in just the last 5 years; Table 24), has resulted in a significant flattening of the age distribution such that the percentage of 30-to-34 year-olds is now the same as the percentage of 55-to-59 year-olds (12% and 13%, respectively).

The trend data in Figure 20 support ARL research that shows a "youth" movement among Canadian academic librarians. Whereas Canadian ARL librarians were previously older than their American counterparts, between 2000 and 2005 the trend reversed due to retirements of older librarians and hiring of younger librarians, the latter to the extent that Wilder (2007) refers to the existence of a "hiring boom" in Canada. We caution against adopting this term

because the librarian population has increased by just a few percentage points in the past 10 years and due to the tempering effect of budget constraints on hiring as well as on replacing retired positions as discussed above.

**Figure 20: Age Distribution of Librarians by Survey Year**  
(2014 n=317; 2004 n=456)



Sources: 8Rs 2014 and 2004 Practitioner Surveys

More importantly, and as pointed out in the introduction of this chapter, retirements do not always result in skill shortages if they are combined with the hiring of younger workers, and especially if the younger workers are equipped with high-demand skill sets that older cohorts do not typically possess.

Drawing upon the same age data used in Figure 20, Table 16 presents the predicted rates of retirement in the next 5 and 10 years assuming minimum retirement ages of 60, 62, and 65. Based on the previous data on age of retirement that was presented in Table 15 and Figure 18 and the overall trends of an increasing retirement age, we can somewhat safely conclude that, all else being equal, the older age of retirement scenarios presented in Table 16 are more likely to accurately represent future retirements in CARL libraries. We conclude, therefore, that between 10% and 20% (113 and 225) of current librarians will retire in the next 5 years and between 25% and 35% (282 and 391 librarians) will retire within the next 10 years. Neither of these predictions are particularly alarming, especially since they do not depart significantly from what has already occurred in the past 10 years retirement wise (Table 11).

In fact, the similarity in the 10-year retirement rates between the two decades (of roughly 30% each) implies that retirements have occurred much more gradually than most predictions have specified. Table 16 also shows that as age of retirement increases not only do retirements decrease, but the likelihood of numerous retirements occurring within the next 10

years also decreases. Though estimates of a peak in retirement rates between 2010 and 2015 (Wilder, 2007) may still be somewhat accurate, a longer lens and an older age of departure suggests a more gentle pace of retirements and perhaps one that is much more manageable than would have been foreseen with the alarm bells that originally incited the 8Rs research program. As "Boom, Bust, and Echo" author and demographer David Foot concludes about Canada's aging labour force:

While there is no doubt that both the Canadian population and labour force are aging, the process is gradual (not abrupt), has been anticipated for many years, and can be handled with creative policies to ameliorate its impact (Foot and Venne, 2011).

**Table 16: Predicted Library Retirements within the Next 5 and 10 Years**  
(n=317)

<b>Minimum Retirement Age</b>	<b>Percent Librarians Retiring<sup>1</sup></b>	
	<b>Within 5 Years</b>	<b>Within 10 Years</b>
60 Years	27	38
62 Years	20	33
65 Years	11	24

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on current age.

The findings presented in Table 17 below, however, establish the important point that retirements will not likely occur uniformly across all types of librarian positions. Specifically, we observe that expected retirements increase as level of management increases. While just 18% of non-management librarians expect to retire in the next 5 years, fully 31% of middle managers and 35% of senior managers "realistically" expected to retire within this short-term time frame. These data introduce a noteworthy twist into an otherwise relatively smooth retirement trend especially in light of the difficulties that have been experienced in replacing the management and leadership qualities of retiring librarians (Tables 13 and 14).

**Table 17: Senior and Mid-Career Librarian Self-Reported Retirement Expectations in Next 5 and 10 Years by Managerial Level**  
(n=298)

<b>Managerial Level<sup>2</sup></b>	<b>Percent Librarians Retiring<sup>1</sup></b>	
	<b>Within 5 Years</b>	<b>Within 10 Years</b>
Non-management	18	38
Supervisors	12	36
Middle Management	31	49
Senior Administrators	35	58

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses to the question, "How many more years do you realistically expect to work as a librarian before you retire?"

<sup>2</sup> Middle Management includes such positions as department head. Senior Administrators include such positions as head / chief librarian, director, CEO or Assistant head / chief librarian, director, or CEO.

## **Succession Planning**

With these general retirement predictions and those for CARL management/leadership specifically in mind, we examine the succession planning practices of CARL libraries. It has already been noted that 6 in 10 institutional respondents felt that their lack of a succession planning strategy served as a barrier to replacing the competencies lost by retiring librarians (Table 14). This finding is not surprising considering that just 17% of libraries currently have a formal, long term (of at least 5 years) succession plan. Such a low incidence of succession planning is also commensurate with the results in Table 12 showing that external candidates replaced two-thirds of librarian retirements, although evidence suggests that at least some of these positions were restructured into introductory positions.

The sizeable gap between recognizing the importance of succession planning and the actual practice of such strategies is somewhat puzzling; however, it is important to note that this gap is not unique to CARL libraries. A survey by Galbraith et al (2012) of the succession planning attitudes and practices of 34 ARL libraries found a similar gap between the level of importance of succession planning and how well the plan was actually practiced.

At the same time, CARL libraries have just experienced the loss of 30% of their librarian workforce due to retirements and only one in five did so with a succession plan in place. Among the 17% of libraries that currently have a long-term succession plan, just half felt that it was adequate in replacing the competencies lost when senior librarians retired. As shown in Table 18, however, most libraries are performing a range of key practices that, taken together, could be viewed as a succession planning strategy. With three-quarters of libraries employing a "strategic plan that informs future human resources needs," the results further suggest that some succession planning is occurring in most CARL libraries, but not at a formally identifiable level and not to the extent that it readily enables the widespread replacement of the management and leadership skills held by senior retirees.

Given the rates of retirement expected and given that there have been calls for succession planning in the library community for at least 10 years, it is puzzling that CARL libraries are as equally unlikely to have such a plan now as they were in 2003. We can only presume that part of the reason must be because such plans are difficult to develop and perhaps even harder to practice. Alternatively, and as found by Galbraith et al (2011), succession planning is a rarity because other initiatives are more pressing. We might conclude, therefore, that succession plans are relegated down the list of the competing demands for human resources initiatives, in part, because they are more complicated and difficult to implement, and perhaps especially in a context in which the needed skills, knowledge, and abilities of the organization are in flux and where budgets are uncertain.

**Table 18: Succession Planning Practices**  
(n=24)

	<b>Percent Libraries<sup>1</sup></b>
<b>Formal succession-planning strategy</b>	<b>17</b>
<b>Elements of Succession Planning Strategy</b>	
Opportunities to keep librarians challenged and involved	92
Training to prepare librarians for more responsible positions	88
Identification of the key areas in library that require development	83
Strategic plan that informs future human resource needs	75
Identification of key people to groom/develop for future managers/leaders	58
Identification of desirable characteristics of managers and leaders	54
Mentoring to prepare librarians for more responsible positions	50
Regular review of adequacy of current librarians in meeting HR needs	42
Customized career path based on librarian unique talents and abilities	38
Process for transferring senior librarian knowledge to mid-level librarians	21

Source: 8Rs 2013 Institutional Web Survey

<sup>1</sup> Based on "Yes" responses to the question, "Does your organization practice any of the following?"

## Other Staff Retirements

Our examination of retirements has thus far focused on librarians. Indeed, very little research other than the original 8Rs research exists on the retirement of other library staff. We know from Figure 9, however, that of all permanent CARL employees, support staff tend to be the oldest and *other* professionals the youngest suggesting that retirements are most imminent for the former and least so for the latter.

The historical 2003 to 2013 retirement rates of *other* professionals and support staff, however, do not reflect these current age profiles (Table 19). With 35% of *other* professionals compared to just 23% of support staff retiring in the past 10 years, the implication is that *other* professionals were older than support staff in 2003. Given the relatively high turnover rate of *other* professionals (53 retired in the past 10 years; Table 19 and 111 hired in past 5 years; Table 23), the findings suggest a similar "youth" movement to that of librarians. Additionally, support staff may be choosing to retire at a later age than *other* professionals, perhaps out of financial necessity.

Another important observation to make about Table 19 is the difference in volume between the two types of staff. Whereas 701 support staff retired in the past 10 years (and 330 librarians; Table 11), just 53 *other* professionals left the labour force due to retirements. Thus, of the total 1,084 permanent CARL staff retiring in the past 10 years, 65% were support staff, 30% librarians, and 5% *other* professionals. This distribution is very close to the current distribution across the three types of staff (62%, 30%, and 8%; Figure 1), suggesting that though

historical retirement rates vary by as much as 15 percentage points between these types of staff, they have not been sufficient to offset the countering effects of recruitment.

**Table 19: *Other* Professionals and Support Staff Retirements in the Past 10 Years (2003 to 2013)**

(n=23)

<b>Other Professionals Retirements (FTE)</b>	<b>53</b>
Retirement rate (based on 150 in 2003)	35%
Average # retirements per library	2.5
Range of retirements per library	0 - 7
<b>Support Staff Retirements (FTE)</b>	<b>701</b>
Retirement rate (based on 2,992 in 2003) <sup>1</sup>	23%
Average # retirements per library	31
Range of retirements per library	6 - 112

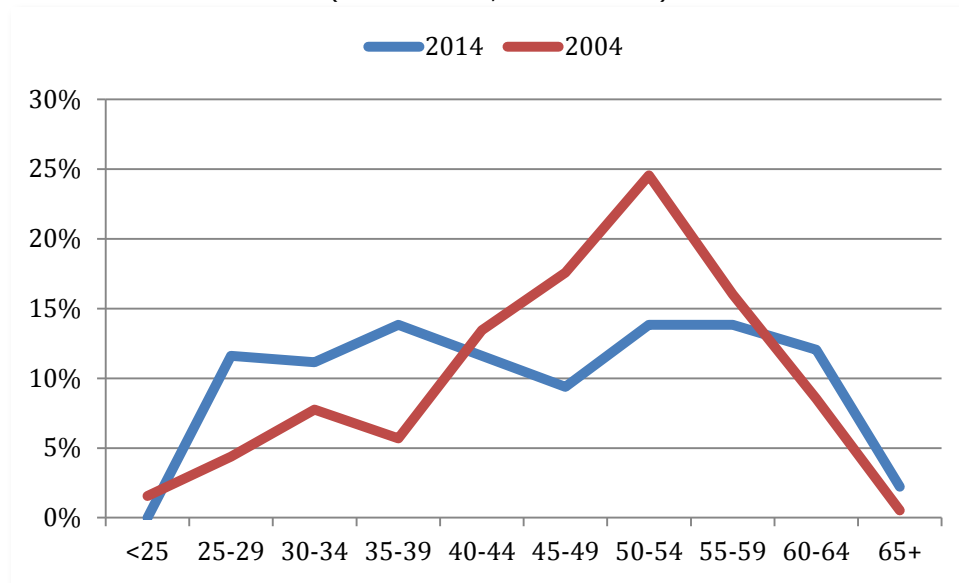
Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Number of support staff in 2003 is extracted from CARL 2003 – 2004 Statistics, Table VII, for the 23 participating libraries providing a response to this question in the 8Rs 2013 Institutional Survey.

Though we are unable to provide the 2003 to 2013 retirement rate for paraprofessionals, Figure 21 presents the comparative age line graph and Table 20 the corresponding predictions of retirement for this type of staff. The figure demonstrates that the age distribution of paraprofessionals has flattened out in the same way that it has for librarians (Figure 20) such that the percentage of 35-to-39 year olds is now the same as the percentage of 55-to-59 year olds (14%).

From the original 8Rs study we know that between 1997 and 2002, 76% of CARL libraries experienced paraprofessional retirements, for a total loss of 7% (compared to 100% of libraries losing 16% of librarians during the same 5-year period). Predictions for the future retirement rates of paraprofessionals made in 2003 were also slightly lower than for librarians (though they were still higher than for the Canadian labour force at large). When comparing the retirement predictions of paraprofessionals and *other* professionals presented in Table 20 with those of librarians already shown in Table 16, we observe very small differences up to a maximum of 4 percentage points, an insufficient amount to conclude that one group will retire at a faster rate than the other.

**Figure 21: Age Distribution of Paraprofessionals in 2004 and 2014**  
(2014 n=224; 2004 n=387)



Source: 8Rs 2014 Practitioner Survey

Comparisons between the predicted retirement rates of paraprofessionals and *other* professionals yield similarly nominal differences. The only exception to this pattern is the somewhat higher 10-year retirement rate for *other* professionals using the unlikely minimum retirement age of 60 (49% compared 41%). This finding is explained by the relatively high proportion of *other* professionals who are currently over the age of 50 to 54 (53% compared to 40%; Figure 22).

**Table 20: Paraprofessionals and *Other* Professional Predicted Retirements<sup>1</sup> within the Next 5 and 10 Years**

(Paraprofessional n=224; *Other* Professional n=51)

Minimum Retirement Age	Percent <i>Other</i> Professionals Retiring		Percent Paraprofessionals Retiring	
	Within 5 Years	Within 10 Years	Within 5 Years	Within 10 Years
60 Years	25	49	27	41
62 Years	22	37	23	35
65 Years	12	25	14	27

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on current age.

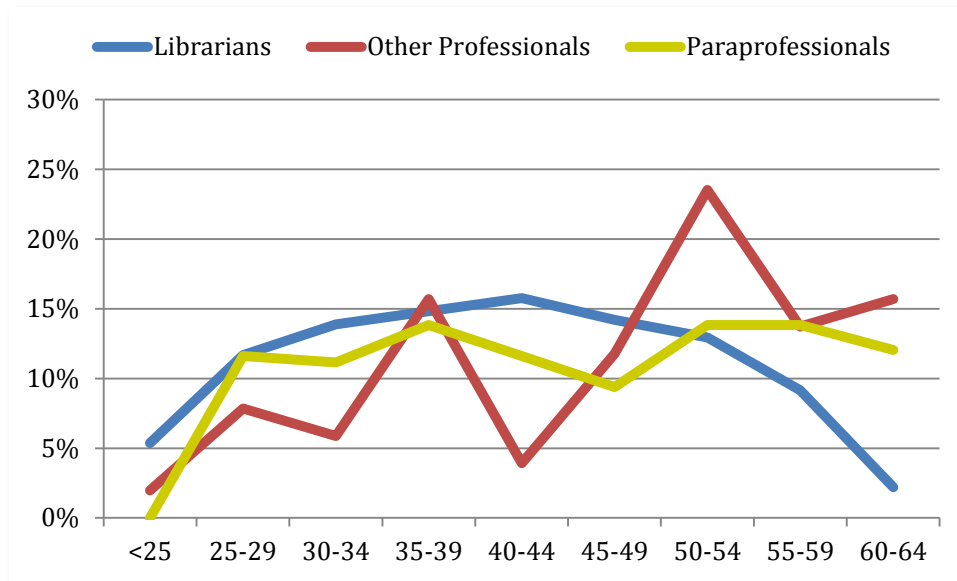
Figure 22 also demonstrates the rather erratic age distribution of *other* professionals, some of which may be explained by the smaller sample size of 51 individuals and the lower response rate of 21%. The twin peaks representing two larger age categories may also reflect hiring



surges with the 35-to-39 years of age peak indicating a more recent hiring trend and the 50-to-54 year old group representing a surge in hiring that occurred roughly 15-to-20 years ago.

**Figure 22: Age Distribution of Librarians, *Other* Professionals, and Paraprofessionals**

(librarian n=317; *other* professional n=51; paraprofessional n=224)



Source: 8Rs 2014 Practitioner Survey

## Summary of Major Findings & Conclusions

Minor differences are observed between the future retirement rates of librarians, *other* professionals, and paraprofessionals. This finding does not change the dominant story that despite a lack of formal succession planning (Table 18), CARL libraries have been dealing with retirements somewhat successfully in the past decade (Tables 13 and 14) and there is no reason to believe that they won't continue to do so in the future. At the same time, CARL libraries are well advised to consider the compound effects from the retirement of both professionals and paraprofessionals on the competency supply of their workforce, and the repercussions on the community's leadership from the departure of senior administrators, the largest group of departing librarians.

Overall, the study revealed that retirements are not inherently problematic and, in fact, are not a problem for the majority of CARL libraries since librarians do not appear to be (Table 11) and are not predicted to be (Table 16) retiring at alarming rates. As the typical age of retirement increases, the likelihood of having to deal with sudden peaks in retirements decreases. As well, some vacated positions have been restructured into introductory positions, giving the library an opportunity to inject newer and younger talent into their workforce. Even if retired positions are not restructured, replacement from outside the library can be an opportunity to effectively manage instances of resistance to change (Table 7). Retirement of librarians appears to be

more of a problem when it involves replacing the knowledge and skills associated with managerial and leadership competencies held by senior administrative positions (Table 13). Such skill shortages are especially of concern given the higher predicted retirement rates among middle management and senior administrators (Table 17).

The question is not if retirements are a problem, therefore, but under what circumstances they are a problem. The absence of formal succession-planning strategies (Table 18) specifically designed to target and groom upcoming managers and leaders is one such circumstance that warrants attention among CARL libraries. In addition further investigation into proven and viable succession planning practices for senior administrative positions should be considered.

Lastly, the youthful profile of CARL librarians not only signals a healthy rate of hiring, but since this hiring coincided with a shift in librarian skill demand it must also indicate that the community has already been capitalizing on the opportunity that retirements bring. In other words, to some extent retirements have allowed the CARL community to address the most pressing human resources issue of developing a workforce that possesses high demand skills.

### **Strategic Human Resources Planning Implications**

- Retirements have occurred gradually within the CARL population and to a large extent retirements have fuelled the recruitment of a new generation of the CARL library workforce. Retirements are predicted to continue at a similar pace to that experienced over the past decade and will continue to offer opportunity for renewal.
- As post-MLIS leadership and management training is deemed inadequate to replace competencies lost by retiring librarians (Table 14), CARL organizations must more closely define what this means and how to fill the vacuum left by retiring librarians. Entry-level to senior leadership institutes are more commonly offered in the USA and Canadian librarians can take advantage of them; however, it may also be timely to open a discussion of what CARL as a collective might do to enhance leadership and management competencies in the younger cohorts of CARL librarians.
- Is succession planning a viable human resources planning mechanism for CARL libraries? While formally practiced by a few, it does not seem to be a primary mechanism for replacing the management and leadership skills of senior retirees. However, as CARL libraries are practicing many elements of succession planning, it may be more feasible for libraries to examine these practices (Table 18) and to invest in or develop practices around the elements that work for their particular circumstances. This may be especially important for practices that focus on the succession of management and leadership competencies.
- The younger age profile of CARL librarians has implications for developing human resource management strategies that might be better aligned with the wants, needs, and sensibilities of younger populations. It is becoming a truism that younger workers seek

more balanced and meaningful work than they may have observed in their parents' generation, but this premise should be more closely scrutinized along with greater understanding of what this means within library organizations. Recent Canadian research has found, in fact, that the reverse is true with respect to meaningful work and that generation Y and baby boomers are more alike in their work values than they are different (Lowe, 2014). This may also be important as collective agreements are renegotiated for a younger population of workers.

## CHAPTER 7: PROFESSIONAL AND PARAPROFESSIONAL<sup>11</sup> POPULATION AND ROLE CHANGE

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### Introduction

Organizational restructuring is widespread in CARL libraries either by way of reengineering processes to improve performance and costs or by way of downsizing (Table 5). In thinking about the main drivers of these changes, including the introduction of new technologies and services or budget impacts (Table 6), there is no doubt that the functions required of staff have changed. Indeed, the challenges facing CARL library human resources have probably never been greater given the need to continuously rethink the organizational structure by addressing such questions as whether entirely new departments and staff are needed or whether demands can be met by restructuring and by training existing staff.

Such workforce development questions have in part been addressed by hiring a growing number of non-MLIS professionals, including, for example, subject matter experts, financial officers, facility managers, and information technology, communications, and copyright professionals. Stewart (2010) found that *other* professionals in U.S. research universities<sup>12</sup> increased their share of professional staff from 17.4% in 1998 to 19.7% in 2008.

The growth in *other* professionals has occurred as an initiative within individual libraries, but it has also been by design among the larger community of research libraries. The Council on Library and Information Resources (CLIR), for example, developed a Postdoctoral Fellowship program in 2003 designed to recruit newly-minted PhD holders to fill gaps in subject matter expertise. Brunner's (2009) review of the program found the CLIR Fellows to be especially suited to the new and evolving library since they know research collections and the latest trends in scholarship and have teaching experience. The program is not without its critics, however, who argue that it is "hastening" the replacement of librarians with *other* professionals (Crowley, 2004).

An important question left unanswered in the literature is whether the growth in *other* professional staff is at the expense of the professional librarian cadre or whether librarian roles are also changing to address emergent needs of the library. The primarily anecdotal literature on this issue tends to predict a future library workforce comprised primarily of non-MLIS professionals and support staff. Lewis (2010), for example, concludes that "most of the new members of academic library staffs will be other professionals" (p7). Other empirical research tends toward an interpretation of the data that elevates the significance of small changes. Based on the finding that among the 44% of libraries experiencing a loss of librarians between 2000 and 2008, 23% gained in the number of *other* professionals, Stewart (2010) concludes that "in many libraries, these increases in *other* professional staff have occurred as librarian

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<sup>11</sup> For definitions of librarians, *other* professionals, and paraprofessionals please see the Staff Classification Definitions text box at the beginning of Chapter 3.

<sup>12</sup> Includes 176 libraries classified as high or very high in research intensity.

staffing levels have decreased" (p399). The "many libraries" referred to amounts to just 25% of all libraries in the study (45 out of 176 libraries), a proportion that is difficult to imagine constituting a trend. Thus, while there is no doubt that the population of non-MLIS professionals is growing, it is not clear that this growth is due to the restructuring of librarian positions into *other* professional positions.

Another way of addressing the continuously changing organizational structure and budget-limited human resources in libraries is to shift certain librarian tasks to paraprofessionals. As librarians are increasingly required to perform such roles as teaching, collaborating and supporting research, some of their traditional tasks are necessarily transferred in whole or in part to paraprofessionals. The original 8Rs showed strong overlap between about one third of librarian and paraprofessional job functions, primarily around public service tasks. Other research echoes these snapshot findings (Buttler and Garcha, 1998; Cox and Myers, 2010); however, there is a lack of more definitive longitudinal research demonstrating that paraprofessionals are increasingly taking on professional roles. In examining changes in the task mix between librarians and paraprofessionals between the 2004 and 2014 Paraprofessional Surveys, we have attempted to ascertain whether there is evidence of such a long term trend.

The analysis begins by examining the relative growth in, and demand for, librarians, *other* professionals and paraprofessionals and then explores the data with respect to role overlap and role change.

### **Professional and Paraprofessional Population Change**

Before presenting the findings on population change, it is important to keep in mind the following considerations when interpreting the data. In attempting to develop data that are as exhaustive, comparable, and accurate as possible, CARL official statistics were utilized in a few instances when 8Rs data are missing. For the purposes of examining comparative populations, libraries that joined CARL after 2003 are altogether excluded in the population change data. As a result, the data are accurate representations of the respective populations of staff types, but they do not constitute a census. Only population data for staff categories that were gathered in both the 2003 and 2013 Institutional Surveys are presented in this section on staff change. This includes the total number of staff, librarians, *other* professionals, and paraprofessionals, and excludes non-paraprofessional support staff.

As shown in Table 21, between 2003 and 2013, the total number of all employees (including permanent, temporary, contract, and part-time) working in CARL libraries decreased by 7% (from 4,716 down to 4,365). Since all professional and paraprofessional staff grew in the last 10 years (by 11% in total), we can deduce that this loss is explained exclusively by a reduction in non-paraprofessional support staff. With professional and paraprofessional staffing increasing by a total of 213 and all staff decreasing by 351, it is inferred that non-paraprofessional support staff decreased by 564 individuals in the past 10 years. The decline in

non-paraprofessional support staff is likely a result of the gradual disappearance of lower skilled library work—work which is purported to never come back (Wilder, 2013).

Otherwise, Table 21 demonstrates that all three types of staff grew for a total 11% growth rate, with *other* professionals increasing the most (by 72%). At 3% and 4%, respectively, librarians and paraprofessionals grew by more moderate rates. These findings follow a similar pattern as in the U.S. where between 2000 and 2008, overall staffing levels decreased by -3.4%, *other* professionals increased by 30%, and librarians increased by 6% (Stewart, 2010).

**Table 21: 2003 to 2013 Population Change<sup>1</sup>**  
**All Staff, Librarians, *Other* Professionals, and Paraprofessionals**  
(n=24)

	Professionals & Paraprofessionals				
	All Staff	Total	Librarians	<i>Other</i> Professionals	Para-Professionals
2003 (FTE)	4,716	1,954	1,092	172	690
2013 (FTE)	4,365	2,167	1,125	295	721
Change (FTE)	-351	213	33	123	31
<b>Change (%)</b>	<b>-7%</b>	<b>11%</b>	<b>3%</b>	<b>72%</b>	<b>4%</b>

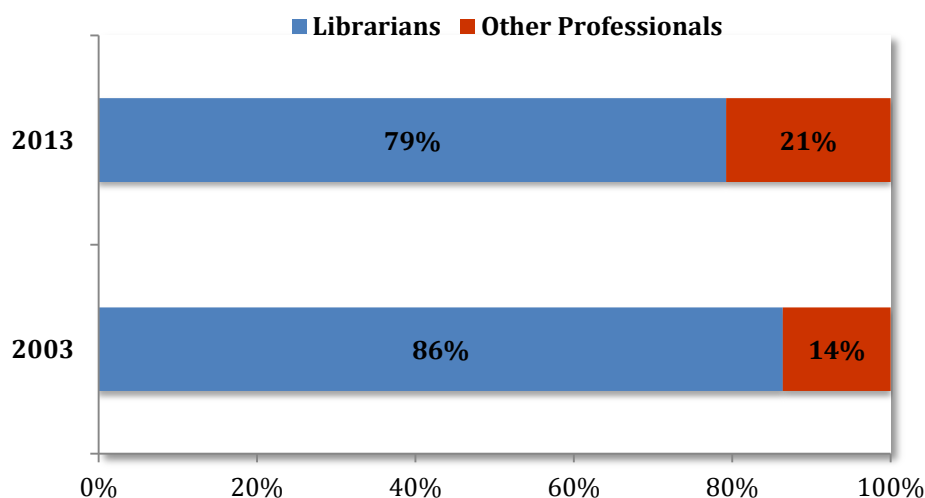
Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> To improve across time comparability, in a few instances CARL official statistics (Table 8) are used when 8Rs data are missing. Data are only included if there is information for the number of staff of a library for both 2003 and 2013, thus explaining the different 'n' sizes than is shown in Table 2. Given that CARL does not track the number of paraprofessionals and we are unable to make substitutions, the number of paraprofessionals is provided for just 17 libraries. Otherwise, data are provided for 24 libraries.

Interpretation of the percentage increase in *other* professionals presented in Table 21 must be made with caution given the comparatively small baseline number (172) used to calculate this change. A more instructive way of expressing the growth in *other* professionals is to examine their numbers as a percentage of all professionals as depicted in Figure 23. Specifically, whereas *other* professionals comprised 14% of all professionals in 2003, they comprised 20% in 2013, for an increase of 7 percentage points over a 10-year period. The composition of 20% *other* professionals in CARL libraries is very close to ARL's Annual Salary Survey 2013 – 2014 data which we calculate to be 22% of all 8,500 ARL professionals (ARL annual Salary Survey, Table 15).

**Figure 23: Librarian and *Other* Professional Population Distribution by Survey Year**

(2013 n=24; 2003 n=24)



Sources: 8Rs 2013 and 2003 Institutional Surveys

It is also important to understand that the 2003 to 2013 increases in professional and paraprofessional staff did not occur uniformly across the CARL library spectrum. Table 22 presents the over time population change in staff by partitioning out libraries that experienced an increase from those that experienced a decrease, and in doing so, points out the considerable amount of variation in population change within CARL libraries.

Beginning with the total workforce where we observed an overall decrease of -7% in Table 21, Table 22 reveals that 1 in 5 (19%) libraries experienced an increase in their total workforce of an additional 158 staff. It is also clear that with nearly 4 in 5 (79%) libraries undergoing an increase in their *other* professional population in the past 10 years compared to 3 in 5 (58%) experiencing librarian increases, not only is the percentage growth in *other* professionals greater than it was for librarians, but it has also been a more consistent trend across the scope of CARL libraries.

**Table 22: 2003 to 2013 Population Change Direction of Librarians, *Other* Professionals and Paraprofessionals<sup>1</sup>**  
(n=24)

	Population Change Direction				
	Increase		Decrease		No Change
	Percent Libraries	#FTE Staff	Percent Libraries	#FTE Staff	Percent
All Staff	19%	158	81%	-502	0%
Librarians	58%	83	38%	-50	4%
<i>Other</i> Professionals	79%	130	21%	-7	0%
Paraprofessionals	29%	143	64%	-112	7%

Sources: 8Rs 2003 and 2013 Institutional Surveys

<sup>1</sup> To improve across time comparability, in a few instances, CARL official statistics (Table 8) are used when 8Rs data are missing. Data are only included if there is information for the number of staff of a library for both 2003 and 2013, thus explaining the different 'n' sizes than is shown in Table 2. Given that CARL does not track the number of paraprofessionals and we are unable to make substitutions, the number of paraprofessionals is provided for just 17 libraries.

Table 22 also partly explains the reason why 9 in 10 libraries reported downsizing in the past 5 years (Table 5), despite the overall growth in the professional and paraprofessional workforce. Not only have CARL libraries reduced their support and contingent staff, but a significant minority (38%) also experienced a reduction in their librarian workforce and even more (64%) in their paraprofessional staff.

Finally, calculations (not shown in table or figure) provide mixed support for Stewart's (2010) conclusion discussed at the beginning of this chapter that non-MLIS professionals have gained in population size at the expense of the population size of MLIS professionals: among the 38% of libraries experiencing a decrease in their librarians over the past 10 years (Table 22), further calculations show that all 9 of them experienced an increase in *other* professionals. Specifically, these 9 libraries lost 50 FTE librarians and gained 27 FTE *other* professionals. At the same time, however, among the 21% of libraries that underwent a loss of *other* professionals (Table 22), 3 libraries increased their librarians by 20.5. In addition, the most common scenario experienced by 48% of libraries was to have increases in both librarians and *other* professionals. Thus, though there is a discernable trend of decreasing librarians in libraries that have experienced increases in *other* professionals, it is by no means widespread or even typical in CARL libraries.

These population changes are due to retirements, which have already been examined in Chapter 6, and recruitment, data for which is presented in Table 23. Given that CARL libraries did not find it noticeably more difficult to hire librarians than they did in the past (Table 8), it is also instructive to contextualize these findings by understanding just how much recruiting has occurred. While Tables 21 and 22 provide some hints as to what this hiring might have looked like, Table 23 demonstrates that a total of 1,059 new permanent staff members were hired



between 2008 and 2013. This figure represents nearly one-third (28%) of the current CARL workforce suggesting a robust and healthy human resources climate despite the attenuating effects of budgets, hiring freezes, and downsizing. The data are also of little surprise given the 30% retirement rate in the past 10 years.

Table 23 also shows that the distribution of new hires is very close to the distribution of staff. In other words, hiring rates tend to mirror the proportional size of each type of staff. That the hiring rate of librarians of 34%, for example, is marginally higher than their share of staff (30%) is not a sufficient difference with which to draw meaningful conclusions.

**Table 23: Professional and Paraprofessional Newly Recruited and Current Distributions**

(n=24)

	<b>Newly Recruited (2008 – 2013) Staff Distribution</b>	<b>Current Staff Distribution</b>
	(1,059)	(3,759)
Librarians	34% (362)	31% (1,125)
<i>Other</i> Professionals	10% (111)	8% (300)
Support Staff	55% (586)	60% (2,154)

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Source: 8Rs 2013 Institutional Survey

On the other hand, it is notable that despite that the number of *other* professionals increased by the largest percentage between 2003 and 2013, they represented just 10% of all new library staff members hired between 2008 and 2013. We, therefore, hesitate to conclude as others have done about the U.S. situation (Lewis, 2010), that Canada's largest academic libraries are heading towards a future dominated by *other* professionals.

Growth in the number of professional staff positions may be a result of reclassifying an existing position from one staff category to another or by creating an entirely new position. Table 24 presents the proportion of 2008 to 2013 recruitments that were hired into existing positions, into restructured positions, or into newly created positions for librarians and *other* professional staff. The results suggest that the growth in *other* professionals has not, by and large, been due to the restructuring of existing positions (7%), but is more likely to have been a result of the creation of new positions (57%). While librarian growth is also more likely to be from the

creation of new positions (36%) than from restructured positions (9%), overall growth from both sources combined was lower among librarians than among *other* professionals (45% compared to 64%), thus explaining the higher rate of population growth among *other* professionals. In other words, overall, Table 24 provides further evidence of the magnitude of change that has been occurring at CARL libraries and the extent to which the demand for a skilled and flexible workforce is being met with new staff in new or restructured positions. The hiring of more than 1,000 new staff members in the last 10 years combined with the finding that half of the new professional hires either involved the creation of new positions or the restructuring of old ones suggests a highly active CARL library human resources climate.

**Table 24: Newly Recruited Professional Staff (2008 to 2013)  
by Type of Position Hired into**  
(n=25)

	<b>Librarians</b>	<b><i>Other</i> Professionals</b>
<b>Distribution of New Hires</b>	<b>77%</b> (362)	<b>23%</b> (111)
<b>Type of Position</b>	<b>266</b>	<b>104</b>
Hired into existing position	55%	37%
Hired into significantly modified position <sup>1</sup>	9%	7%
Hired into new position	36%	57%

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on the number of "new hires into positions substantially changed in focus for the purposes of recruitment."

The increase in professional and paraprofessional populations at most libraries is no surprise when examining institutional responses about the extent to which they experienced an increased need for these staff. As shown in Table 25, close to 9 in 10 libraries reported having both a need for more librarians and a need for more *other* professionals in the past 5 years to a moderate or great extent. Though a slightly smaller number of libraries felt this way about librarians in 2013 than in 2003, decreases in the percentage of libraries indicating that the need for librarians will increase in the next 5 years are more noteworthy (from 96% in 2003 down to 77% in 2013), as are claims for increasing needs for paraprofessionals (from 81% down to 57% in 2013).

**Table 25: Past and Future Increased Demand for Professional and Paraprofessional Staff by Survey Year**  
(n=22)

<b>Libraries reporting increased need over the past 5 years to a moderate / great extent<sup>1</sup></b>	<b>Percent</b>	
	<b>2013</b>	<b>2003</b>
For more librarians	86	96
For more <i>other</i> professionals	90	n/a
For more paraprofessionals	84	81
<b>Libraries reporting need will increase over the next 5 years to a moderate / great extent<sup>2</sup></b>		
	<b>2013</b>	<b>2003</b>
For more librarians	77	96
For more <i>other</i> professionals	90	n/a
For more paraprofessionals	57	81

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup>Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question, "To what extent have the following changes in staffing needs of your library occurred in the past 5 years?"

<sup>2</sup>Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question, "To what extent do you think the following changes in staffing needs will occur at your library over the next 5 years?"

The results presented in Table 25 are in line with the respective population changes that have occurred in the past 10 years for librarians, *other* professionals, and paraprofessionals. More, importantly, however, they suggest a continuation of these same changes and therefore signal a longer term trend in the shifting composition of professional and paraprofessional staff in most CARL libraries.

Once again, however, it must be remembered that *other* professionals comprise less than 10% of all CARL library staff and there is but little evidence that this staff type is increasing while other staff are decreasing. Rather, with all three types of staff increasing, it is more a matter of *other* professionals increasing at a faster rate and at a greater number of CARL libraries.

### **Librarian and *Other* Professional Role Overlap**

It is important to try to understand the reasons for such a shift, and in this regard, we take a look at what lays behind the increased demand for *other* professionals and what this expanding staff corps looks like.

Why *other* professionals are growing in demand is a question without simple answers. As Stewart notes (2010; 399), "[T]he connection between the role played by these non-librarian professionals and the core mission of the library is not always clear." Since *other* professionals are performing such a wide range of roles and functions (Tables 26 and Appendix 6), moreover,

it stands to reason that different root causes lay behind different role sets. Indeed, when institutional respondents were asked to provide the main reason why their need for *other* professionals had increased in the past 5 years, the introduction of new technology emerged as the only dominant answer provided by less than one-third (5 of the 18) of responses provided. Other responses focused on the introduction of new services (i.e. learning commons, research support services) or on the need to be more effective in operations (i.e. finance, human resources, business, fundraising).

Left unanswered is whether or not these needs have ever, or could ever, be met by reskilling librarians or whether they will always be within the purview of non-MLIS professionals. In other words, it is not clear to what extent the increase in *other* professionals signals the unsuccessful role change of librarians and to what extent it represents library structural change to meet a need that has little to do with librarians. Examination of the overlapping roles of MLIS and non-MLIS professionals suggests that both scenarios are probably true. But what roles, exactly, are *other* professionals playing in the library?

Keeping in mind that one library does not have any *other* professionals, Table 26 provides the percentage of all libraries employing each type of *other* professional and the percent distribution across all types of *other* professionals. The majority of libraries (96%), but not all, employ *other* professionals. A quick glance down the second column demonstrates a wide range in the types of *other* professionals with even the largest category of information technology professionals comprising less than one-third (31%) of all professionals. The relatively high proportion of *other* professionals who are working as supervisors (14%) might be indicative of librarian's low interest in performing these roles (Table 36). The relatively small proportion of subject matter experts (3%) falls short of a trend towards "hastening" the replacement of librarians with *other* professionals (Crowley, 2004).

Institutional respondents were also asked to provide the job titles of new *other* professional positions established in their library in the past 5 years, up to a maximum of three. The findings presented in the third column of Table 26 are an indication of the positions created for the 63 *other* professional recruits who were hired into newly created positions (Table 24) as well as a possible measure of functional areas of growth in CARL libraries.

Once again, the results depict a wide range of roles with information technology positions comprising the most common response (17%). Otherwise, it is notable that communications professionals and copyright specialists each comprise more than 1 in 10 new *other* professional positions (column 3) despite that they comprise only 4% and 3%, respectively, of all *other* professionals (column 2). Thus, though these two jobs are not common, they appear to be emerging as growing functional needs in CARL libraries. Collections professionals, which institutional respondents were not directly asked about, but arose as a type of new *other* professional (includes the acquisitions, management, and preservation of collections in all formats, including special collections), also comprise 11% of newly created positions.

**Table 26: Libraries with *Other* Professionals and Distributions of Current and New Types of *Other* Professional Positions**

Type of <i>Other</i> Professional	Percent	Percent Distribution	
	Libraries with <i>Other</i> Professionals	Current <i>Other</i> Professionals	Newly Created <i>Other</i> Professional Positions <sup>1</sup>
	(n=25)	(n=298)	(n=47.5)
Information Technology Professionals	76	31	17
General Staff Supervisors / Managers	56	14	8
Archivists	52	13	8
Business / Finance Professionals	64	7	3
Student Success Professionals	16	7	2
Human Resource Professionals	40	5	7
Facilities Professionals	44	4	1
Communications Professionals	28	4	13
Development (fundraising) Professionals	36	4	2
Subject / Content Experts with PhD	16	3	4
Copyright Specialists	32	3	11
Statistical / Data Analysts	40	3	4
Museum professionals	4	1	0
Collections professionals <sup>2</sup>	n/a	n/a	11
Other	n/a	n/a	8

Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on categorized responses to the question, "Please provide new *other* professional positions (to a maximum of 3) established in your library in the past 5 years."

<sup>2</sup> Respondents were not asked to provide the number of collections professionals, but it emerged as a type of newly created position and includes such roles as digital preservation officer, GIS specialist, and manager of collection development.

Institutional respondents were also asked to provide information about new librarian positions established in the past 5 years, up to a maximum of 3. These results provide an indication of the type of newly created jobs that the 130 FTE recruited librarians were hired into (Table 24) and, as is the case for new *other* professional positions, an indication of emerging functions of CARL libraries. Tabulated results into the same 6 classifications used in Figure 24 are presented in Appendix Table 5.

An examination of Appendix Table 5 and Table 26 reveals that new librarian positions and new *other* professional positions are both increasingly oriented towards specialist roles.

Furthermore, when comparing new librarian positions established within the last 5 years, and new *other* professional positions, there appears to be a large amount of overlap. For example, both new librarian positions and new *other* professional positions include GIS, digital preservation, and copyright. These are also identified as common specialized functions that librarians are increasingly required to perform (Appendix Table 7).

Table 27 presents librarian responses to questions about whether their roles are becoming more blurred or overlapped with *other* professionals. With just 20% agreeing that they are currently required to perform more *other* professional tasks, the evidence that librarians are performing more *other* professional roles is not strong. Though twice as many (40%) of librarians agree that their role is increasingly becoming blurred with that of *other* professionals, just 25% felt this was something to be concerned about.

**Table 27: Indicators of Librarian and *Other* Professional Role Overlap**

(n=22)

	Percent
<b>Libraries Agreeing that "Compared to 5 years ago . . ."¹</b>	
Librarian role is increasingly becoming blurred with the role of <i>Other</i> Professional Staff	40
<b>Senior and Mid-career Librarians Agreeing that "Compared to 5 years ago, I am currently . . ."²</b>	
Required to perform more tasks once done by <i>Other</i> Professionals	20
More concerned about the blurring of my professional role with the role of <i>Other</i> Professionals	25

Sources: 8Rs 2013 Institutional Survey and 2014 Practitioner Survey

¹Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question, "To what extent have the following changes in staffing needs of your library occurred in the past 5 years?"

²Based on responses of 4 or 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question, "To what extent do you agree with the following statements about how your job has changed in the past 5 years?"

Yet, another way of comparing the roles of librarians and *other* professionals is to examine their respective job classifications using the definitions presented in the text box below and as presented in Figure 24. The figure reveals that while librarians are more heavily concentrated in public services (55% work in such areas as reference, circulation, reserve, instruction, liaison, and learning commons, and other support activities), the work of *other* professionals is spread more evenly across the 5 job classifications, a finding that echoes the breadth in the type of *other* professionals presented in Table 26.

Interestingly, however, librarians are similarly as likely as *other* professionals (19% compared to 23%) to be working in management positions where they may be responsible for budgets and personnel, overseeing operations, or instituting policies and accountability measures. These findings are supported by Appendix Table 6 which shows that a significant and similar proportion of librarians and *other* professionals are performing management and administrative tasks (51% and 49%, respectively).<sup>13</sup>

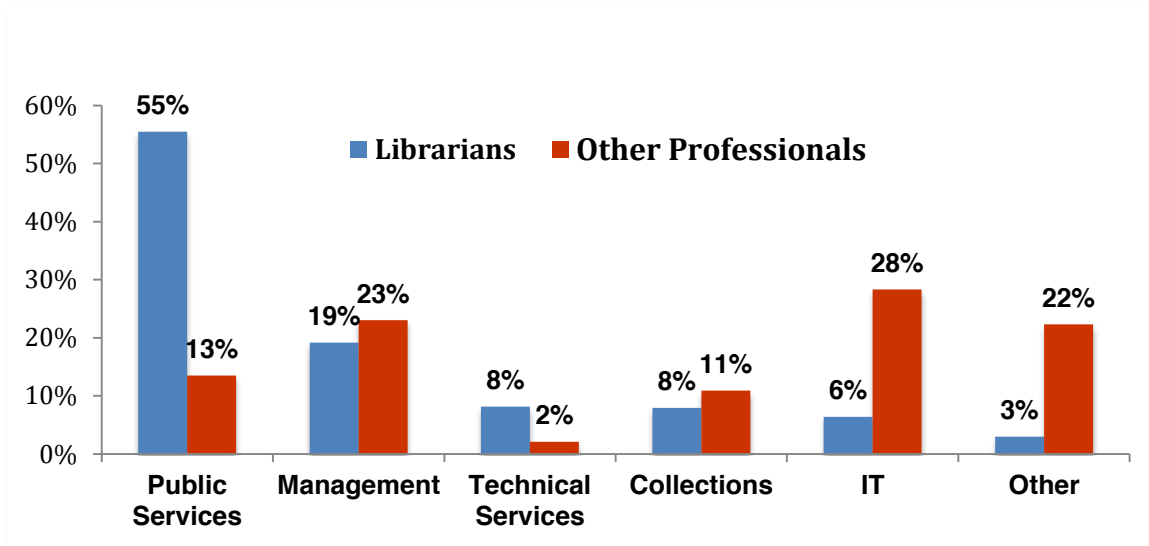
<sup>13</sup> The table is placed in the Appendix because we are less confident of these findings than the institutional ones, given that the former consist of a relatively small other professional sample size (57) that is applied to a wide range of possible tasks.

Otherwise, Figure 24 provides only a marginal amount of evidence that the roles of librarians and *other* professionals are overlapping. Without longitudinal data on these job classifications, moreover, we are unable to more definitively determine the extent to which role overlap is increasing.

Job Classification Definitions	
<b>Public Services:</b>	includes reference, circulation / reserve, instruction, liaison, learning commons, and support activities
<b>Management:</b>	responsible for budgets and personnel, overseeing operations, and instituting policies and accountability measures
<b>Technical Services:</b>	includes cataloguing / metadata, acquisitions, and support activities
<b>Collections:</b>	includes acquisitions, management and preservation of collections in all formats, including special collections
<b>Information Technology (IT):</b>	includes digital and web services
<b>Other Staff:</b>	Includes staff who do not fit into any of the five categories provided above

**Figure 24: Job Classification of Librarians and *Other* Professionals**

(n=22)



Source: 8Rs 2013 Institutional Survey

### Librarian and Paraprofessional Role Overlap and Role Change

As already mentioned, the original 8Rs showed strong overlap between about one third of librarian and paraprofessional job functions, primarily around public service tasks. Table 28 presents institutional indicators of a librarian / paraprofessional role shift. Fully 84% and 85% of institutional respondents reported that their demand for paraprofessionals to perform tasks once done by librarians has increased in the past 5 years and will continue to do so over the

next 5 years to a moderate or great extent. Hence, the trend of paraprofessionals taking on roles of professional librarians has continued since the late 1990s, and it looks like it will continue at least for another 5 years.

**Table 28: Indicators of Role Shift from Librarians to Paraprofessionals**  
(n=22)

Statement	Percent Libraries Reporting to Moderate / Great Extent	
	2013	2003
The need for Paraprofessionals to perform tasks once done by Professional Librarians <u>has increased in the past 5 years</u> <sup>1</sup>	84	84
The need for more Paraprofessionals to perform tasks once done by Professional Librarians <u>will increase over the next 5 years</u> <sup>2</sup>	85	84

Sources: 8Rs 2013 and 2003 Institutional Surveys and 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question, "To what extent have the following changes in staffing needs of your library occurred in the past 5 years?"

<sup>2</sup>Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent" to the question, "To what extent do you think the following changes in the staffing at your library needs will occur at your library over the next 5 years?"

The extensive data presented in Table 29 are based on librarian and paraprofessional responses to both the 2014 and 2004 Practitioner Surveys asking how often each task is performed. The table presents the percentage of respondents indicating that they are performing the task "sometimes" or "frequently" and the percentage point change from 2004 to 2014. Among the many data points presented in the table, a few findings are especially noteworthy.

Beginning with the tasks performed by librarians, the table demonstrates that, along with Figure 24, public service-and outreach-related tasks are the most likely to be performed by librarians. Three of the four tasks listed under public service, moreover, are performed by approximately two-thirds of librarians at least some of the time. Though programming and services to special populations is performed to this degree by just 2 in 5 librarians, this task has increased by the greatest amount of any task on this very large table (by 18 percentage points). The results suggest that the increase is due to the addition of new programming or services.

A wide range of administrative-and management-related tasks are also performed by many librarians. With the exception of fundraising, each of the 11 individual tasks are performed by a minimum of one-third of respondents and 7 of the 11 tasks are performed by at least half of librarian respondents. Furthermore, two-thirds of librarians are performing high level administrative tasks such as organizational planning and decision-making and policy development. Fully three-quarters (74%) of librarians, nearly half (48%) of paraprofessionals, and 75% of *other* professionals (Appendix Table 6) staff are performing tasks related to training and development at least "sometimes." Thus, not only is a large share of the human



resources at CARL libraries devoted to a wide range of management and high level administrative tasks, but also these tasks are often in the service of meeting the human resources challenge to continually develop a skilled workforce.

Like their professional counterparts, many paraprofessionals are performing public service and outreach tasks and increasingly instruction in library use, resources and research (from 55% to 65%). Other task increases for paraprofessionals that signal a shift toward typical librarian responsibilities are observed for collection development, evaluation, and management (from 26% up to 35%) and library systems hardware and support (from 18% to 28%). The biggest shift for paraprofessionals, however, is their increased participation in conferences and workshops (from 38% to 54%) and in professional organizations (from 19% to 30%). Whether this increased participation is due to paraprofessionals taking greater initiative, or whether it stems from increased organizational funding (or both), is unclear. In either case, the shift is noteworthy.

Overall, the table demonstrates the wide range of tasks that are being performed by both librarians and paraprofessionals, which in itself indicates a degree of role overlap. Otherwise, the data over time illustrates a fair amount of stability between 2004 and 2014. Of the 43 individual tasks for both professionals and paraprofessionals, we observe just 5 tasks changing by more than 10 percentage points in the past 10 years.

**Table 29: 2004 to 2014 Change in Task Performance among Librarians and Paraprofessionals**

Task	Percent Performing Task at Least Sometimes <sup>1</sup>					
	Librarians			Paraprofessionals		
	2014	2004	Change	2014	2004	Change
<b>Professional Development / Participation</b>	<b>89</b>	<b>83</b>	<b>6</b>	<b>42</b>	<b>29</b>	<b>13</b>
Attendance at conferences and workshops	94	88	6	54	38	16
Participation in professional organizations	85	79	6	30	19	11
<b>Public Service and Outreach</b>	<b>61</b>	<b>57</b>	<b>4</b>	<b>44</b>	<b>43</b>	<b>1</b>
Reference, information service, & research support	69	69	0	65	60	5
Instruction in library use, resources, & research	64	63	1	65	55	10
Liaison activities	67	72	-5	27	34	-7
Programming & services to special populations	41	23	18	21	23	-2
<b>Administration and Management</b>	<b>51</b>	<b>53</b>	<b>-2</b>	<b>20</b>	<b>19</b>	<b>1</b>
Training and development	74	72	2	48	45	3
Organizational planning & decision-making	66	70	-4	24	29	-5
Policy development	65	68	-3	21	21	0
Assessment and evaluation	65	n/a	n/a	15	n/a	n/a
Supervision and evaluation of personnel	55	58	-3	28	26	2
Managing library units/activities	54	58	-4	21	21	0
Marketing, communications, & public relations <sup>2</sup>	53	46	7	18	11	7
Human resources planning & management	45	48	-3	13	11	2
Budgeting & financial management	42	47	-5	12	9	3
Managing space, facilities, & building operations	33	39	-6	12	11	1
Fund-raising & donor support	15	18	-3	4	5	-1

Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question, "How often do you perform each of the following job functions?" Section subtotals are averages of all tasks under that section.

<sup>2</sup> The 2004 survey only asked about marketing and public relations.

Table 29 Cont'd

**Table 29 Cont'd**  
**Percent Performing Task at Least Sometimes<sup>1</sup>**

Task	Librarians			Paraprofessionals		
	2014	2004	Change	2014	2004	Change
<b>Research and Publication</b>	<b>42</b>	<b>40</b>	<b>2</b>	<b>4</b>	<b>3</b>	<b>1</b>
Conducting literature reviews	53	n/a	n/a	3	n/a	n/a
Analyzing data	48	n/a	n/a	10	n/a	n/a
Presenting research results	46	n/a	n/a	3	n/a	n/a
Conducting quantitative or qualitative research	44	n/a	n/a	7	n/a	n/a
Publishing results of research	38	n/a	n/a	2	n/a	n/a
Writing research proposals	38	n/a	n/a	2	n/a	n/a
Developing methodology for a research program	31	n/a	n/a	1	n/a	n/a
<b>Collections</b>	<b>27</b>	<b>28</b>	<b>-1</b>	<b>19</b>	<b>13</b>	<b>6</b>
Collection development, evaluation & management	65	69	-4	35	26	9
Curation of collections	26	n/a	n/a	16	n/a	n/a
Copyright clearance & IP permissions*	19	11	8	14	12	2
Preservation of collections	19	n/a	n/a	25	n/a	n/a
Electronic licensing	18	19	-1	6	6	0
Digitization of collections	17	13	4	15	8	7
<b>Information Technology</b>	<b>22</b>	<b>26</b>	<b>-4</b>	<b>16</b>	<b>13</b>	<b>3</b>
Web development & applications	32	43	-11	16	13	3
Library systems, hardware & software support	28	29	-1	28	18	10
Digitization or digital preservation initiatives	22	n/a		11	n/a	n/a
Database creation & maintenance	15	20	-5	9	12	-3
Network management and technical support	11	12	-1	15	10	5

Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question, "How often do you perform each of the following job functions?" Section subtotals are averages of all tasks under that section.

Table 29 Cont'd

**Table 29 Cont'd**  
**Percent Performing Task at Least Sometimes<sup>1</sup>**

Task	Librarians			Paraprofessionals		
	2014	2004	Change	2014	2004	Change
<b>Technical and Bibliographic Services</b>	<b>11</b>	<b>13</b>	<b>-2</b>	<b>35</b>	<b>36</b>	<b>-1</b>
Cataloguing, database management & organization of information resources	20	34	-14	35	45	-10
Circulation & discharge of library materials	18	13	5	53	46	7
Creation & maintenance of bibliographic records	17	25	-8	43	47	-4
Acquisition, receipt, & payment of library materials	11	11	0	31	26	5
Sorting, shelving, & filing of library materials	8	5	3	45	44	1
Processing interlibrary loan requests – borrowing & lending	6	9	-3	28	31	-3
Repair & conservation of library materials	4	4	0	23	21	2
Bindery & materials processing	3	4	-1	23	24	-1

Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question, "How often do you perform each of the following job functions?" Section subtotals are averages of all tasks under that section.

## Summary of Major Findings & Conclusions

Since the total number of CARL employees decreased by 7% and all professional and paraprofessional staff increased by 11% (Table 21), we can deduce that the total population decline in the past 10 years was due to reductions in non-paraprofessional support staff. *Other* professionals increased at the greatest rate, but by only 6 percentage points as a proportion of all staff, and increases did not occur at all libraries. Increases in the population of *other* professionals were found to be a result of creating new positions much more so than they were from restructuring existing positions (57% compared to 7%; Table 24). As might be expected, many of these new positions were in IT, but the data show that *other* professionals are performing a wide range of roles in CARL libraries among which IT, communications, and copyright professionals are growing the most noticeably (Table 26). More importantly, many of these new *other* professional positions have similar titles to newly-created librarian positions (Appendix Table 5). The conclusion is that while librarians continue to predominantly hold jobs in public services, and *other* professionals dominate IT jobs, these two professional staff groups are increasingly fulfilling many of the same functional needs of CARL libraries, needs which progressively require specialized skills (Table 30).

The results suggest also suggest that the expansion of non-MLIS professionals is a small trend in CARL libraries, but one that will likely continue. Given the wide range of roles played by *other* professionals and given that the reasons for hiring *other* professionals rests upon a similarly wide range of causes, predictions about their future rate of growth are beyond the scope of the *8Rs Redux* data, but should continue to be followed.

It is not within the scope of this report to weigh in on whether the increase in *other* professionals is a positive or negative change; however, to the extent that the increase is in response to emerging needs of the library that might otherwise be left unfilled, one must conclude that the influx is filling a functional role. Wilder (2007b) aptly captures the benefits and challenges associated with this trend in the following quote:

[T]he nature of scholarship and higher education has changed in ways that present academic libraries with challenges that did not exist 20 years ago and libraries deserve credit for finding the creativity and resources to meet those challenges quickly and effectively . . . [Yet, he adds] As the size and influence of the non-traditional professionals grow . . . administrators would do well to think about the traditional expertise in their ranks--expertise that, in many respects, responds to timeless values that lie at the heart of our profession. (p5)

The evidence of a continued shift in paraprofessionals performing librarian roles is also not strong (Table 29), despite that the vast majority of institutional respondents indicated that role shift had occurred and would continue to occur (Table 28). Indeed, the stability in tasks across time for both librarians and paraprofessionals is somewhat unexpected and suggests that perhaps the bulk of the change resulting from new technology occurred before 2004. Alternatively, the inability to detect change may be a function of the level of detail in the description of the tasks themselves. Thus, though the same proportion of librarians in 2003 and 2013 are performing reference, information services, and research support to faculty and

students (66%; Table 29), the ways in which these tasks are being performed has changed. To the extent that new technologies are informing nearly everything that is done in the library, change is thus best measured in terms of "how" and not "what." CARL itself notes that

"The essential role of the CARL librarian has not changed. Regardless of his or her specific position, the librarian's central mandate continues to be bringing information seekers and information sources together." (Core Competencies of the 21<sup>st</sup> Century: CARL librarians, p4).

The stability of over-time findings presented in Table 29 thus serves as a reminder that while there are new ways of doing the same thing and, even though the scholarly environment for doing so has changed dramatically, the core role of librarians remains unchanged, as does that of their paraprofessional counterparts.

### **Strategic Human Resources Planning Implications**

- The composition of the CARL workforce should continue to be monitored as there is evidence of shifts in numbers of librarians, *other* professionals, and support staff, and some continuing evidence of role change, without a clear picture of whether these are significant or long term trends.
- The numbers of support staff in CARL libraries has decreased and this trend is likely to continue as support staff retire and are not replaced. As a result, the role of support staff needs to be examined within CARL libraries and their support skills and competencies assessed and defined for the future.
- Paraprofessionals continue to provide a valuable role in CARL libraries and there continues to be a fair degree of role overlap with librarian colleagues. CARL libraries should continue to assess the needs of the organization and level of job responsibility with the object of creating or re-aligning positions that are challenging for paraprofessionals and professionals alike and acknowledge their distinct but complementary skills sets.

There do not seem to be highly differentiated roles for *other* professionals in CARL libraries; they perform a broad range of roles and functions, and as noted, the numbers of *other* professionals continues to increase in almost all of the identified job classifications. It may be that *other* professionals provide specialized or emergent skill sets throughout these broad classifications; however, new librarian positions and new *other* professional positions both exhibit a large amount of overlap. Further work should be done to understand emerging roles in CARL libraries and the ideal educational background in recruitment.

## **CHAPTER 8: LIBRARIAN COMPETENCIES AND COMPETENCY CHANGE**

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### **Introduction**

The original 8Rs study revealed that defined roles of librarians have undergone significant change over the past many years as the library has shifted from a closed organization with discrete functions to one that is embedded in the larger community and that is driven by increasingly sophisticated technologies. Librarians have been asked to fulfill a wider range of roles that increasingly require information-technology skills. In addition, the original 8Rs study categorically revealed an ever-increasing need for librarians to perform management and leadership roles. It was concluded that the professional librarian of the 21<sup>st</sup> Century must be willing to adapt to these new role requirements by learning new skills and by learning new ways of working, both throughout the various domains and functions of the library as well as across time.

8Rs Redux has demonstrated that in the 10 years since the original study, CARL libraries have undergone an unusually high period of staff turnover as a result of the volume of retirements and subsequent recruitments. Such a change suggests the supply of competencies held by librarians as a whole has also likely shifted in the past decade. With a significant portion of older librarians leaving and with an injection of young and recently educated MLIS graduates, we might predict that the gap between the competencies demanded by libraries, and the supply of these competencies by librarians, has narrowed in this time. Moreover, as CARL libraries actively address the human resources challenge of developing a skilled and able workforce by recruiting for, or training in, high demand competencies, an even greater share of librarians should now possess such skills and abilities.

We begin the examination of librarian competencies, therefore, with an assessment of demand change by comparing a series of results from both 2003 and 2013 designed to measure competency demand against the ability to recruit for those competencies. The chapter also examines in greater detail the hard skills that are in high demand by assessing the extent to which the demand for librarians to perform these skills has changed in the past 10 years and how well the demand is being met. These include technology, specialized, managerial / leadership / business, and research skills.

### **Competency Demand-Supply Match**

CARL libraries did not experience a great deal of difficulty when recruiting more than 350 new librarians in the past five years (Tables 8 and 23). With this in mind, Tables 30 and 31 present results from the Institutional Survey asking about the extent to which 24 competencies are important when recruiting new librarians (Table 30) and the extent to which they are difficult to fulfill (Table 31). Librarian competency shifts are examined by determining changes in these series of responses between 2003 and 2013.

With more than three-quarters of CARL respondents indicating the competency as important for half (12) of the competencies listed in Table 30, it is evident that competency demand for librarians spans a broad spectrum of skills. Many of these "important" competencies are soft skills such as communication and interpersonal skills or "soft" abilities such as the ability to flexibly adapt to change and to learn new skills. Hard skills deemed to be the most important include technology, leadership, and specialized skills.

**Table: 30: Extent to which Librarian Competencies Important by Survey Year**

(2013 n=22; 2003 n=24)

<b>Competency<sup>1</sup></b>	<b>Percent Libraries Reporting Competency Important / Very Important<sup>1</sup></b>	
	<b>2013</b>	<b>2003</b>
Communication Skills	100	96
Interpersonal or "people" skills	95	96
Technology skills	95	92
Problem-solving skills	91	n/a
Ability to flexibly adapt to change	90	100
Leadership potential	86	88
Innovative	86	88
Ability to learn new skills	86	100
Ability to deal with a range of users	82	96
Specialized skills	77	38
Commitment to organizational goals	77	83
Reliable	77	80
Teaching skills	73	n/a
Managerial skills	73	68
Logical	73	64
Interest in prof. development / cont. ed.	73	80
Research skills	64	n/a
Ability to advocate for library	64	n/a
Entrepreneurial skills	59	50
Other non-MLIS education	45	52
Ability to handle high volume workload	41	76
Generalist skills (can work in different areas)	38	63
Years of experience	38	33
Business skills	27	n/a

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of '4' and '5' on a 5-point scale with '1' meaning "not at all important" and '5' meaning "Very important" to the question: "Rate how important the competency is when you are making recruiting decisions about librarians."

As for differences between 2003 and 2013, we observe a fair amount of stability with a few exceptions. Specialized skills stand out as increasing the most: whereas just 38% of libraries indicated specialized skills as an important competency when recruiting librarians in 2003, fully



77% did so in 2013. Specialized skills are also remarkable for being the most difficult to fulfill competency in 2013, even though less than half of CARL libraries (45%) reported experiencing difficulty fulfilling this competency (Table 31). We examine specialized skills in more detail in the following section of this chapter.

Otherwise, the ability to handle a high volume of work and generalist skills are notable for being important competencies to a significantly smaller proportion of libraries in 2013 than in 2003, reducing from 76% to 41% and 63% to 38%, respectively.

Together, Tables 30 and 31 demonstrate that management skills, and especially leadership potential, are among the most important (73% and 86%, respectively) and difficult to fulfill competencies (36% and 38%, respectively). Even so, they are both noticeably less rare than they were in 2003: 52% of libraries indicated that leadership potential was difficult to fulfill in 2003 compared to 38% in 2013 and 64% felt that management skills were difficult to fulfill in 2003 compared to just 36% in 2013.

With one or two exceptions, a general decline in the percentage of libraries reporting the competency as difficult or very difficult to fulfill is observed in Table 31, with some declines quite dramatic. For example, the ability to flexibly adapt to change and innovativeness, which were viewed as important by a large majority of libraries, were difficult to fulfill competencies for half (50%) of CARL libraries in 2003 compared to just one-fifth in 2013 (19% and 18%, respectively).

Hence, with a minority and declining proportion of libraries experiencing difficulties fulfilling competencies, the results in Table 31 suggest that there is a good and improving match between the competency needs of CARL libraries and the supply of librarians who possess these competencies. The results are also in accordance with the earlier finding that the majority (82%) of libraries have a good or excellent ability to recruit qualified librarians (Table 8).

**Table 31: Extent to which Librarian Competencies Difficult to Fulfill  
by Survey Year**

(2013 n= 22; 2003 n=24)

<b>Competency</b>	<b>Percent Libraries Reporting Competency Difficult / Very Difficult to Fulfill<sup>1</sup></b>	
	<b>2013</b>	<b>2003</b>
Specialized skills <sup>2</sup>	45	63
Leadership potential	38	52
Managerial skills	36	64
Business skills	36	n/a
Other non-MLIS education	29	13
Technology skills	23	16
Ability to flexibly adapt to change	19	50
Years of experience	19	17
Innovative	18	50
Logical	18	17
Research skills	18	n/a
Entrepreneurial skills	18	50
Interpersonal or "people" skills	14	24
Problem-solving skills	14	n/a
Commitment to organizational goals	14	13
Generalist skills (can work in different areas)	10	4
Communication Skills	9	33
Reliable	9	4
Teaching skills	9	n/a
Ability to advocate for library	9	n/a
Ability to handle high volume workload	9	13
Interest in prof. development / cont. ed.	5	4
Ability to learn new skills	5	12
Ability to deal with a range of users	0	16

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of '4' and '5' on a 5-point scale with '1' meaning "Very easy to fulfill" and '5' meaning "Very difficult to fulfill" to the question: "Rate the level of ease or difficulty you have experienced in trying to fulfill these competencies."

<sup>2</sup> In 2003, only 38% of libraries provided a response about the level of difficulty experienced in fulfilling specialized skills.

When asked to comment on how the desired characteristics of librarian candidates has changed in the past 5 years, 40% of institutional respondents indicated that they have not changed. The 13 libraries reporting that they are now looking for different characteristics provided 23 answers with little or no detectable pattern across responses. Mentioned only once, for example, were candidates with the ability to lead, expertise in digital preservation, GIS, copyright, and grant writing. Others responded by referring to soft skills and abilities such as independence of action, willingness to learn new things, flexibility in adapting to change. Hence, the need for librarians to possess different competencies now compared to 5 years ago is not system wide nor is there an identifiable increased need for a specific competency, a set of competencies, or even a type of competency.

These findings are understandable given the wide range of competencies required of librarians as already shown, but also because of the many different specialized skills now required of librarians (Appendix Table 7).

Each of the hard skills listed in Tables 30 and 31 are explored in more detail below by examining a range of demand and supply indicators. When interpreting these results, it is important to keep in mind that none of these competencies are deemed as especially hard to find in candidates in the majority of CARL libraries, but it is the relative level of difficulty in doing so combined with the fact that they are important competencies that warrant their further examination. When appropriate, the findings are presented for each of the three career stages outlined in Figure 14. Career stage is based on the respondent's year of graduation from their MLIS program with recent librarian graduates defined as those who graduated less than 6 years ago, mid-career 6-to-24 years ago, and senior librarians more than 24 years ago. The majority (54%) of librarians are mid-career, 25% are senior librarians, and 21% are recent graduates to the profession.

## **Information Technology Competencies**

As was the case in 2003, the vast majority of libraries indicated that technology skills are important when making recruitment decisions about librarians and roughly 1 in 5 indicated that these skills were difficult to fulfill. In short, the continued demand for IT skills is unequivocal. The following analysis aims to determine how well the supply of IT skills is meeting this demand.

Though a minority (22%) of librarians are performing tasks that would be considered strictly IT (Table 29), the importance afforded to IT-related competencies by CARL libraries suggests that librarians are utilizing their IT skills to a much greater extent. Indeed, the results from the Practitioner Survey presented in Table 32 below show that 73% of librarians are working in jobs that provide them with the opportunity to utilize their IT skills, and slightly fewer (68%) indicated that it is important to work in a job that utilizes these skills. The same proportion (68%) of librarians responding to the 2004 survey felt this way about the importance of utilizing their IT skills indicating no overall change; however, a noticeable shift has occurred in the importance of IT skills among the three career stages. Whereas in 2004, interest in IT skills noticeably decreased as career progressed, career-based differences are no longer apparent by 2014. The "leveling out" of interest in IT skills might indicate that there has been a "normalization" of IT such that it is increasingly accepted by younger and older librarians alike as a given part of daily work. Similarly, it is unlikely that smaller proportions of new-and mid-career librarians are in jobs that utilize their IT skills more than they did 10 years ago (74% down to 66% and 82% down to 73%, respectively). Rather, these reductions might be better interpreted as reflecting a change in the perception of what constitutes IT. To the extent that IT can no longer be said to be new, but is now a natural and routine part of everyday work life for most librarians, it may also be a less distinct skill that stands out on its own.

**Table 32: Librarian Interest and Participation in IT  
by Career Stage<sup>1</sup> and by Survey Year**  
(2014 n=351; 2004 n=420)

Statement	Percent Librarians							
	2014				2004			
	Career Stage				Career Stage			
	Total	Recent graduate	Mid-career	Senior	Total	Recent graduate	Mid-career	Senior
Job provides opportunity to use IT Skills <sup>2</sup>	<b>73</b>	66	73	78	<b>77</b>	74	82	70
Important to have a job that utilizes IT Skills <sup>2</sup>	<b>68</b>	69	68	67	<b>68</b>	82	71	59
Currently required to perform more high tech tasks <sup>3</sup>	<b>46</b>	n/a	40	47	<b>54</b>	n/a	52	56

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about what is important to you in a job and whether that element is part of your library job?"

<sup>3</sup> Based on responses from mid-career and senior librarians of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years?"

Virtually all libraries provide IT skills training (95%) and as shown in Table 33, most librarians (78%) have participated in such training at some point with their current employer. Though new librarians are the least likely to have participated in IT skills training (64%), this training appears to have been more effective than what they received in their MLIS program. Whereas 84% of the 64% receiving on-the-job IT training indicated that it improved their ability to perform their job to a moderate or great extent, just 42% agreed that their MLIS program provided them with the IT skills required to effectively perform their current job.

Notwithstanding the different scales used in these two questions, the high interest among recent graduates to participate in IT skills training (80% compared to 57%, on average) combined with the respective education and training evaluations suggests that CARL libraries are providing important IT skills to their new recruits. This is not to say that MLIS programs are deficient in this regard. In fact, given the wide range of skills required by the librarian profession and the breadth with which IT has permeated many aspects of librarianship, MLIS programs cannot be expected to provide curriculum that spans every possible library sector and every possible position, an issue further explored in Chapter 9. As noted below, moreover, IT skills underlie many of the different specialized skills that are in high demand at CARL libraries, skills that are partly defined as "specialized" precisely because they are not part of typical MLIS curricula.

As for differences between 2004 and 2014, most notable is the significant increase in interest among senior librarians in participating in IT skills training; from 48% in 2004 up to 75% in 2014. This finding, in addition to the Table 32 results showing that senior librarians are more likely to want to work in a job that utilizes their IT skills (from 59% to 67%), suggests that

resistance to new technologies has declined. Other evidence suggests that librarians have become more comfortable with using their IT skills due, in large part it is argued, to the adequacy of continuing education that has been provided (Edge, 2011). This is an especially remarkable shift for senior librarians, many of whom received their formal education during the pre-digital pre-internet era. To some extent, of course, retirements of some of the same senior librarians may have contributed to the shifting landscape of IT interest and participation.

On the other hand, the relative low interest among mid-career librarians in IT skills training has persisted across the decade such that they are now the least likely (53%) to indicate an interest in participating in IT skills training. Career differences in interest in training are further examined in Chapter 9.

**Table 33: Librarian IT Skills Training by Career Stage<sup>1</sup> and by Survey Year**  
(2013 n=400; 2003 n=503)

Statement	Percent Librarians							
	2014				2004			
	Career Stage				Career Stage			
	Total	Recent graduate	Mid-career	Senior	Total	Recent graduate	Mid-career	Senior
Participated in IT skills training <sup>2</sup>	78	64	77	92	89	77	91	92
Training improved ability to perform job <sup>3</sup>	91	84	95	90	92	83	91	95
Interested in participating in IT skills training <sup>4</sup>	57	80	53	75	58	76	58	48
Effective MLIS IT Training <sup>5</sup>	42	42	n/a	n/a	44	44	n/a	n/a

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on "yes" responses to the question of having ever participated in technology skills training "at your current workplace."

<sup>3</sup> Based on responses among those who have ever participated in IT skills training in their workplace of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question asking, "the extent to which the training improved your ability to perform your job."

<sup>4</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "Please indicate the extent to which you agree / disagree with the following statements about training, career development, and organizational commitment?"

<sup>5</sup> Based on responses from recent librarian graduates of 4 or 5 on a 5-point scale with 1 meaning "strongly agree" and 5 meaning "strongly disagree" to the statement about their MLIS program: "The program provided me with the information technology skills required to effectively perform my current job."

In terms of the match between the demand for and supply of IT skills, the findings indicate that the continued high need for IT skills is being met with sufficient interest and training by all staff except with respect to mid-career librarians' lowered interest in IT training. The findings also highlight the importance of the ongoing need to offer IT skills training to all librarians, but for different reasons. Among those who have recently graduated from the MLIS program, IT skills training supplements their formal education perhaps in ways that allow them to develop a

specialization. Among senior librarians, IT skills training appears to have been instrumental in helping to bridge what was formerly a sizeable digital gap.

## Specialized Competencies

Of all the librarian competencies, the demand for specialized skills has increased the most dramatically in the last decade and is the most difficult to fulfill of all competencies. Even so, 10 years ago the vast majority of institutional respondents were already indicating that librarians were increasingly required to perform more specialized functions in the past 5 years and were equally as likely to predict the continuation of this increased need for the future (Table 34).

**Table 34: Increased Past and Future Demand for Librarian Specialized Functions by Survey Year**  
(2013 n=22; 2003 n=25)

<b>Statement</b>	<b>Percent Libraries Reporting to a Moderate or Great Extent</b>	
	<b>2013</b>	<b>2003</b>
The need for librarians to perform more specialized functions has increased in the past 5 years <sup>1</sup>	100	92
The need for librarians to perform more specialized functions will increase over the next 5 years <sup>2</sup>	95	96

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent" to the question: "To what extent have the following changes in the staffing needs of your library occurred in the past 5 years?"

<sup>2</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent" to the question: "To what extent do you think the following changes in the staffing at your library needs will occur at your library over the next 5 years?"

But, what exactly, are these high demand and somewhat difficult to fulfill specialized skills? When asked to provide the most common specialized functions that librarians are now required to perform more often than they did 5 years ago, 18 libraries provided 46 responses. Once again, the specialized functions are wide ranging and a quick glance at Appendix Table 7 reveals the high level of technological sophistication required for many of these functions and by implication at least one of the reasons why new librarian entrants are so interested in IT skills training (Table 33).

Most of the specialized functions are in public services or collections (each comprise about one-third of all specialized functions provided). Examples of the former include research support, bibliometrics, e-learning and instruction. Examples of the latter include data management, digitization, and scholarly communication. IT specialized functions underpin collections and public services, such as GIS and developing and managing institutional repositories. Finally, about one quarter of new specialized functions include a range of other types such as copyright, fundraising, project planning, assessment, or metadata.

The advantages of specialized skills and defined specialist roles are the deep content or functional knowledge brought into use within the library. However, this leads to questions of how many specialists can or should be recruited given circumstances of budget and the overall environment of established positions and organizational structures. For example, should libraries develop their own capacity for fundraising and establish or recruit for this skills set, or should they utilize the expertise of those in fundraising or advancement positions within the larger institution? The answer to this question will vary from library to library depending upon their operating environment. It is also complicated by the understanding that an individual in a specialized position may be less interested or willing to develop other areas of expertise as priorities change or the need for the specialized skills set decreases. In other words, the competency of 'ability to flexibly adapt to change', which is still very important (to 90% of library respondents), and sometimes difficult to fulfill (19% of library respondents), could be hampered if those in specialized positions or with specialized skill sets are not willing to adapt to changing circumstances within the library organization.

## **Management, Leadership, and Business Competencies**

In 2003, CARL libraries did not, by and large, experience difficulty recruiting librarians; however, they did experience problems in finding librarians with leadership and management skills. In fact, the gap between the interests of librarians and the institutional need for librarians to perform leadership and management roles was one of the most widely disseminated findings from the 8Rs research. 8Rs Redux has found that while both of these skills and abilities remain in high demand (Table 30), considerably more CARL libraries are able to find librarian candidates with these skills (Table 31). This is an important shift that warrants further investigation.

The results related to management and leadership skills and roles thus far in the report include the following:

- Table 30: 86% of libraries indicated leadership potential as an important competency when recruiting librarians, just 73% felt same way about managerial skills, and even fewer (27%) about business skills.
- Table 31: A further 38% libraries indicated that leadership potential was a difficult to fulfill competency when recruiting and 36% responded similarly for managerial skills, down from 52% and 64% in 2003, respectively.
- Table 13: 52% of libraries indicated that their internal pool of candidates was adequate to replace the managerial skills of retiring librarians and 44% responded the same way with respect to leadership abilities.
- Table 14: Three quarters of libraries reported that inadequate post-MLIS leadership development and management training served as a barrier to replacing competencies lost from retiring librarians.
- Figure 12: The proportion of librarians working as middle managers decreased from 28% in 2004 to 19% in 2014.

Table 35 provides data that reinforces the continued demand that CARL libraries have for librarians to perform management and leadership roles, and to a lesser extent business functions. Even so, the results provide a slight indication that this demand is not quite as high as it was in 2003 and that it is expected to continue for a marginally smaller proportion of libraries. Moreover, it is notable that whereas in the past there was greater increased need for managerial functions than for leadership roles (95% compared to 86%), it is predicted that leadership roles will be in slightly greater demand in the future (95% compared to 82%).

Interestingly, Table 35 also demonstrates that smaller proportions of librarians than libraries agreed that their engagement in these roles has increased in the past 5 years. The pattern of libraries having a lower demand for business skills than for managerial or leadership skills, however, is also found among librarians. Still, it is not insignificant that roughly half of mid-career and senior librarians indicated in both 2004 and 2014 that they are performing more managerial / leadership roles or functions.

**Table 35: Increased Past and Future Demand for Librarian Leadership, Management, and Business Functions / Roles by Survey Year**

	Percent	
	2013/2014	2003/2004
<b>Libraries Reporting that need for librarians to perform has increased in past 5 years<sup>1</sup></b>		
	(n=22)	(n=25)
Leadership roles	86	100
Managerial functions	95	100
Business functions	67	n/a
<b>Libraries Reporting that need for librarians to perform will increase in next 5 years<sup>2</sup></b>		
Leadership roles	95	100
Managerial functions	82	96
Business functions	57	n/a
<b>Librarians Agreeing "Compared to 5 years ago, I am currently required to . . . "<sup>3</sup></b>		
	(n=304)	(n=368)
Perform more managerial functions	50	51
Assume more of a leadership role	58	54
Perform more business functions	41	32

Sources: 8Rs 2013 and 2003 Institutional Surveys and 8Rs 2013 and 2003 Practitioner Surveys

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent" to the question: "To what extent have the following changes in the staffing needs of your library occurred in the past 5 years?"

<sup>2</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent" to the question: "To what extent do you think the following changes in the staffing at your library needs will occur at your library over the next 5 years?"

<sup>3</sup>Based on responses from mid-career and senior librarians of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years."



The question remains as to whether the original 8Rs findings of a discernable disjoint between the increased need of CARL libraries for their librarian staff to perform leadership and managerial positions and the lack of interest among librarians to perform these roles has continued. The results presented in Table 36 speak to this question by examining the level of librarian interest in performing these roles compared with the extent to which they are performing the roles in their jobs in 2014 and 2004.

Of first importance to note is that librarians are the most interested in performing leadership roles, a finding that holds across career stages and survey years. Among the five measures of leadership, librarians are the most interested in seeking out new project opportunities (73%), an endeavor performed by 57%. Also of note is the observation that librarian interest in performing these various leadership, management, and business roles is greater than the opportunities for them to perform these roles (i.e., the top number is higher than the bottom number of the importance / participation pairs). This finding is apparent for all roles listed in the table except for supervisory ones where just 35% are interested in performing compared to 48% of librarians who are supervising. Once again, the observation applies to both survey years, but not to recent librarian graduates largely because they are about half as likely as their mid-career and senior counterparts to be working in supervisory roles. In fact, a defined linear relationship between role performance and career stage is apparent such that recent graduates are the least likely to be engaged in these roles and senior librarians the most likely.

Of final note from Table 36 is the over-time increase in the proportion of librarians who feel it is important to have a job where they are allowed to manage a service or department (increasing from 34% to 41%) and the coinciding decrease in those who are managing in their jobs (decreasing from 47% to 42%). Though the latter change is not great, the combined result of both changes is a noticeable narrowing of the interest / performance gap for managerial roles from 13 percentage points in 2014 down to virtual parity in 2014. This pattern is once again most apparent among mid-career librarians and corresponds with the decrease in the share of middle management positions from Figure 12 (from 28% of all librarian jobs down to 19%).

**Table 36: Librarian Interest and Participation in Leadership, Management, and Business Roles by Career Stage<sup>1</sup> and by Survey Year**

(2014 n=354; 2004 n=502)

Statement	Percent Librarians Agreeing <sup>2</sup>							
	2014				2004			
	Career Stage				Career Stage			
	Total	Recent Grad.	Mid-Career	Senior	Total	Recent Grad.	Mid-career	Senior
<b>Leadership</b>								
Important to perform leadership role	<b>62</b>	61	63	56	<b>59</b>	77	61	55
Job allows leadership role	<b>54</b>	36	58	61	<b>58</b>	43	59	65
Important to motivate others	<b>58</b>	54	58	60	<b>59</b>	52	53	51
Job allows motivate others	<b>57</b>	35	59	70	<b>60</b>	40	60	67
Important to seek out new project opportunities	<b>73</b>	83	71	69	<b>76</b>	60	79	68
Job allows seek out new project opportunities	<b>57</b>	50	58	61	<b>67</b>	43	68	65
Important to forge partnerships within university	<b>60</b>	61	58	60	<b>n/a</b>	n/a	n/a	n/a
Job allows forge partnerships within university	<b>54</b>	46	55	57	<b>n/a</b>	n/a	n/a	n/a
Important to forge partnerships outside university	<b>48</b>	46	44	56	<b>n/a</b>	n/a	n/a	n/a
Job allows forge partnerships outside university	<b>37</b>	19	37	49	<b>n/a</b>	n/a	n/a	n/a
<b>Management</b>								
Important to manage service / department	<b>41</b>	39	40	46	<b>34</b>	31	34	37
Job allows manage service / department	<b>43</b>	19	44	58	<b>47</b>	21	51	55
Important to supervise	<b>35</b>	42	34	31	<b>32</b>	31	34	27
Job allows supervisory role	<b>49</b>	20	52	64	<b>52</b>	22	58	57
<b>Business</b>								
Important to use business skills	<b>32</b>	31	30	36	<b>n/a</b>	n/a	n/a	n/a
Job allows use of business skills	<b>33</b>	15	36	38	<b>n/a</b>	n/a	n/a	n/a

Sources: 8Rs 2013 and 2003 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following sets of questions meaning what is important to you in a job and whether that element is part of your library job?"

Table 37 provides results pertaining to training in management, leadership and business skills. When available, the data for each type of skill includes the proportion of libraries providing training, librarian interest and participation in such training, and whether the training improved job performance for 2013/2014 and 2003/2004.

Leadership training is provided by nearly all libraries (95%), a significant increase since 2005 (66%). Similar to the findings from Table 36, leadership training also engenders the greatest amount of interest (62%). With just 22% of librarians participating in leadership training, however, this type of training exhibits the largest interest – participation gap. This finding holds even when considering the number of librarians who have participated in the Northern Exposure to Leadership Institute or the University of Saskatchewan Leadership Program (which raises the total participation rate in leadership to 36%). Otherwise, librarians are the most likely to have participated in management training (47%), which is also the type of training the most likely to result in improved job performance to a moderate or great extent (80%). The low rate of participation in leadership training (22%) might explain why three-quarters of libraries viewed inadequate post-MLIS leadership development as a barrier to replacing competencies lost by retiring librarians (Table 14).

As we would expect, recent librarian graduates are the least likely to have ever participated in any of the types of training, and as a result the interest-participation gap tends to narrow as one's career progress. This pattern holds even though mid-career librarians are the least likely to be interested in any of the types of training for which data are available (except business skills in 2004).

The only other over-time change to note is that participation in both leadership and management training has decreased (from 34% to 22% and from 58% to 47%, respectively).

**Table 37: Librarian Management, Leadership, and Business Skills Training by Career Stage<sup>1</sup> and by Survey Year**

(2014 n=354; 2004 n=502)

Statement	Percent Librarians							
	2014				2004			
	Career Stage				Career Stage			
	Total	Recent Grad.	Mid-Career	Senior	Total	Recent Grad.	Mid-career	Senior
<b>Leadership Training / Development</b>								
Provided by library <sup>2</sup>	95	n/a	n/a	n/a	66	n/a	n/a	n/a
Interested in <sup>3</sup>	62	75	64	70	n/a	n/a	n/a	n/a
Participated in <sup>4</sup>	22	9	26	23	34	8	31	49
Improved performance <sup>5</sup>	71	--	72	70	87	--	91	86
<b>Management Skills Training</b>								
Provided by library <sup>2</sup>	68	n/a	n/a	n/a	76	n/a	n/a	n/a
Interested in <sup>3</sup>	55	74	55	63	55	69	60	64
Participated in <sup>4</sup>	47	20	49	66	58	19	59	75
Improved performance <sup>5</sup>	80	67	79	82	92	53	78	83
<b>Supervisory Skills Training</b>								
Participated in <sup>4</sup>	35	13	32	61	n/a	n/a	n/a	n/a
Improved performance <sup>5</sup>	73	42	67	79	n/a	n/a	n/a	n/a
<b>Business Skills Training</b>								
Provided by library <sup>2</sup>	36	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Interested in <sup>3</sup>	44	69	41	60	38	41	58	56
Participated in <sup>4</sup>	16	7	14	29	n/a	n/a	n/a	n/a
Improved performance <sup>5</sup>	62	--	73	64	n/a	n/a	n/a	n/a
<b>Northern Exposure to Leadership (NELI)</b>								
Participated in <sup>4</sup>	10	0	18	3	6	4	9	3
Improved performance <sup>5</sup>	56	--	67	--	74	--	62	--
<b>University of Saskatchewan Leadership Program</b>								
Participated in <sup>4</sup>	4	7	3	4	n/a	n/a	n/a	n/a
Improved performance <sup>5</sup>	54	--	--	--	n/a	n/a	n/a	n/a

Sources: 8Rs 2013 and 2003 Institutional Surveys and 8Rs 2013 and 2003 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on "yes" responses to the question, "During the past year, did your library provide any of the following training?"

<sup>3</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree/disagree with the following statements about your training, career development, and organizational commitment."

<sup>4</sup> Based on "yes" responses to the question, "For the following list, first indicate if you have ever participated in the type of training through your current workplace."

<sup>5</sup> Based on responses from those participating in training of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question: "For the following list, please indicate to what extent the training improved your ability to perform your job?"

Our final examination of management, leadership, and business skills includes recent librarian graduates' views on the extent to which their MLIS education provided them with these skills. Table 38 demonstrates that, though a greater proportion of recent graduates agreed that this was the case in 2014 than in 2004, it is still by far not a dominant sentiment. Since teaching leadership skills in the classroom is, by most accounts, a virtual impossibility, the findings with respect to leadership are understandable. Given that library schools are aware of the push for librarians to perform managerial roles, however, we would expect to see more than one-third of librarians feeling they have completed their degree with the requisite managerial and business skills. We explore this issue in greater depth in Chapter 9 on education and training.

**Table 38: Recent Graduate Librarian Management, Leadership, and Business MLIS Education by Survey Year**  
(2014 n=78; 2004 n=70)

	<b>Percent Recent Librarian Graduates Agreeing</b>	
	<b>2014</b>	<b>2004</b>
<b>MLIS Program Provided me with the . . . <sup>1</sup></b>		
Management skills required to effectively perform my current job	33	23
Leadership skills required to effectively perform my current job	25	16
Business skills required to effectively perform my current job	16	6

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses from recent librarian graduates of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the statement: "To what extent do you agree or disagree with the following statements about the education you received in your Master of Library and Information Studies program?"

## Research Competencies

More than 3 in 5 libraries indicated that research skills are an important competency when making recruiting decisions about librarians (Table 30), and 1 in 5 indicated that the competency is difficult or very difficult to fulfill when recruiting (Table 31).

We do not have data on research competencies from the original 8Rs study, however, the literature suggests that they are increasing in demand, both when librarians support the research of others on campus and when conducting their own research. There is some suggestion that the demands to conduct research and to publish are not only unnecessary, but they are also unrealistic in light of an already heavy workload. Many librarians themselves simply feel ill-equipped to conduct research, highlighting the scant coverage of research in most MLIS programs. The main issue seems to be that most academic librarians are expected to conduct research, but it is not clear if they are being supported in this endeavor, nor is it clear if there is sufficient interest on the part of librarians to take on research initiatives (Berg et al., 2013; Fox, 2010).

A recent survey by Berg et al (2013) of CARL administrators found that at least some librarians are required to conduct research in the vast majority (79%) of CARL libraries. The study also found a significant shift in research and scholarly expectations in the past 5 years, a shift that is expected to continue. With these increasing expectations in mind, we examine a range of 8Rs results that measure librarian participation and interest in conducting research and in research-related training.

Beginning with Table 39 which presents the research tasks that are being performed by librarians at all three career stages, we observe that an average of 4 in 10 (42%) librarians are performing research-related tasks, a proportion half the size of the expectations of CARL library administrators (Berg et al., 2013). Not surprisingly, literature review is the most common research task and one that is somewhat equally conducted by all three career stages of librarians (53%). Similarly, few differences based on career stage are evident for data analysis and presentation of results. Conducting research, proposal writing, and publishing are somewhat less common among recent graduates, however, suggesting that these new staff may be performing more research-assistant type roles than their more experienced counterparts. Overall, the results indicate that mid-career librarians are generally more likely to be engaging in the various aspects of research.

The relatively small proportion (31%) of all librarians developing the methodology for studies begs the question of who is performing this critical phase of the research process. Perhaps the findings mean that many librarians are engaging in the type of scholarship that would be more akin to professional writing than that which would be considered within the scope of traditional research. Alternatively, the results could suggest that CARL librarians are engaging in collaborative research where methodology development is the responsibility of only the most skilled and able researcher in the group. We cannot confidently draw conclusions about which of these two scenarios is more likely; however, in either case the implication is that many CARL librarians may lack the skills necessary to conduct scholarly research from inception to publication.

**Table 39: Librarian Participation in Specific Research-Related Tasks by Career Stage<sup>1</sup>**

(n=363)

Task	Percent Librarians Performing Task at Least Sometimes <sup>2</sup>			
	Total	Recent graduates	Mid-Career	Senior
<b>Research-Related Tasks Total</b>	<b>42</b>	<b>36</b>	<b>45</b>	<b>41</b>
Conducting literature reviews	53	49	55	52
Analyzing data	48	47	49	48
Presenting research results	46	43	48	44
Conducting quantitative or qualitative research	44	29	47	40
Writing research proposals	38	30	40	40
Publishing results of research	38	23	47	42
Developing methodology for a study	31	32	34	23

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question, "How often do you perform each of the following job functions?"

The results in Table 40 suggest that any skill shortages that might exist in the area of research do not primarily stem from a lack of interest on the part of librarians themselves. The importance librarians at all career stages attach to conducting and publishing research is slightly greater than what their job allows them to do. The gap between interest and participation in conducting and publishing research, moreover, is the largest among recent graduates both because of their greater interest in conducting research and because it is reportedly not part of their jobs. Research leaves, however, do not line up in such a linear fashion since a greater proportion of mid-career librarians take research leaves than are interested in doing so (69% compared to 53%). The proportion of librarians interested in any of the aspects of research presented in Table 40 is notable for being lower than the 80% of CARL libraries expecting librarians to conduct research (Berg et al., 2013). Finally, that just 21% of mid-career and senior librarians purport to be conducting more research than they did 5 years ago does not constitute exceptionally strong support for claims that research is a competency of increasing prominence to librarianship.

**Table 40: Librarian Participation and Interest in Conducting Research by Career Stage<sup>1</sup>**

(n=400)

Statement	Total	Percent Librarians Agreeing <sup>2</sup>		
		Career Stage		
		Recent Graduate	Mid-Career	Senior
Job allows me to <u>conduct research</u>	47	44	46	46
Important to have a job that allows me to conduct research	52	65	49	49
Job allows me to <u>publish research</u>	41	31	42	42
Important to have a job that allows me to publish research	45	58	50	50
Job allows me to take <u>research leaves</u>	58	31	69	69
(2004)	(69)	(57)	(69)	(74)
Important to have a job where I'm eligible for research leaves	57	58	53	53
Compared to 5 years ago, I am currently required to perform more research	21	n/a	23	15

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about what is important to you in a job and whether that element is part of your library job?"

A lack of interest in conducting research does not appear to be the dominant reason underlying deficits in research skills, nor does a lack of interest in training (Table 41). Rather, the results indicate that it is rare for librarians to engage in any research-related training. Just 19% of librarians have ever participated in such training in their workplace. A further 8% had attended the CARL Research Institute, 61% of whom indicated that it improved their ability to perform their job to a moderate or great extent.<sup>1</sup> The low participation in research training, furthermore, does not line up with library's purported provision of such training: roughly 4 in 5 (82%) of institutional respondents indicated that they provide training in research methods. Given that most librarians appear interested in training that is being offered, it is not clear why such a small percentage of librarians are participating in training.

As for career stage differences, with such small numbers of recent graduates participating in research methods training at the CARL Research Institute (n <15), we are unable to present their evaluations of this training, which otherwise are quite positive.

<sup>1</sup> CARL launched the Librarians' Research Institute in 2012 to provide an opportunity for CARL librarians to come together and work on their research in an intensive workshop setting.



**Table 41: Librarian Research-Related Training  
by Career Stage<sup>1</sup>**  
(n=400)

Statement	Total	Percent Librarians		
		Career Stage		
		Recent Graduate	Mid-Career	Senior
Participated in research-related training <sup>2</sup>	19	11	21	20
Training improved ability to perform job <sup>3</sup>	69	--	70	61
Participated in CARL Research Institute <sup>2</sup>	8	4	10	8
Training improved ability to perform job <sup>3</sup>	61	--	73	--
Interested in participating in research-related training <sup>4</sup>	61	76	62	44
Effective MLIS research training <sup>5</sup>	51	51	n/a	n/a

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on "yes" responses to the question, "For the following list, first indicate if you have ever participated in the type of training through your current workplace."

<sup>3</sup> Based on responses from those participating in training of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question: "For the following list please indicate to what extent the training improved your ability to perform your job?"

<sup>4</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree/disagree with the following statements about your training, career development, and organizational commitment."

<sup>5</sup> Based on responses from recent librarian graduates of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly disagree" to the statement: "To what extent do you agree or disagree with the following statements about the education you received in your Master of Library and Information Studies program?"

We have deduced that a major reason why librarians are not performing research is due to a lack of skill, which is underscored by a lack of training. Librarians themselves were asked to indicate the extent to which a series of issues served as a barrier to conducting research, and these results are presented in Table 42 by career stage. A lack of time to conduct research stands out as the most pervasive barrier reported by roughly 9 in 10 librarians. Even though the majority of librarians are eligible for research leaves (58%; Table 40), a lack of financial support was viewed as a barrier by a similar proportion (58%). Otherwise, differences between the extent to which librarians view the items as a barrier are not great, though it is interesting that roughly half of librarians feel they lack research skills or confidence in their skills given that the majority are expected to conduct research. This gap is more pronounced for mid-career and senior librarians than it is for recent graduates among whom just 26% indicated lack of interest as a barrier to their conducting research to a moderate or great extent.

Librarians were also asked to indicate if there were any other reasons why they were prevented from conducting research. Just over one-third (34%) of librarians provided a response with the largest proportion (33%) of the responses indicating that they do not

conduct research because it is not required of them. Fully 23% reported that they did not have the organizational support that they require to conduct research which meant, for many, that it was not encouraged or valued by their library or that they did not receive adequate compensation for conducting research either financially or in terms of time. The lack of time was reiterated by about 20% of librarians and just over 10% commented on their inability to know where to start or to even choose a research topic.

These findings suggest that though there is a gap between the need for, and supply of, librarians to conduct research, it is not excessive. The disjoint is primarily due to a lack of time and organizational support and a shortage of skills, skills that are lacking due to insufficient training. Once again, it is unclear whether this is due to a shortage of training opportunities provided by CARL libraries or because librarians are not capitalizing on these opportunities.

**Table 42: Perceived Barriers to Conducting Research among Librarians<sup>1</sup>  
by Career Stage**  
(n=391)

Barrier to Conducting Research	Percent Librarians Reporting to a Moderate or Great Extent <sup>1</sup>			
	Career Stage <sup>2</sup>			
	Total	Recent Graduate	Mid-Career	Senior
Lack of time	89	89	89	85
Lack of financial support	58	65	60	47
Lack of mentorship support	53	56	57	40
Lack of confidence in research skills	52	48	54	49
Lack of research skills	46	43	46	45
Lack of recognition for conducting research	40	46	42	30
Lack of interest	40	26	41	49

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question, "To what extent do you the following prevent you from conducting research?"

<sup>3</sup> Allocation to career stage is based on year graduated from the MLIS program with Recent Librarians graduating after 2008, Mid-career Librarians graduating between 1990 and 2008, and Senior Librarians graduating before 1990.

## Practitioner Indicators of Demand

Table 43 shows that the majority of mid-career and senior librarians are in a sustained period of having to learn new tasks, perform more difficult tasks, and therefore, to work harder. The requirement to learn new and more difficult tasks while at the same time performing fewer

routine tasks, not only suggests a continual up skilling of librarians but also a need for continual on-the-job training. The observation that very similar proportions of 2014 and 2004 respondents agreed with the four statements in Table 43 illustrates a level of consistency that defies the fact that a decade has elapsed between survey responses. The findings also have implications for job satisfaction, the subject of Chapter 10.

**Table 43: Mid-Career and Senior Librarian Perceived Work Changes by Survey Year**

(2014 n=303; 2004 n=373)

<b>Compared to 5 years ago, I am currently required to . . .</b>	<b>Percent Agreeing<sup>1</sup></b>	
	<b>2014</b>	<b>2004</b>
Learn more new tasks	56	54
Perform more difficult tasks	49	54
Perform more routine task	21	20
Work harder	51	53

Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years."

## Summary of Major Findings & Conclusions

On the whole, CARL librarians are expected to possess a wide cross-section of both soft and hard skills (Table 30), most of which are not difficult to find in the pools of candidates applying for librarian positions (Table 31). With respect to the former, CARL recruiters are finding it much less difficult than they did in 2004 to find candidates with the ability to flexibly adapt to change and who are also innovative, both of which are soft competencies that have been said to characterize the 21<sup>st</sup>-Century Librarian. This change thus marks a considerable shift in the supply of competencies brought to the workplace by librarians.

Otherwise, of all the changes presented in this chapter, the increased need for librarians to perform a wide array of typically high-tech and specialist roles is perhaps the most indicative of what the 21<sup>st</sup>-Century librarian looks like. If the skill sets required to perform roles such as bibliometrics, e-learning, digitization, and GIS are not typically acquired in library schools, the onus is placed primarily on the library itself to ensure staff are adequately trained. The intersection of the demand for specialized and IT skills demonstrates the importance of on-the-job training, a challenge that CARL libraries have been largely meeting with success. Of all the competencies examined, librarians are most likely to be interested in practicing IT skills, as well as most likely to be interested in and to have participated in IT training (Tables 32 and 33). Effective IT training that has been provided to librarians, combined with the fact that IT has now been part of the academic library for nearly two decades, seems to have increased IT

skill sets to the extent that senior librarians are now just as likely as recent graduates to show interest in using (Table 32) and furthering their IT skills (Tables 33).

In fact, the results overall have demonstrated the importance of ongoing training for the development of a skilled workforce, not just for IT or for specialist roles, but also for conducting research and for performing leadership, managerial, and business roles. On-the-job training is especially required for inculcating the talents and sensibilities typical of performing leadership roles insofar as they are arguably difficult to teach in the classroom setting of the library school. Though there is evidence to suggest that there is still room for library schools to enhance curriculum dedicated to management and research skills (Table 38), the gap between librarian interest in continuing their education in these competencies and their participation in such education (Table 37) also suggests there is room to enhance the opportunities and organizational support for such on-the-job training. These findings should be interpreted within the context of an overall improved match between the demand for and supply of leadership and management skills since 2004 (Tables 30 and 31).

### **Strategic Human Resources Planning Implications**

- Competencies continue to change within CARL libraries. Both library schools and library organizations have a role to play in defining the changing knowledge base for the profession as well as ensuring that needed skills are developed or re-developed in the light of emerging needs. On-going discussions with library schools and participation on school advisory committees and with ALA accreditation committees, will help ensure that CARL libraries and schools maintain a common understanding of the changing competencies for research libraries.
- The importance of specialized skill sets within CARL libraries is clearly indicated by institutional respondents, with libraries reporting needs over a broad spectrum, and many but not all libraries experiencing difficulty filling these needs through recruitment. CARL libraries thus need to assess their current and on-going training initiatives in light of the demand for specialized skill sets and on-going needs for leadership, management and research skills.
- The need for a wide range of specialist skills across almost all CARL libraries, should also provide the catalyst for focused discussions on the ways in which CARL libraries might share expertise and encourage those in specialist roles to train and mentor others across the breadth of CARL libraries. Collaborative and peer-led initiatives, such as the CARL Research Institute, should also be encouraged among CARL libraries. Given the cost of travel for on-site training, alternative delivery mechanisms, such as Webinars or access to live events via video, should also be considered.

## CHAPTER 9: EDUCATION AND TRAINING

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### Introduction

When contemplating the magnitude of the role change that librarians have undergone in recent decades, it is not hard to imagine the scope of what has been required to facilitate this shift, not only by librarians themselves but also by employers invested in their success. It is also easy to see how many elements need to work together, beginning with an MLIS curriculum that is current and relevant to the needs of research libraries through to on-the-job training and development opportunities, all while librarians and soon-to-be librarians are motivated to learn and to keep learning.

In 2006, the 8Rs research team, on behalf of the Cultural Human Resources Council of Canada, conducted an in-depth investigation into the education and training provided to librarians and paraprofessionals across all library sectors. The study provided an evaluation of education from a broad spectrum of populations including current students, recent graduates, LIS and LIT program heads, and employers and also encompassed a content evaluation of curriculum. The "Training Gaps Analysis" (8Rs Research Team, 2006) report contains dozens of recommendations that emerged from the findings, some of which are presented below in relevant sections.

The analysis of librarian competencies in the previous chapter already notes the effectiveness of IT training and the continued need for ongoing training in research, leadership, management, and to some extent, business skills. The results also show that recent graduates rate their MLIS research and IT education higher than their management, leadership, and business skills education. We continue this line of inquiry in the current chapter by presenting results on how recent graduates and CARL libraries feel that MLIS programs could be improved, while also opening up the investigation to the training of *other* professionals and paraprofessionals.

The chapter begins with a presentation of the educational backgrounds of CARL staff; however, the major analysis focuses on practitioner evaluations of MLIS programs and of continuing education and training.

### Educational Background

Table 44 provides responses from librarian practitioners about their other non-MLIS education. Since the data are provided by both career stage and by survey year, we are able to conduct an analysis of other education that distinguishes career stage (cohort) effects from the effects of working in 2004 versus 2014 (period effects).

The table shows that a total of 37% of librarians have earned at least two graduate degrees (MLIS plus 32% with a second Master's and 5% with a PhD). Though the cohort of recent graduates is somewhat less likely than the mid-career or senior librarian cohorts to have

attained supplemental graduate education (28% compared to 35% and 37%, respectively), it is significant that nearly one-third of librarians are entering the profession with two graduate degrees. Recent graduates are also, however, more likely to have earned a library technician certificate or diploma (9% compared to 3% and 2%, respectively). The latter findings suggest a small trend of previous paraprofessionals earning their MLIS to work as professionals. This cohort distinction also appears to be relatively new since equally small percentages (3%) of 2004 recent graduates and mid-career librarians earned a librarian technician credential.

It is also notable that many librarians have earned more than one supplemental graduate degree. Specifically, three-quarters of PhD earners have also earned a non-MLIS Master's degree and more than one in ten Master's earners also earned a PhD. In total, 3% of all librarians in the 2014 sample have earned two Master's degrees and a PhD. The earning of additional post-MLIS education is supported by other findings that 6% of librarians indicated that they were currently enrolled in a postsecondary program, about half of whom were in graduate programs and the other half who were taking professional certifications.

In terms of period effects, the results show a clear trend of increasing graduate education among CARL librarians. Whereas 28% of librarians in 2004 had a second graduate degree, this figure increased to 37% by 2014. Since increases in supplemental graduate degrees are only observed among mid-career and senior librarians, the results suggest that at least some librarians have earned these advanced degrees after already having worked in the profession (rather than before starting their librarian career). This trend may be in response to the increased demand for librarians to perform specialist roles that require additional degrees such as an MBA, MEd, or MSc in IT (see Table 30: 77% of CARL libraries surveyed in 2013 indicated that specialist skills were important compared to just 38% in 2003).

**Table 44: Librarian Non-MLIS Education  
by Career Stage<sup>1</sup> and by Survey Year**  
(2014 n=379; 2014 n=512)

Percent Librarians								
2014					2004			
Non-MLIS Education	Career Stage				Career Stage			
	Total	Recent Grad.	Mid-Career	Senior	Total	Recent Grad.	Mid-career	Senior
Library tech. cert./ dip.	4	9	3	2	2	3	3	0
Other Master's	32	27	35	30	26	28	28	23
Ph.D.	5	1	5	7	2	0	3	2

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

The highest levels of educational attainment for other staff are presented in Table 45. *Other* professionals are most likely to have a graduate degree (45%) or an undergraduate degree (32%). All paraprofessionals have some type of postsecondary education and they are most likely to have an undergraduate degree (61%), though a notable proportion (10%) also has a master's degree. We also observe an increase in the educational attainment among paraprofessionals since 2004, primarily due to the greater proportion who have attained an undergraduate degree (61% compared to 52%). Since nearly 1 in 5 paraprofessionals is currently enrolled in a postsecondary program (19%), we have evidence that their educational attainment levels will continue to increase.

**Table 45: Highest Level of Education among *Other* Professionals and Paraprofessionals by Survey Year**

(2014 n=361; 2004 n=415)

	Percent		
	2014	2004	
	<i>Other</i> Professionals	Para- professionals	Para- professionals
High school	8	0	14
Library tech. cert. / dip.	3	25	15
Other postsec. cert. / dip.	10	4	11
Education degree	2	6	2
Other Undergrad. degree	32	55	50
Master's degree	37	10	7
PhD	8	0	1

Sources: 8Rs 2014 and 2004 Practitioner Surveys

## MLIS Education Evaluation

Master's-level education in Library and Information Science (LIS) has existed for over a century in Canada, and there are now eight library schools in the country. While ALA accreditation dictates program objectives and standards, broad trends in the field of information and more specific trends within library sectors also influence curriculum. Interviews with 7 LIS deans in 2006 revealed that a main determinant of curriculum choice is to provide a sufficiently general program to enable graduates to work in all types of library sectors balanced with opportunities to specialize. MLIS programs also provide important socialization into the profession, a process that has been pointed out as conspicuously and problematically absent among non-MLIS professionals (Neal, 2006).

In support of the pedagogical underpinnings of MLIS programs, the 8Rs Training Gaps Analysis found that 62% of current students and 51% of recent graduates gave favourable ratings to general skills provided in their programs. The current findings of 8Rs Redux indicate that recent graduates afford library schools with a slightly higher rating of providing such core competencies (69%). In fact, as shown in Table 46, the ratings by the 2014 sample of recent graduates are a bit more favourable than those in the 2004 sample. Despite these increases, however, librarians are still not very likely to agree that their MLIS program provided them with the management, leadership, and business skills required to effectively perform their jobs (33%, 25%, and 16% respectively). With 2 in 5 librarians from both surveys agreeing that their program provided them with the IT skills needed to perform their jobs, the provision of IT skills was rated equally in 2004 and 2014.

Despite the slightly more favourable evaluations of the many different elements of their MLIS program, moreover, 2014 respondents were similarly likely (50% compared to 53%) to indicate that they were "satisfied" or "very satisfied" with the quality of education overall. Other than the fact that the satisfaction scale for this question was modified slightly in 2014, we have no explanation for why the 2014 sample did not indicate greater overall satisfaction with their program despite their higher ratings of individual competencies.

**Table 46: Recent Graduate Evaluations of MLIS Program  
by Survey Year**  
(2014 n=78; 2004 n=70)

<b>Program provided me with . . . <sup>1</sup></b>	<b>Percent Recent Graduate Librarians</b>	
	<b>2014</b>	<b>2004</b>
Generalist skills	69	51
IT skills	42	42
Management skills	33	23
Leadership skills	25	16
Business skills	16	6
Research skills	51	n/a
Problem-solving skills	47	39
Realistic depiction of academic librarian	37	33
I can apply what I learned to my job	51	52
<b>Satisfied with overall quality of education<sup>2</sup></b>	<b>50</b>	<b>53</b>

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree/disagree with the following statements the education you received in your Master of Library and Information Studies program?"

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "very dissatisfied" and 5 meaning "very satisfied" to the question: "Overall, how satisfied are you with the quality of education you received in your MLIS program?"



When asked what could be done to improve the quality of education offered in MLIS programs, 28% of new librarians indicated that there were no improvements needed. The remaining 72% provided 87 suggestions, the results of which are presented in Table 47 along with those of 2004 recent graduates. The most common response comprising 31% of the suggestions is to make the program more practical especially by offering more practicum opportunities. The second most common suggestion offered 22% of the time, was to provide more or better management and business training, and to a lesser extent leadership training.

Before highlighting changes in the suggestions for program improvement over time, it should be remembered that all attempts have been made to reduce the responses to the open-ended question about MLIS program improvement into meaningful categories that can be compared. In doing so, however, nuances in the perspectives of respondents are not captured with the categories presented in Table 47, and as a result, the data should be viewed as representations of the views of the respective survey respondents and should not be interpreted literally. It should also be understood that suggestions preceded by "improved" depict the combination of suggestions for "more" and suggestions for "better." For example, while some respondents specifically stated that the program would be improved with more programming in research skills, others called for improvements in the quality of research skills programming.

That said, there are a few differences worth highlighting. First, 2014 respondents are much more likely than their 2004 counterparts to offer suggestions dealing with the practical aspects of the program (31% compared to 17%). Given that the 2014 sample was slightly more likely than the 2004 sample to agree that their program provided a realistic depiction of what it would be like to work as a librarian in an academic setting (37% compared to 33%), and in light of the similar proportions indicating that they apply what they learned in their jobs (51% and 52%, Table 46), it is unclear why this suggestion was provided more often in 2014 than in 2004. One possibility is that Canadian MLIS programs offer practicum or practicum-like opportunities (e.g., mentoring, job shadowing) less often now than they did 10 years ago, however, we have no data to substantiate this explanation. The Training Gaps Analysis found that as of 2006, all MLIS programs offered practica in addition to other forms of experiential learning such as internships, mentorships, or job shadowing. Whether this has changed or whether these options are less adequate in some way is unknown and beyond the scope of the current project. Nonetheless, the results with respect to the practical aspects of the programs suggest that this issue warrants closer examination.

Conversely, 2014 respondents were much less likely than their 2004 counterparts to suggest that the program would be improved with a better learning environment such as better professors, smaller classes, or more frequent course offerings (5% compared to 35%).

Finally, in accordance with CARL libraries' increased demand for specialized skills, recent librarian graduates are also more likely to indicate that more opportunities to specialize would improve the MLIS program than did those in 2004, none of whom mentioned this suggestion at all (5% compared to 0%).

**Table 47: Recent Graduates' Suggested Improvements to MLIS Program by Survey Year**

(2014 n=87; 2004 n=69)

	Percent Librarians Reporting	
	2014	2004
<b>Hard Skills Training</b>		
Improved management, business, leadership training	22	16
Improved IT training	9	6
Improved research training	5	10
More opportunities to specialize	5	0
<b>Other</b>		
More practicum / practical opportunities	31	17
More up-to-date curriculum / connected to reality of job market	12	15
More theory / librarianship values	5	0
Improved learning environment	5	35
Other	6	1

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on categorized responses to the question "What, if anything, do you think could be done to improve the quality of education offered in MLIS programs?"

From the perspective of CARL libraries' views of MLIS programs, 81% reported that the education provided in MLIS programs equips graduates to a moderate or great extent with the competencies required to work as librarians. This is virtually the same as the 2003 survey (80%); however, it should be understood that the question in the earlier survey did not employ a scale response option but asked for a simple yes/no response.

Though there are insufficient cases to present full answers to the same question asked of institutional respondents about MLIS program improvements, 17 libraries provided 20 responses with little or no relationship between whether or not they agreed that the MLIS programs provide needed competencies and their provision of suggested improvements. Mention was made by a few respondents to improve MLIS curriculum by placing greater emphasis on emerging and specialized skill sets such as GIS, data management, copyright. In contrast to recent graduates, none of the 20 institutional responses touched on providing more opportunities for practicums. Otherwise, the most common response (35%) was to improve management education especially, but also business and leadership-related education, a finding more than two times lower than the 2003 results (84%). The reduced call for library schools to place greater emphasis on management, business, and leadership skills is in line with the aforementioned finding (Chapter 8) that, though these skills are still in high demand, they are now slightly easier competencies to fulfill than they were 10 years ago.

## Training

In light of the most pressing human resources challenge of staff development, participating in continuing education has perhaps never been so important. This is true for all types of staff at all career stages. Given the extensive and wide-ranging IT and specialization requirements of librarians, it is understandable that MLIS programs can only take students to a point in their career development and that the rest is up to staff and their employers. For this reason, participation in all types of training is highest among recent graduates, but in demonstrating the need for continuing and life-long learning in research libraries, participation in IT skills training has been the greatest for librarians educated in the pre-internet, pre-digital era (Table 33).

Fully 86% of CARL libraries agree that their library "promotes a culture of lifelong learning" (compared to 88% in 2003; results not presented in table or figure). Testimony to this statement is the finding that training and development are the most frequently performed of all administrative and management functions undertaken by librarians and paraprofessionals (74% and 48%, respectively; Table 39) and by *other* professionals (75%; Appendix Table 6). Such a high level of engagement in the provision of training by staff is also reflected in Table 48 where we observe that CARL libraries report providing the majority of staff with a wide range of types of training in a wide range of formats.

Overall, the results in Table 48 indicate that librarians are the most likely to be offered training followed by support staff. Not surprisingly, exceptions to this pattern include the greater training opportunities offered to *other* professionals than support staff in management, leadership, business, and research training. Still, it is notable that *other* professionals are less likely than librarians and support staff to be offered professional development opportunities provided by library associations and are less likely to be provided with financial support for doing so. This finding is congruent with the 73% of *other* professionals compared to the 94% of librarians reporting that they attended conferences at least sometimes (Appendix Table 6) and is a finding worthy of further consideration in light of the "feral" label attached to *other* professionals by Neil (2006) and reiterated by others (e.g. Wilder, 2007; Stewart, 2010).

It is also notable that librarians are equally as likely to be provided with management skills training as they are with customer-service related training (68%). As for over-time changes, the provision of training formats and most types of training for librarians is fairly stable. A notable exception is for the provision of leadership development which 66% of CARL libraries offered in 2003 compared to 95% in 2013.

**Table 48: Formats and Types of Training Provided<sup>1</sup>  
by Type of Library Staff and by Survey Year**  
(2013 n=22; 2003 n=25)

	Percent Libraries			
	Librarians		Other Professionals	Support Staff
	2013	2003	2013	2013
<b>Training Formats Offered</b>				
Classroom training	86	84	77	95
On-the-job training	91	96	86	95
Private training/consultancy	73	72	64	55
Training by library associations	100	100	59	73
<b>Types of Training Offered</b>				
Leadership development	95	66	41	27
Technology skills training	95	100	82	100
Research methods training	82	n/a	27	9
Job-oriented skills training	91	92	86	100
Customer-service related training	68	64	41	95
Management training	68	76	59	32
Business skills training	36	n/a	32	27
<b>\$ Support for Conferences<sup>2</sup></b>	<b>95</b>	<b>n/a</b>	<b>73</b>	<b>82</b>

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "yes" responses to the question: "During the past year, did your library provide any of the following training formats or types of job-related training to librarians, *other* professionals, and support staff?"

<sup>2</sup> Based on "yes" responses to the question: "Does your library subsidize, assist, or reimburse librarians, *other* professionals, or support staff for attendance at library association meetings?"

Institutional respondents were also asked if they have a routine method for determining the training needs among librarians to which 41% indicated that they had such a method, a somewhat lower proportion than in 2004 (52%). Among these 9 libraries, most indicated that their determination of training needs was done as part of librarians' annual performance review process, while a few others noted that training requests were initiated by individual librarians. Notably, just 9% of CARL libraries have a formal method for evaluating the effectiveness of training provided to librarians, compared to 4% in 2003.

Before examining the training attitudes and experiences of staff, a final presentation of perceived training needs from the perspective of CARL libraries for different types of librarians, *other* professionals, and support staff is displayed in Table 49.

Differences between the perceived training needs of librarians, *other* professionals, and support staff are not great. More noticeable are the lower training needs of all types of staff in 2013 than in 2003. In some cases these differences are small, while in others more significant. In fact, the 28 percentage point reduction in the perceived need for IT librarians to receive a moderate or great amount of training is a level of 2003 to 2013 change rarely observed in this study and therefore merits further thought. A closer examination of these findings reveals that

this change is more a function of the fact that training needs for IT librarians was extraordinarily high in 2003 (83%), and at 55% is now more similar to the perceived need of training for other types of librarians. This explanation does not gloss over the important training headway made for IT librarians, but rather highlights the magnitude of progress made in the past decade.

**Table 49: Librarians, *Other* Professionals, and Support Staff Needing Significant Amount of Training<sup>1</sup> by Survey Year**

(2013 n=22; 2003 n=23)

	Percent reporting to a Moderate / Great Extent	
	2013	2003
<b>All Librarians</b>	<b>41</b>	<b>52</b>
Public services librarians	50	61
Technical services librarians	50	67
IT librarians	55	83
Collections librarians	32	n/a
Management librarians	55	71
Other librarians	41	n/a
<b>Other Professionals</b>	<b>38</b>	<b>48</b>
<b>Support Staff</b>	<b>36</b>	<b>n/a<sup>2</sup></b>

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "no training" and 5 meaning "a great amount of training" to the question: To what extent do the following groups require ongoing training to meet the needs of your library?"

<sup>2</sup> Results of 63% for 2003 are for paraprofessional staff only.

Having examined training from the perspective of CARL libraries, in Tables 50 and 51 we present the training interests, experiences, and evaluations of librarians, *other* professionals, and paraprofessionals. By way of providing an overall assessment of training, we begin in Table 50 with the results from three global measures of training needs.

With just 3 in 5 librarians and *other* professionals and 2 in 5 paraprofessionals reporting that their library provides them with sufficient training opportunities, it is clear that there is room for improved training opportunities in CARL libraries. The combined education, training, and experience of *other* professionals, however, appears to be more sufficient than this same combination of important factors for librarians or paraprofessionals (93% compared to 81%). That 1 in 5 librarians and paraprofessionals feel that they are inadequately equipped to perform their job effectively, irrespective of whether it is due to a lack of education, training, or experience, is a finding worth attention by CARL libraries. Though this appears to have been the case in 2004 and to the same degree, the 2004 to 2014 decrease among librarians and paraprofessionals agreeing that they have sufficient training opportunities (from 70% to 60%

for librarians and from 49% to 44% for paraprofessionals), while not large, does not indicate a trend of improved opportunities. Moreover, the decrease among recent graduates from 77% to 59% is sufficiently large to warrant concern about the provision of training for librarians (as demonstrated in the previous chapter) with the most interest, and in some ways, the greatest need.

**Table 50: Skill Development & Training Opportunities and Job Preparedness among Librarians (by Career Stage<sup>1</sup>), Other Professionals, and Paraprofessional by Survey Year**

(2014 n=724; 2004 n=867)

Statement <sup>2</sup>	Percent 2014 Respondents Agreeing					
	Career Stage					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para professionals
Job provides opportunity to grow & develop skills (2004)	<b>81</b> (83)	78 (82)	78 (83)	88 (82)	<b>74</b> (n/a)	<b>61</b> (63)
Sufficient training opportunities (2004)	<b>60</b> (70)	59 (77)	58 (68)	65 (70)	<b>59</b> (n/a)	<b>44</b> (49)
Sufficient education, training, & experience to perform job effectively (2004)	<b>81</b> (82)	80 (79)	79 (83)	85 (82)	<b>93</b> (n/a)	<b>81</b> (86)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree/disagree with the following statements about your training, career development, and organizational commitment."

With these respective training needs in mind, Table 51 presents the percentage of librarians, other professionals, and paraprofessionals that have ever participated in different types of training through their current library as well as the percentage who are interested in such training for 2014 and 2004, when available. Some of these results were already presented in the previous chapter with respect to librarians. The following builds upon those findings, not only by placing different types of skills training together in a single table, but also by adding the results for other professionals and paraprofessionals. This enables an assessment of CARL library training from a relative perspective across competencies, occupational groups, and time.

By virtue of the number of different types of training (12) in the table, the results indicate that CARL library staff are engaging in a wide range of training types, a finding congruent with the results showing that these staff are performing a similarly wide range of tasks (Table 29 and Appendix Table 6).

For the most part, the proportion of *other* professionals engaging in the different types of training is similar to that of librarians. Variations in training between professionals and paraprofessionals are as expected with more professionals participating in leadership, management, business, and research skills training and paraprofessionals more likely to have experienced customer-service related training.

The relatively high and effective training participation rate in IT skills (Table 33) and the decreased current training needs for IT staff (Table 49) have already been established for librarians. Table 51 extends these findings by making it clear that all professional and paraprofessional staff are well trained in IT skills. Once again, the slight downward trend in participation since 2004, however, may reflect a slowdown in the pace with which new technologies are being introduced (Edge, 2011).

Among the 5 types of skills training that we have information on both the participation rate and interest rate, the latter is higher than the former for all occupational groups with the exception of the aforementioned IT skills training. Generally speaking, the interest / participation gap is the largest for leadership and research skills training, but it is still apparent for business skills training and for management skills training among paraprofessionals. For example, interest in participating in leadership training is roughly 30 percentage points higher than participation in this type of training across all groups.

**Table 51: Participation<sup>1</sup> and Interest in<sup>2</sup> Training  
Among Librarians, *Other* Professionals, and Paraprofessionals  
by Survey Year**

(2014 n=642; 2004 n=867)

Percent Staff					
Type of Training	2014			2004	
	Librarians	<i>Other</i> Professionals	Para-professionals	Librarians	Para-professionals
<b>Leadership Development<sup>3</sup></b>					
Participated in	30	30	14	34	8
Interested in	62	61	47	n/a	n/a
<b>Management Skills Training</b>					
Participated in	47	58	13	58	20
Interested in	55	61	41	55	43
<b>Supervisory Skills Training</b>					
Participated in	35	45	21	n/a	n/a
<b>Business Skills Training</b>					
Participated in	16	25	10	n/a	n/a
Interested in	44	44	34	37	37
<b>IT Skills Training</b>					
Participated in	78	79	78	89	90
Interested in	57	61	71	92	72
<b>Research Skills Training<sup>4</sup></b>					
Participated in	24	12	5	n/a	n/a
Interested in	61	39	45	n/a	n/a
<b>Job-Oriented Skills Training</b>					
Participated in	80	69	80	85	77
<b>Customer Service Training</b>					
Participated in	46	47	60	50	55
<b>Other Skills Training</b>					
Participated in	76	64	41	85	39
<b>Mentorship Training</b>					
Participated in	14	6	8	10	19
<b>Job Rotation</b>					
Participated in	6	4	8	10	24
<b>Job Sharing</b>					
Participated in	3	2	9	5	31

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on "yes" responses to the question, "For the following list, first indicate if you have ever participated in the type of training through your current workplace."

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree/disagree with the following statements about your training, career development, and organizational commitment."

<sup>3</sup> Includes participation in NELI, the Leadership Program at the University of Saskatchewan, and other leadership training.

<sup>4</sup> Includes participation in the CARL Research Institute, and other research-related training.



The results in Table 51 also indicate that engagement in job strategies training, including mentorship training, job rotation, and job sharing, is rare and is also decreasing. Institutional results presented in the next chapter similarly demonstrate that the offering of such job strategies is rare and has decreased in the past 10 years (Table 58). This is of concern since these formats have been shown to be beneficial as more than just methods of training. Job rotation, for example, has been shown to increase employee versatility and allow the opportunity to view employees under a range of situations, thereby permitting a better gauge of skills and abilities (Eriksson and Ortega, 2006). Lowe (2014), who maintains that differences in inter-generational work values are often over-stated, found that two-way job mentoring helps to bridge generations by introducing a format that values their respective perspectives and contributions. The low rates of mentorship training are especially concerning given the advantages associated with mentoring for the development of leadership skills and abilities. Indeed, a study of leadership engagement factors found that three-quarters of new librarian professionals were interested in engaging in mentorship programs (DeLong, 2009).

### **Career Advancement and Training**

We conclude this examination of training with a presentation of findings from the Practitioner Survey that bear on training needs and interests as they pertain to career advancement of librarians. This provides an indication of training needs that stem from promotion as opposed to current job performance.

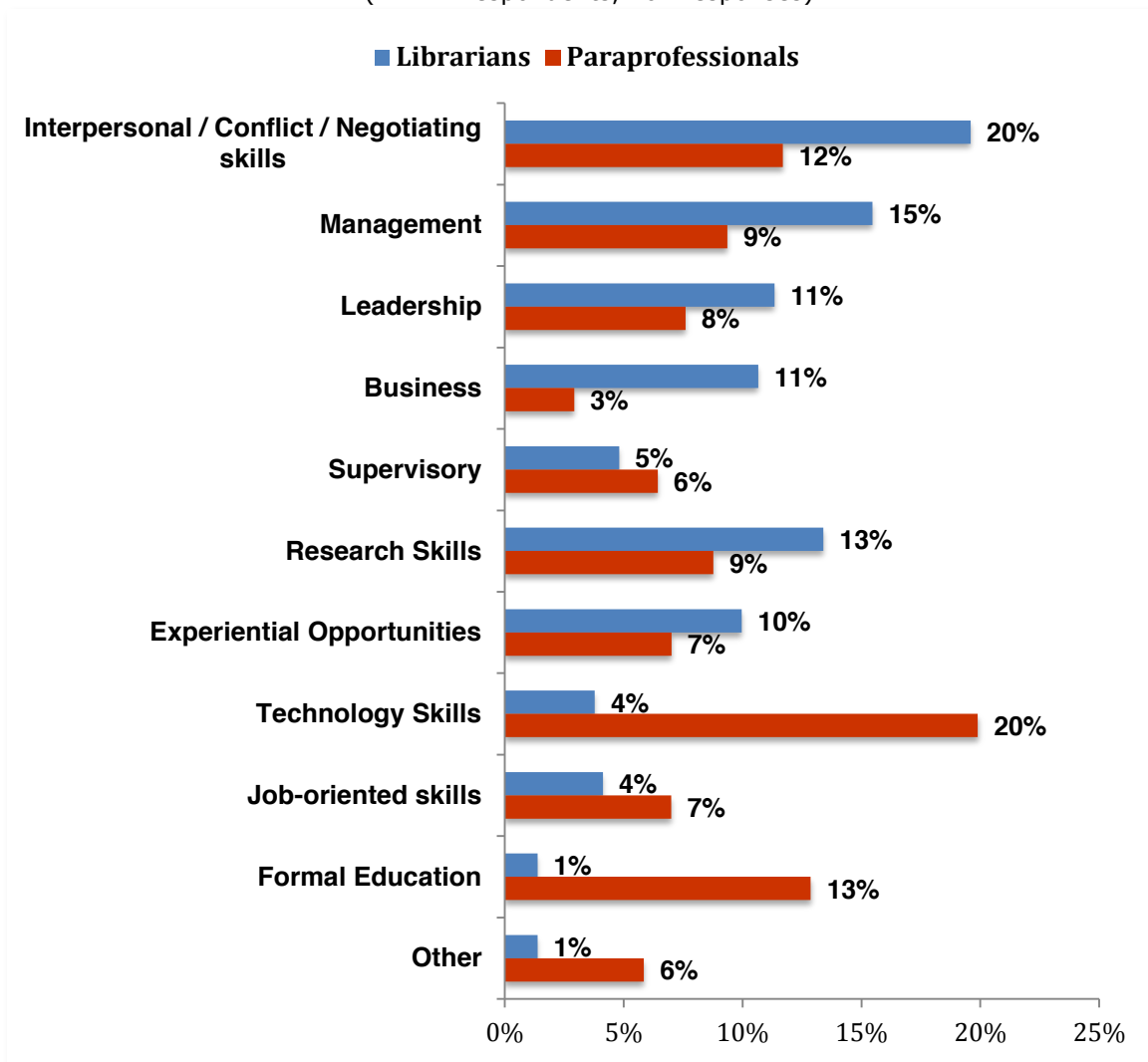
Our calculations from combining the results of two questions reveal that 25% of librarians and 39% of paraprofessionals are interested in moving into a more responsible position, but do not feel qualified to do so. With this in mind, Figure 25 presents the categorized results to an open-ended question asking what kind of training would be needed to move into a higher level position. Insufficient responses preclude the ability to present the results for *other* professionals, however, 44% (144) of librarians provided 290 responses and 41% (100) of paraprofessionals provided 171 responses. It also bears mentioning that the findings in Figure 25 are not just a measure of the skills needed for promotion, but are also to some extent an indication of the kind of training that might be needed among the 40% of librarians and paraprofessionals stating that they don't have sufficient training opportunities as well as the 20% of these staff members indicating that they don't have the education, training, or experience required to effectively perform their current jobs (Table 50).

Somewhat surprisingly, interpersonal, conflict, or negotiation training comprises 20% of all librarian responses. Though the category includes interpersonal skills (which includes how to develop and maintain relationships inside and outside the library), the vast majority of these responses specifically stated the need for training in conflict management or in negotiation. More than 2 in 5 responses (42%) provided by librarians were for training in management, leadership, business, or supervisory skills, and 13% in research skills. Paraprofessionals, on the other hand, were much more likely to indicate the need for IT skills (20%) or formal education (13%).

The latter finding builds upon several other indicators of paraprofessionals becoming professionals. First, the increase in recent graduates who have also earned a library technician certificate or diploma from 2% to 14% suggests a trend of previous paraprofessionals earning their MLIS to work as professionals (Table 44). Second, responses to another question not yet presented reveal that 24% of paraprofessionals are, in fact, interested in obtaining an MLIS compared to 27% in 2004. The route to librarianship from paraprofessional status is not a new finding. Results from the original 8Rs suggest that librarians entered the profession mainly because the benefits of doing so were learned from previous library experience and most commonly from working as a paraprofessional.

**Figure 25: Training Needed for Promotion<sup>1</sup>  
Among Librarians and Paraprofessionals**

(n=244 respondents, 461 responses)



Source: 2014 Practitioner Survey

<sup>1</sup> Based on categorized responses to the open-ended question: "In thinking about your future career, what kind of training would provide you with the most important skills required to move into a higher position?" Results for *other* professionals are not presented due to insufficient cases.

Another 13% of librarian responses expressed the need to have further training in research and, somewhat surprising, 9% of paraprofessionals express this same need. Of further note is the finding that 10% of librarians (7% of paraprofessionals) indicated that they did not necessarily need formal training, but that they would benefit from a chance to learn through experience. Many of these respondents simply noted that they needed experience, but a good portion specified such experiential options as mentorship, job rotation, and job sharing, which, as noted above, are rare alternative training formats in CARL libraries. These findings, in combination with recent graduates' suggestions for MLIS program improvements to provide more practicum opportunities, suggest that experiential learning modes are viewed by practitioners as valuable instruction methods for both formal education and on-the-job training.

## **Summary of Major Findings & Conclusions**

When comparing changes in the three possible routes that CARL staff can acquire the skills and abilities needed for them to effectively perform their jobs in the 21<sup>st</sup>-Century research library (formal education, training, experiential learning), most noticeable is the increase that has occurred in their formal education. With 37% of 2014 librarians having earned two graduate degrees and 3% earning three graduate degrees (compared to 28% and 1%, respectively, in 2004) and 71% of 2014 paraprofessionals earning an undergraduate or graduate degree (compared to 60% in 2004), it is clear that CARL library staff are making an important contribution to their development (Table 44).

Recent ratings by graduates of how well MLIS programs provide generalist skills are favourable, and their evaluations of the individual competencies learnt in the program have increased between 2004 and 2014. Hovering around 50%, however, their overall evaluation of the quality of education is the same as it was in 2004 (Table 46). Though we have seen slight improvements in the evaluation of management, leadership, and business skills taught in MLIS programs, a good share of both recent graduates (22%; Table 47) and institutional representatives (35%; results not presented in table or figure) targeted these skills as areas that need improvement. Of even greater importance to recent graduates, however, is the need to link MLIS programs more closely to the practice (Table 47). This finding could explain the consistency in overall ratings of MLIS programs, especially given that just 37% of recent graduates agreed that the program provided them with a realistic depiction of what it is like to work as an academic librarian. Presumably, a "realistic depiction" is more readily conveyed experientially than in the classroom. The interest in learning about the profession from a firsthand perspective is understandable, but it highlights the tension between maintaining librarianship as a profession while at the same time ensuring that the two years in graduate school adequately prepare students for the academic library labour market.

Ten years have elapsed since the 8Rs first revealed that libraries need their staff to receive more education in management, business, and leadership; and almost as much time has passed since the 8Rs Training Gaps Analysis made the explicit recommendation for library schools to increase their curriculum content in management and leadership. The results of the *8Rs Redux* suggest that, though respondents see improvement, library schools still need to

examine more fully this documented need. A more definitive conclusion would entail a closer examination of library school curricula changes over the past decade; however, the conclusions of the 8Rs Training Gaps Analysis conducted in 2006 revealed that most deans and directors of Canadian library schools recognized the importance of managerial and leadership skills to libraries, though there were diverging opinions about the appropriateness of inculcating management and especially leadership skills in the classroom. Current debate continues to focus upon whether leadership skills are appropriately taught in library school programs or left to the workplace (Phillips, 2014).

Training is not just about equipping staff with the skills and abilities needed for their current positions, but it is also about preparing them for changes in their current position and for more responsible, higher level, or simply different positions. The finding that 1 in 5 librarians and paraprofessionals do not feel adequately equipped to perform their job effectively (Table 50), combined with the fact that a larger proportion of staff are interested in engaging in training than have actually done so (Table 51), suggests that while training is adequate for some staff, important training gaps are evident for others. It thus behooves CARL libraries to better assess the training needs of their staff on a continuing basis. As it stands, while performance evaluations are conducted in about 70% of libraries, just 2 in 5 reported that they routinely assess the training needs of their librarians, and even fewer (9%) evaluate the effectiveness of such training. At the same time, 86% of institutional respondents reported that their library promotes a culture of lifelong learning.

### **Strategic Human Resources Planning Implications**

- Understanding that roles in Canadian research libraries are changing and will continue to evolve, and that library organizations will continue to define competencies associated with new and changing roles, education and training of all library staff will continue to be critical determinants in the success of CARL libraries as they support change and adaptation as well as learning and growth. Recruitment can also provide for new roles and identified competencies, but this is not always possible given the budget picture facing many CARL Libraries. As recommended in 2004, both practitioners and institutions must commit to education and training as an ongoing necessity.
- CARL libraries must also develop mechanisms to assess the on-going training and development needs of their library staff on a continuing basis. Admittedly, this is not an easy task as these needs are variable across individuals and can be different depending upon career stage. Training and development needs must also be assessed in light of the needs of the entire organization. This raises two burning questions: How do practitioner interests and needs align with the interests and needs of the organization? And, where should practitioners and institutions spend their often scant resources of time and money? CARL libraries must clearly communicate their directions and set training and development agendas congruent with these directions. Training and development programs must also be evaluated to see if they are indeed effectively addressing staff and organizational needs

- There is a seeming lack of congruence between the institutional perspective that many training opportunities are available and the perspective of practitioners that there are gaps between their interest in specific types of training and whether they have had the opportunity to participate in such training (especially for leadership development and research skills training, but not for IT skills). Perhaps at least a partial answer lies in advising libraries to be very clear about the connection between needed competencies and the training and development programs that are being offered. If there are staff interests that will not be met because of other institutional priorities for training and development, staff can then elect to fulfill their interests through outside training opportunities. Of course, libraries will also want to pay close attention to staff interests, as these may be driven by emerging needs that are not necessarily easily or readily identified as an institutional priority.

# CHAPTER 10: QUALITY OF WORK LIFE AND JOB SATISFACTION

## Introduction

The original 8Rs revealed a relatively high level of job satisfaction among librarians and paraprofessionals in CARL libraries. The role changes that have occurred in the 10 years since the original study, however, may have had some effect on the quality of work life and job satisfaction. Do these changes mean that CARL library staff are now more satisfied with their jobs, perhaps due to an overall up-skilling and increase in the variety and level of interesting and challenging work? Or, is there a trend toward lowered satisfaction due to increased job demands and workloads?

But, job satisfaction is not just about what people do in their jobs. Quality of relationships, pay, benefits, promotional opportunities, empowerment, opportunities for growth, work-life balance, and levels of stress, to name a few, are key determinants of how we view our work. In this regard, downsizing and restructuring can be associated with reduced levels of trust, commitment, and worker influence (Lowe and Schellenberg, 2002). Quality of work life also has implications for recruitment, perhaps especially so in the relatively small circle of Canadian academic libraries. Since recruitment does not appear to be a problem for the vast majority of CARL libraries, this investigation of work quality and job satisfaction is perhaps best understood as it relates to employee motivation, morale, productivity, and even innovativeness.

The focus in this analysis is on both extrinsic rewards (e.g., pay, benefits, and promotional opportunities) and intrinsic rewards (e.g., equality of treatment, work life balance, relationships, empowerment). We begin with a series of global results including overall job satisfaction, what staff like the best about their jobs, what they dislike the most, and what is most important to them in a job. For the most part, the analysis of quality of work life and job satisfaction is from the perspective of practitioners, however, when available and relevant, institutional data are provided to illustrate workplace strategies offered by CARL libraries. Typically, the institutional data precedes the practitioner data so that comparisons can be made between what libraries offer and how staff view these workplace provisions. After summarizing the major findings of each section, and after identifying key contributors to job satisfaction, the chapter concludes with a new area of examination, that of librarian identity.

## Global Indicators of Job Satisfaction

Table 52 presents the proportion of librarians, *other* professionals, and paraprofessionals providing responses of either "very satisfied" or satisfied" to the question, "How satisfied are you with your current job?" Looking down the first column, it is clear that the vast majority of librarians at all career stages are satisfied with their jobs overall and that, at 52%, senior librarians are the most likely to be "very satisfied." *Other* professionals express the highest levels of satisfaction (88%) and paraprofessionals the lowest (76%). Over time stability in the level of job satisfaction is evident for most points of comparison in the table with the exception

of the decrease in the proportion of mid-career librarians reporting to be "very satisfied" from 48% in 2004 to 32% in 2014. Despite this change, however, the dominant story is that the high levels of satisfaction found in 2004 are applicable to CARL staff in 2014.

**Table 52: Overall Job Satisfaction Among Librarians (by Career Stage<sup>1</sup>), Other Professionals, and Paraprofessionals**

(2014 librarian n=355, *other* professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

	Percent Staff Satisfied					
		2014			2004	
	Total Satisfied	Very Satisfied <sup>2</sup>	Satisfied <sup>3</sup>	Total Satisfied	Very Satisfied <sup>2</sup>	Satisfied <sup>3</sup>
Librarians	<b>80</b>	39	41	<b>82</b>	47	35
Recent Graduates	81	38	43	75	32	43
Mid-Career	78	32	46	83	48	35
Senior	81	52	29	83	54	29
<i>Other</i> Professionals	<b>88</b>	41	46	n/a	n/a	n/a
Paraprofessionals	<b>76</b>	31	45	<b>74</b>	33	41

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>2</sup> Based on responses of 1 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

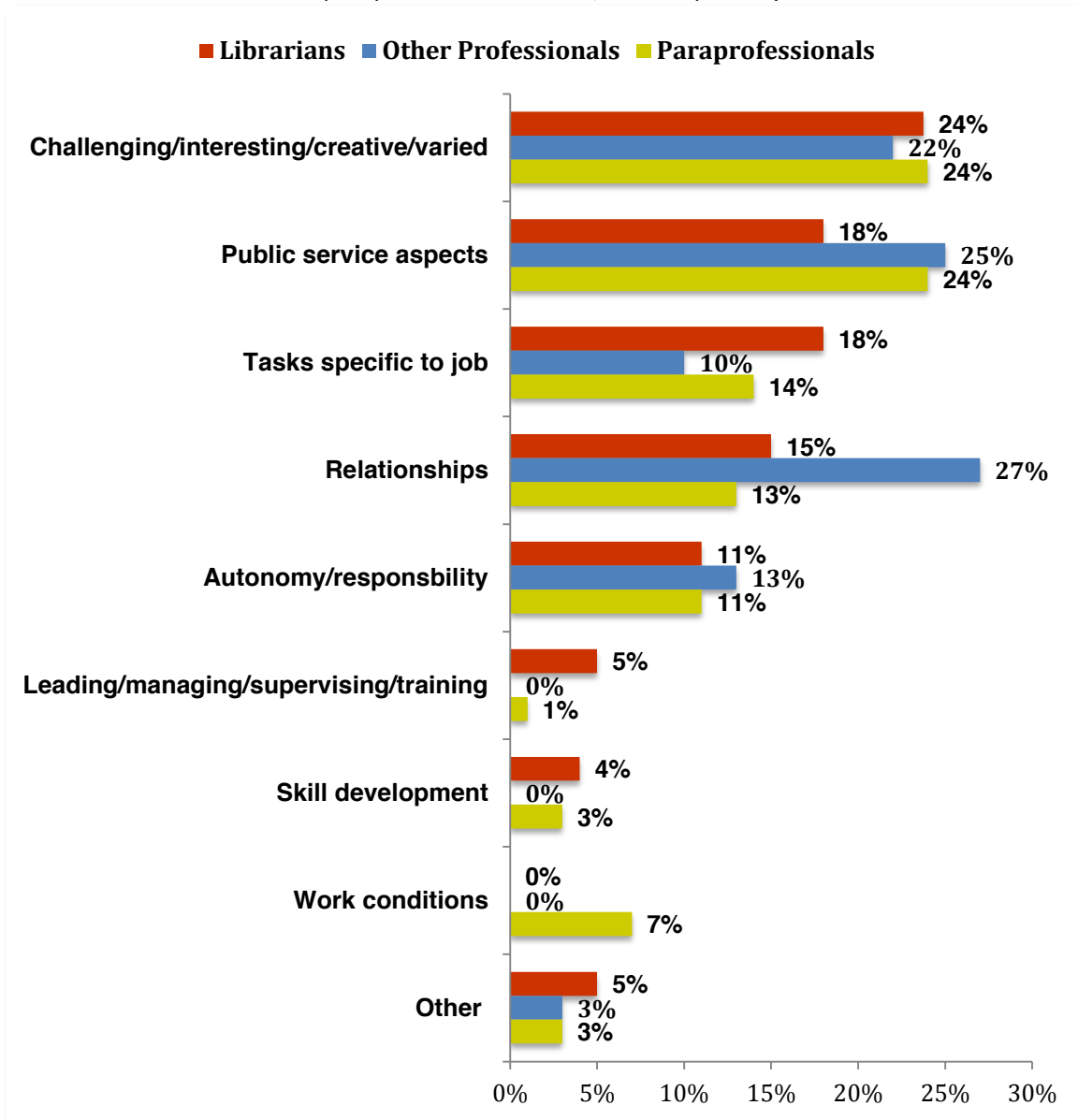
<sup>3</sup> Based on responses of 2 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

When asked the open-ended question, "What aspects of your job do you like the most?" 549 librarians, *other* professionals, and paraprofessionals provided 740 aspects, a number that alone indicates CARL staff are satisfied with their jobs due to several different factors. Most predominant of these is the challenging, interesting, creative, and varied aspects of the jobs held by librarians, *other* professionals, and paraprofessionals alike. Many simply indicated the variety of work, while others specified that they liked the problem solving aspects or that their work is not only interesting, but it is intellectually challenging and requires creative solutions. Yet others referred specifically to the excitement that comes with working in cutting edge and emerging technologies.

The public service aspects of helping and supporting faculty and students are also well-liked features of jobs for many staff, perhaps most interestingly so for *other* professionals, 25% of whom indicated this as an important aspect compared to 18% of librarians and 24% of paraprofessionals. Nearly 3 in 10 *other* professionals also provided responses pertaining to their positive relations with co-workers and with team work compared to 15% of librarians and 13% of paraprofessionals. These two findings provide some suggestion that formal MLIS or library technician education are not prerequisites for holding some of the values and attitudes of librarianship such as helping others and doing so in a collegial environment.

Of final note, Figure 26 shows that only paraprofessionals made reference to liking their jobs because of the working conditions including work hours, flexibility, work-life balance, and work location.

**Figure 26: Most-Liked Aspects of Job  
Among Librarians, Other Professionals, and Paraprofessionals**  
(librarian n=289 respondents, 379 responses; other professional n=48 respondents, 63 responses;  
paraprofessional n=212, 298 responses)



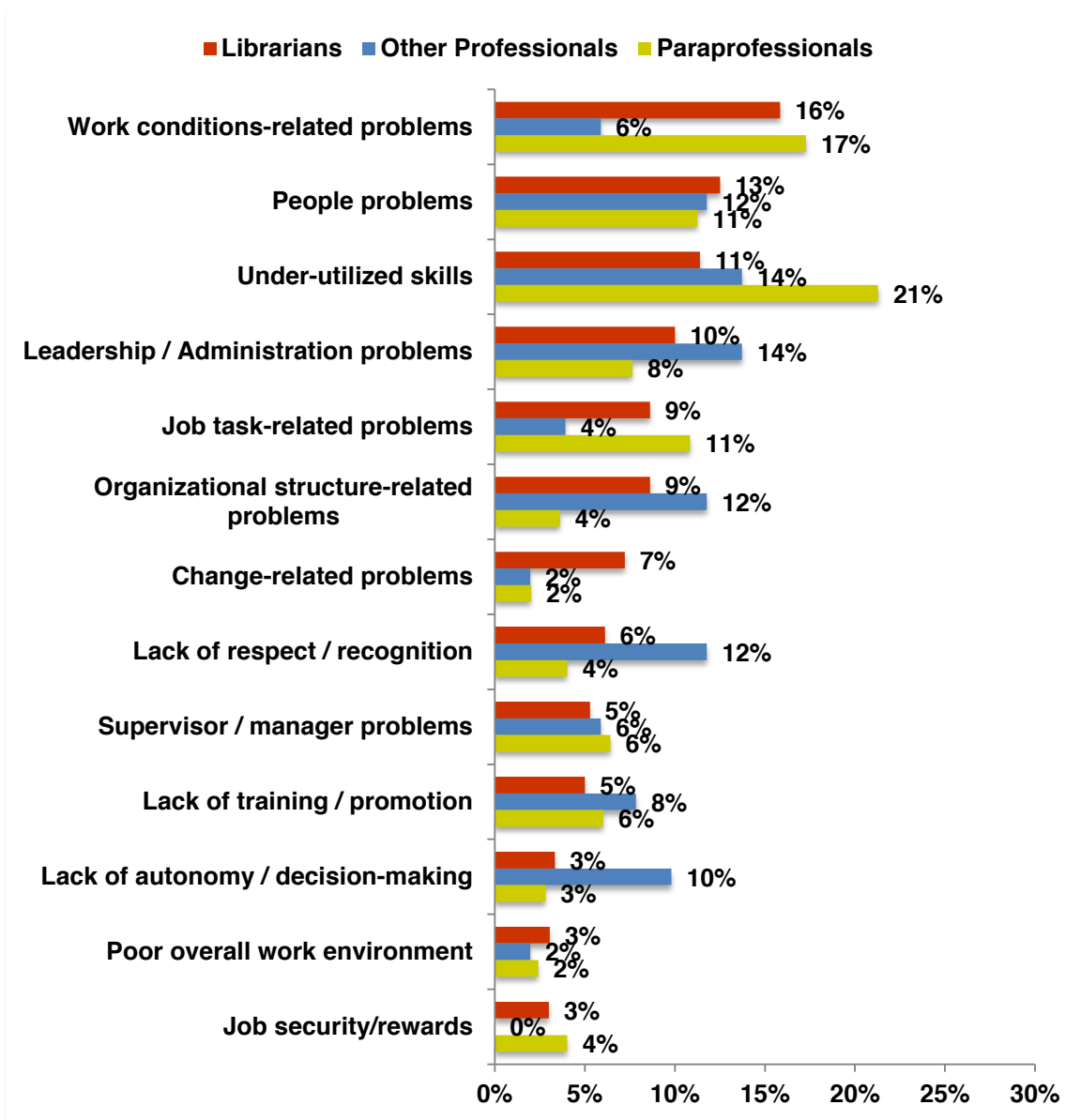
Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on categorized responses to the question, "What aspects of your job do you like the most?" Percentages are calculated using number of responses.



Practitioners were also asked what they disliked the most about their jobs, the categorized responses of which are presented in Figure 27. Compared to the question on what they liked the most, fewer respondents (512 compared to 549) provided fewer aspects (660 compared to 740) to this question, an indication in itself of job satisfaction.

**Figure 27: Most Disliked Aspects of Job**  
**Among Librarians, Other Professionals, and Paraprofessionals**  
 (librarian n=272 respondents, 360 responses; other professional n=44 respondents, 51 responses;  
 paraprofessional n=196 respondents, 249 responses)



Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on categorized responses to the question, "What aspects of your job do you like the least?" Percentages are calculated using number of responses.

Differences in responses between occupational groups are also more noticeable in Figure 27 than in Figure 26, especially between librarians and paraprofessionals on the one hand and *other* professionals on the other. For example, *other* professionals stand out as being the most likely to comment on leadership or administration problems (e.g. lack of leadership or poor decision-making), organizational-structure related problems (e.g., disjoint between departments or libraries, bureaucracy, hierarchy), lack of respect or recognition, and lack of autonomy or decision-making powers. They are also the least likely to feel that work conditions, which includes anything from scheduling, location, and hours to problems with physical conditions, to feeling overworked or stressed, are disliked aspects of their job.

For all three occupational groups, roughly one in ten disliked aspects of their job that pertain to "people problems" which includes difficult or underperforming colleagues or supervised / managed staff. Paraprofessionals were notably more likely to indicate that their under-utilized skills were a disliked aspect of their jobs (21% compared to 11% for librarians and 14% for *other* professionals). Reference was often made to performing too many mundane and rudimentary tasks.

Practitioners were also asked about the importance of a series of 32 aspects of their jobs, the top ten of which are presented in Table 53 below and ranked in order of most important. The results reiterate the importance staff attach to human interactions at work, such as having functional and respectful relationships. Otherwise, differences between librarians, *other* professionals, and paraprofessionals are nominal since they represent just a handful of respondents of either occupational group who responded differently. Of the 32 possible job aspects, 8 *other* professionals and 6 paraprofessionals are the same most important aspects as those for librarians, with variation for these aspects only in terms of ranking. Being treated with the same respect as librarians for *other* professionals, as well as having good relationships with librarians for paraprofessionals are, of course, unique to these two groups. Paraprofessionals are also notable for attributing the greatest importance to work-life balance and job security.

**Table 53: Top 10 Most important Job Elements<sup>1</sup> Among Librarians, Other Professionals, and Paraprofessionals**  
(librarian n=355, other professional n=62, paraprofessional n=301)

<b>Librarians</b>	<b>Other Professionals</b>	<b>Paraprofessionals</b>
Good relationship with supervisor	Good relationship with administration	Treated with respect by superiors
Treated with respect by superiors	Good relationship with supervisor	Good relationship with supervisor
Good relationships with coworkers	Earn a fair salary	Earn a fair salary
Adequate benefits	Participate in decisions about my area	Adequate benefits
Decisions about how I conduct my work	Adequate benefits	Good relationships with co-workers
Earn a fair salary	Treated with same respect as librarians	Work-life balance
Opportunity to grow and learn new skills	Decisions about how I conduct my work	Opportunity to grow and learn new skills
Task variety	Good relationships with co-workers	Job security
Good relationship with administration	Opportunity to grow and learn new skills	Treated with same respect as librarians
Participate in decisions about my area	Work-life balance	Good relationship with librarians

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

The overall conclusion of the results presented in Tables 52 and 53, and in Figures 26 and 27, is that most professional and paraprofessional staff are satisfied with their work and especially with the challenging, varied, and public service aspects of their jobs. These positive ratings and attributes can be attenuated, however, in the absence of respectful and equal treatment and relationships. Furthermore, while some inter-occupational differences have been highlighted above, the similarities in responses serve as a reminder of the more general human resource principals that challenging work and good relationships are the cornerstones of job satisfaction. Added to these elements in the library setting is the gratification that comes with providing a public service, irrespective of educational background.

Along with other additional measures, each of the elements listed in Table 53 are further examined in their relevant sections of this chapter (see Appendix Tables 10 to 13 for results of all importance job satisfaction measures paired with their provision).

## **Extrinsic Rewards**

Though it is now commonly understood that employees value intrinsic rewards (e.g., relationships of respect and trust and work that is rewarding, interesting, and participatory) over extrinsic ones (e.g., salary, benefits, and promotional opportunities), having a job that pays well is still very important. Nonetheless, compared to private sector employees, those

working in the public sector have been repeatedly found to place a lower value on financial rewards (Boyne, 2002; Wright, 2001).

Table 54 displays the percentage of libraries that provide each of six benefits to their professional and support staff, 42% of whom are paraprofessionals. The table demonstrates that a large portion of librarians are receiving benefits akin to faculty benefits. Otherwise, most important to note is the increase in the percentage of libraries offering education leaves to librarians (from 77% to 91%). This change likely reflects policy or collective agreement changes. Since all librarians in 2003 were offered medical, life / disability insurance, and pension plans benefits, these benefits were not asked about in 2013.

**Table 54: Provision of Benefits<sup>1</sup> to Librarians, *Other* Professionals and Support Staff by Survey Year**  
(2013 n=22; 2003 n=25)

<b>Benefits</b>	<b>Percent Libraries</b>			
	<b>Librarians</b>	<b><i>Other</i> Professionals</b>	<b>Support Staff</b>	
	<b>2013</b>	<b>2003</b>	<b>2013</b>	<b>2013</b>
Research leaves	77	n/a	n/a	n/a
Education leaves	91	77	36	41
Sabbaticals	68	73	n/a	n/a
Tenure	67	65	n/a	n/a
Elder care leaves	32	n/a	27	32
Childcare services	36	n/a	36	36
Childcare subsidies/reimbursements	18	n/a	18	14

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "yes" responses to the question: "Which of the following benefits are at least partially funded by your organization for librarians, other professionals, and support staff?"

Our examination of extrinsic rewards excludes the actual salaries of staff since these data are collected more rigorously elsewhere (ARL and CARL Annual Salary Surveys). The analysis of salaries in the original 8Rs study revealed that CARL librarians earned, on average, higher annual salaries than librarians in any other sector. Paraprofessionals were found to earn roughly 57 cents for every dollar earned by librarians (median annual salaries of \$38,000 compared to \$67,000). Accordingly, 80% of librarians and 56% of paraprofessionals felt that they earned a fair salary. With respect to paraprofessionals, it was further revealed that in contrast to what we might expect, recent paraprofessional graduates were the most satisfied with their pay due to their comparatively high salaries for starting positions (median of \$35,500 compared to median of \$40,000 among senior paraprofessionals). Differences between librarian and paraprofessional satisfaction levels with their benefits were much smaller (86% of librarians and 79% of paraprofessionals were satisfied with their benefits).

These findings along with the results from 2014 respondents are presented in Table 55. Satisfaction with salaries is highest among librarians and, as we might expect, increases as career stage increases. Satisfaction with salaries has increased since 2004, most notably

among paraprofessionals (from 56% to 68%). Paraprofessionals are also noteworthy for their relatively low levels of perceived job security, as are recent graduates (53% and 56%, respectively, agreeing that their jobs will continue). These staff may consider themselves more vulnerable to layoffs and recent graduates may also be more concerned about their job security since 30% are working in temporary positions (Figure 17).

**Table 55: Satisfaction with Extrinsic Rewards Among Librarians (by Career Stage), Other Professionals, and Paraprofessionals by Survey Year**

(2014 librarian n=355, other professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

<b>Percent Staff Agreeing Benefit Adequate<sup>1</sup></b>						
	<b>Librarian Career Stage<sup>2</sup></b>					
	<b>All Librarians</b>	<b>Recent Graduates</b>	<b>Mid-Career Librarians</b>	<b>Senior Librarians</b>	<b>Other Professionals</b>	<b>Para-professionals</b>
<b>Salary<sup>1</sup></b>	83	74	84	88	66	68
(2004)	(80)	(68)	(79)	(86)	(n/a)	(56)
<b>Benefits<sup>2</sup></b>	85	82	84	91	76	83
(2004)	(86)	(84)	(86)	(87)	(n/a)	(79)
<b>Job Security</b>	64	56	65	68	65	53
(2004)	(69)	(63)	(71)	(54)	(n/a)	(59)
<b>Work-life Balance</b>	57	64	54	56	75	75
(2004)	(61)	(79)	(57)	(58)	(n/a)	(74)
<b>Eligible for Tenure</b>	50	27	53	62	n/a	n/a
(2004)	(71)	(47)	(74)	(78)		
<b>Eligible for Continuing Appt.</b>	77	69	75	88	n/a	n/a
(2004)	(85)	(65)	(87)	(92)		

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

## **Promotion and Growth Opportunities and Interests**

Training opportunities have an important influence on whether staff feel supported and whether they are provided with the resources required to meet promotion and growth aspirations. These opportunities are also important determinants of job satisfaction. Findings from the previous chapter pointed toward a gap between training interests and needs on the one hand, and training opportunities and participation on the other, especially among recent graduates who have the most interest and in some ways the greatest need. We also already know that opportunities for growth are one of the most important aspects of jobs for CARL staff (Table 53). However, are they similarly interested in promotion, and are opportunities for promotion provided? We begin addressing the latter by examining institutional data on promotional opportunities and barriers to promotion in Table 56.

Even though half of CARL libraries reported that their current promotional opportunities are better now than they were 5 years ago, only 2 in 5 rated their current promotional opportunities favourably (as good or excellent), down from 3 in 5 libraries in 2003. Other results in the table suggest that the main explanation for this finding is due to limited librarian turnover (83%). Librarians are remarkable for their workplace tenure with many often retiring from the very same library that they started working in when launching their careers. The original 8Rs study revealed that CARL librarians had among the highest tenure rates, with 83% having worked at their current library for more than 10 years. Hence, turnover occurs primarily as a result of retirements. With 30% of librarian staff retiring between 2003 and 2013, we would expect promotional opportunities to have increased since 2003 rather than the reverse situation that has occurred. In fact, if there was ever a time in which librarians should be advancing into higher level or more responsible positions, it should have been in the last 10 years.

But, as suggested from the results shown in Table 56, budget restrictions and hiring freezes mitigate turnover and ultimately promotional opportunities. Further, it might be recalled that 3 in 10 retiring librarian positions were not replaced and another 5 in 10 positions were replaced with an external candidate (Table 12). Responses to an open-ended question posed to institutional respondents indicated little or no concern about limited turnover rates, but concern was expressed about the non-renewal of retiring library positions.

Also notable is that all four possibilities listed in the table are currently viewed as barriers by a larger proportion of libraries than they were in 2003. We can infer, therefore, that the limited librarian turnover serving as a barrier to promotion among 83% of libraries exists partly because of increasing budget-related problems (both restrictions and hiring freezes). It's not as clear whether organizational layering / flattening is as directly a result of budgets.

**Table 56: Librarian Promotional Opportunities and Barriers to Promotion by Survey Year**

(2013 n=24; 2003 n=25)

	Percent Libraries	
Promotional Opportunities	2013	2003
Better/Much better than 5 years ago <sup>1</sup>	50	52
Currently good / excellent <sup>2</sup>	38	60
Barriers to Promotion <sup>3</sup>		
Limited turnover	83	68
Budget restrictions	79	56
Hiring freeze	54	12
Organizational delayering / flattening	54	36

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "much worse" and 5 meaning "much better" to the question: "How would you rate the current promotional opportunities for librarians compared to 5 years ago?"

<sup>2</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "poor" and 5 meaning "excellent" to the question: "How would you rate the current promotional opportunities for librarians?"

<sup>3</sup> Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question: "To what extent do the following items contribute to a lack of promotional opportunities for librarians?"

Just 51% of librarians indicated that they are provided with opportunities to advance their careers. Hence, not only are promotional opportunities viewed as limited by institutional respondents, but the results in Table 57 suggest that staff view promotional opportunities as similarly limited. The results appear to be somewhat incongruent with the interests of librarians, 69% of whom indicated that career advancement is important. At the same time, a large minority (45%) would be happy to spend the rest of their career in their current position, and just 42% are interested in a more responsible position.

For the most part, differences in the aspirations among librarians at the three stages of their careers are as we would expect, with career advancement interests highest among recent graduates and lowest among senior librarians. For example, Table 57 shows that 92% of recent graduates view career advancement as important compared to 68% of mid-career librarians and 51% of senior librarians. A noteworthy exception to this pattern is the finding that recent graduates are equally as likely as mid-career librarians to indicate that they would be happy to spend the rest of their career in their current position (34% and 36%). Interestingly, twice as many recent graduates in 2014 than in 2004 (34% compared to 17%) felt this way about staying in their current position. Given the high level of interest in career advancement (92%), this shift is more likely to stem from having greater satisfaction with one's current job (Table 52) than from a shift in the complacency of new librarians. The findings also suggest that though career advancement is important to the CARL cohort of new librarians, it is not an essential ingredient to job "happiness" for most of these staff members.

With lower proportions of staff interested in more responsible positions than in career advancement, career advancement also does not appear to necessarily equate to greater responsibility, not only for recent graduates, but for all career stages and occupations.

The results in Table 57 reveal a gap between the interests in and provision of career advancement opportunities for all staff, but particularly for *other* professionals, recent graduates, and paraprofessionals. With respect to *other* professionals, 77% indicated that career advancement is important, but only 31% reported that they are provided with such opportunities, for a difference of 46 percentage points.

Lastly, a comparison of the results in Table 57 with those presented in Tables 50 and 53 indicate that growth and skill development are more important than promotional opportunities to librarians: 95% of librarians agreed that opportunities to grow and learn new skills is important, ranking this as one of ten most important elements in a job (Table 53) compared to just 69% responding similarly about opportunities for career advancement (Table 57). And, opportunities for growth are better than are opportunities for advancement: 81% agree that their job provides opportunities to grow and learn new skills (Table 50) compared to 51% responding similarly about career advancement (Table 57).

**Table 57: Career Goals and Advancement Among Librarians (by Career Stage), Paraprofessionals, and *Other* Professionals<sup>1</sup> by Survey Year**

(2014 librarian n=355, *other* professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

Statement	Percent Staff Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	<i>Other</i> Professionals	Para-professionals
Opportunities provided for career advancement (2004)	<b>51</b> (56)	49 (61)	52 (54)	51 (48)	<b>31</b> (n/a)	<b>23</b> (25)
Important to have job that allows career advancement (2004)	<b>69</b> (69)	92 (88)	68 (65)	51 (54)	<b>77</b> (n/a)	<b>69</b> (50)
Happy to spend rest of career in current position (2004)	<b>45</b> (45)	34 (17)	36 (50)	73 (67)	<b>39</b> (n/a)	<b>66</b> (41)
Interested in more responsible position (2004)	<b>42</b> (38)	59 (56)	43 (34)	25 (22)	<b>55</b> (n/a)	<b>52</b> (51)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.



## Job Attributes

Healthy workplaces and quality of work life is evident when work is challenging and meaningful (Lowe, 2010b). Leadership and organizational culture are key in this respect, but job strategies such as job enrichment and rotation are also known methods that make work more interesting, rewarding, and challenging, in addition to offering ways to develop skills. These types of initiatives can result in mutual gains for both employees and employers in terms of greater job satisfaction and productivity.

Table 51 already demonstrates that participation in alternative job strategies is rare and decreasing. The results in Table 58 showing also indicates them to be increasingly infrequent strategies: about half as many libraries provided each of the four possible job strategies for librarians in 2013 than in 2003. With the exception of the use of job rotation for support staff, the job strategies are even less likely to be provided to *other* professionals and support staff.

**Table 58: Provision of Alternative Job Strategies<sup>1</sup> to Librarians, *Other* Professionals, and Support Staff by Survey Year<sup>2</sup>**  
(2013 n=22; 2003 n=25)

Alternative Job Strategies	Percent Libraries			
	Librarians		<i>Other</i> Professionals	Support Staff
	2013	2003	2013	2013
Job mentoring	32	64	14	14
Job enrichment	27	64	27	18
Job rotation	18	32	9	27
Job sharing	0	28	0	18

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "yes" responses to the question: "Which of the following job strategies are provided to librarians, *other* professionals, or support staff?"

<sup>2</sup> In 2003, the question was asked only about librarians.

Despite that these job enhancement strategies are not commonly practiced in most CARL libraries, Table 59 demonstrates that jobs are viewed by the majority of staff as challenging and varied, and that they are taking place in a dynamic and changing environment. These findings are similar to those of Figure 26 in which the challenging and varied aspects of work are the most-often cited reasons that professionals and paraprofessionals gave for liking their jobs. Such positive aspects are, however, less evident among paraprofessionals. As was the case in 2004, paraprofessionals were less likely to report that they are working in a dynamic and changing environment (45%), and perhaps as a consequence are more likely to indicate having a manageable workload (68%) and having little work-related stress (36%). A similar, but weaker, pattern is observed for recent graduates. But, perhaps the most significant observation to note from Table 59 is the increase in workload manageability for librarians at all career stages and for paraprofessionals.

**Table 59: Job Attributes Among Librarians (by Career Stage), Other Professionals, and Paraprofessionals by Survey Year**

(2014 librarian n=355, other professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

Statement	Percent Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para-professionals
Job is Challenging (2004)	<b>78</b> (84)	74 (80)	77 (85)	84 (85)	<b>75</b> (74)	<b>57</b> (59)
Job allows task variety (2004)	<b>89</b> (88)	85 (83)	88 (89)	92 (90)	<b>86</b> (74)	<b>78</b> (76)
Environment dynamic & changing (2004)	<b>71</b> (71)	57 (60)	75 (73)	73 (74)	<b>65</b> (74)	<b>45</b> (39)
Workload is Manageable (2004)	<b>45</b> (35)	57 (43)	40 (32)	46 (34)	<b>52</b> (74)	<b>68</b> (50)
Have little work-related stress <sup>2</sup>	<b>23</b> (22)	38 (32)	21 (22)	16 (19)	<b>21</b> (74)	<b>36</b> (36)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

Further illumination about how job attributes have changed are found in Tables 60 and 61 which provide responses to a series of questions posed only to mid-career and senior librarians. Beginning in Table 60, the majority of both mid-career and senior librarians continue to view their jobs as more challenging (73% and 75%, respectively) and interesting (64% and 69%, respectively) than 5 years ago. While about half of both mid-career and senior librarians from the 2014 and 2004 surveys report that they are learning more new tasks, performing more difficult tasks, and working harder than they were 5 years ago, mid-career librarians are more likely to be performing more routine tasks than they reported performing in 2004 (25% compared to 18%), as well as compared to senior librarians (25% compared to 12%).

Despite these variations between mid-career and senior librarians and between 2014 and 2004 respondents, the findings in Table 60 suggest that overall, a good portion of librarians are working as hard or even harder than they ever have and they are continuing to learn and to perform new and more difficult tasks that are challenging, interesting, and less routine.

**Table 60: Changing Job Attributes  
Among Mid-Career and Senior Librarians by Survey Year**  
(2014 n=355; 2004 n=447)

	Percent Librarians Agreeing <sup>1</sup>			
	Mid-career		Senior	
	2014	2004	2014	2004
<b>Compared to 5 years ago, I am currently required to . . .</b>				
Learn more new tasks	56	54	56	54
Perform more difficult tasks	48	56	51	50
Perform more routine task	25	18	12	23
Work harder	54	54	46	52
<b>Compared to 5 years ago, my job is currently more . . .</b>				
Challenging	73	77	75	72
Interesting	64	69	55	64
Rewarding	47	60	49	46
Enjoyable	48	57	47	52
Stressful	66	67	59	69

Source: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years."

Table 61 provides data on the same job attributes that highlight the extent that they affect job satisfaction by parsing out results for each attribute between those who indicated that they are satisfied overall with their jobs and those not satisfied. Performing more difficult tasks or working harder does not appear to have much influence on job satisfaction since roughly the same proportion of those satisfied and those not satisfied report having these elements in jobs more so than 5 years ago. Learning more new tasks and more routine tasks, however, does matter, with the former exerting a positive influence on satisfaction and the latter a negative one. For example, while 58% of satisfied librarians are learning new tasks, just 43% of not-satisfied librarians are doing the same. Of greatest influence on job satisfaction, however, is having a job that is currently more challenging (79% among those satisfied compared to 57% of those not satisfied) and especially more interesting (71% compared to 32%).

**Table 61: Changing Job Attributes  
Among Mid-Career and Senior Librarians by Job Satisfaction Level**  
(2014 n=355; 2004 n=447)

<b>Compared to 5 years ago, I am currently required to . . .</b>	<b>Percent Librarians Agreeing<sup>1</sup></b>	
	<b>Satisfied<sup>2</sup></b>	<b>Not Satisfied<sup>3</sup></b>
Learn more new tasks	58	43
Perform more difficult tasks	51	48
Perform more routine task	15	38
Work harder	50	57
<b>Compared to 5 years ago, my job is currently more . . .</b>		
Challenging	79	57
Interesting	71	32
Rewarding	54	29
Enjoyable	56	22
Stressful	60	75

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years."

<sup>2</sup>Based on responses of 1 and 2 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

<sup>3</sup>Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

## **Relationships, Respect, Recognition, and Empowerment**

The importance of healthy relationships, recognition, and participation in decision-making to CARL staff members was highlighted in Figure 24 and Table 53. As noted by Lowe and Shellenberg (2010), such relationships are not just a sign of a good work environment, but they have far-reaching implications for other aspects of work and job satisfaction:

A healthy and supportive work environment is a crucial factor in creating robust employment relationships. Individuals with strong employment relationships tend to have helpful and friendly co-workers, interesting work, assess their workplace as both healthy and safe, are supported in balancing work with their personal life, and have reasonable job demands. High levels of employee trust and commitment, in particular, are linked to perceptions that their employer cares about them (p xiii).

Tables 62 and 63 display results about the provision of strategies that are said to lend themselves to enhancing employee independence and empowerment, as well as institutional perspectives on measures such as trust, collaboration, and empowerment. Table 62 demonstrates that while self-directed groups are more prevalent than employee suggestion

programs (45% compared to 23%), both are offered in fewer libraries than they were in 2003. We have already seen in Figure 15 that libraries employ a range of strategies to help staff overcome resistance to change and that a majority (59%) of libraries also report that a lack of employee involvement is a barrier to change (Table 7). On the other hand, Table 63 suggests that most libraries are engaging in other strategies that lead to trust, cooperation, and empowerment, at least for librarians.

**Table 62: Provision of Participatory Job Strategies<sup>1</sup> to Librarians, *Other* Professionals and Support Staff by Survey Year<sup>2</sup>**

(2013 n=22; 2003 n=25)

Job Strategies	Percent Libraries			
	Librarians		<i>Other</i> Professionals	Support Staff
	2013	2003	2013	2013
Employee suggestion program	23	32	18	23
Self-directed work groups	45	64	32	14

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "yes" responses to the question: "Which of the following job strategies are provided to librarians, other professionals, or support staff?"

<sup>2</sup> In 2004, the question was asked only about librarians.

**Table 63: Library Promotion of Trust, Empowerment, and Involvement in Decision-Making by Survey Year**

(2013 n=22; 2003 n=25 )

Statement	Percent Libraries Agreeing <sup>1</sup>	
	2013	2003
The library promotes a culture of trust and cooperation between employees and employers	68	68
The library promotes collaboration and team work	86	n/a
Library involves librarians in most decisions that affect them directly	76	80
Library involves librarians in most high level decisions	50	52
Empowering librarians is important to the library	82	67

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about your library?"

Practitioner Survey findings on these aspects of work are presented in Tables 64 to 67.

With a few exceptions, the majority of respondents are in jobs where their accomplishments are recognized and they are empowered to make decisions about how to conduct their work and about their own area of the library (Table 64). The most consistent exception can be found among paraprofessionals who are the least likely to report that their accomplishments are recognized (34%) and that they are provided with opportunities to participate in decisions at

any level. Otherwise, mid-career librarians are slightly less likely than librarians at other career stages to agree that their accomplishments are recognized (47%).

**Table 64: Recognition, Autonomy, and Empowerment Among Librarians (by Career Stage), Other Professionals and Paraprofessionals by Survey Year**

(2014 librarians n=355, other professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

Statement	Percent Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para-professionals
Accomplishments are recognized	<b>52</b>	57	47	58	<b>50</b>	<b>34</b>
Provided opportunity to make decisions about how I conduct my work	<b>82</b>	73	83	89	<b>81</b>	<b>64</b>
Provided opportunity to make decisions about my area	<b>68</b>	62	67	75	<b>66</b>	<b>31</b>
(2004)	(68)	(51)	(69)	(74)	(n/a)	(35)
Provided opportunity to make decisions about overall library strategy	<b>39</b>	32	35	53	<b>35</b>	<b>11</b>
(2004)	(46)	(20)	(50)	(53)	(n/a)	(13)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

As shown in Table 65, good and respectful relationships appear to be somewhat common among CARL professional and paraprofessional staff. Having said this, all occupational groups are the least likely to report having a good relationship with administration, with mid-career librarians and paraprofessionals the least likely to do so (63%). On the other hand, staff appear to be particularly likely to have good relationships with their co-workers (between 86% and 93%), an aspect of work liked the most among many (Figure 26).

Table 66 further suggests that such positive relationships also exist among *other* professionals and paraprofessionals with librarians. Many within these two occupational groups, however, do not feel that they are treated with the same respect as librarians with the majority of paraprofessionals responding this way.

**Table 65: Good and Respectful Relationships  
Among Librarians (by Career Stage), Other Professionals and  
Paraprofessionals by Survey Year**

(2014 librarians n=355, other professional n=62, paraprofessional n=301;  
2004 librarian n=447, paraprofessional n=420)

Statement	Percent Staff Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para-professionals
Good relationship w/ supervisor (2004)	<b>78</b> (83)	86 (82)	77 (85)	76 (79)	<b>82</b> (n/a)	<b>84</b> (79)
Treated w/ respect by superiors (2004)	<b>73</b> (76)	82 (76)	69 (77)	75 (76)	<b>74</b> (n/a)	<b>72</b> (72)
Good relationship w/ administration (2004)	<b>68</b> (73)	75 (70)	63 (76)	74 (71)	<b>68</b> (n/a)	<b>63</b> (65)
Good relationships w/ co- workers	<b>90</b>	93	89	90	<b>92</b>	<b>86</b>

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

**Table 66: Good and Respectful Relationships  
Among Other Professionals and Paraprofessionals  
by Survey Year**

(2014 other professional n=62, paraprofessional n=301; 2004 paraprofessional n=420)

Statement	Percent Staff Agreeing <sup>1</sup>	
	Other Professionals	Para-professionals
Good relationship w/ librarians (2004)	<b>89</b> (n/a)	<b>77</b> (76)
Treated w/ same respect as librarians (2004)	<b>53</b> (n/a)	<b>45</b> (43)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

To conclude this section on relationships, respect, recognition, and empowerment, Table 67 provides the percentage of professionals and paraprofessionals who agree that they are

treated fairly despite their race / ethnicity, gender, or age.<sup>1</sup> While the vast majority agree with these statements, it might be argued that even 10% to 20% not agreeing is still too many. Otherwise, the findings that both recent graduates and senior librarians are the least likely to agree with the statement about age suggests that ageism can be targeted towards both the old and the young.

**Table 67: Fair Treatment Despite Race / Ethnicity, Gender, or Age  
Among Librarians, *Other* Professionals and Paraprofessionals**  
(n's provided in brackets in table)

Statement	Percent Staff Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para-professionals
<b>I am treated with respect, despite my . . .</b>						
Race or ethnicity	<b>81</b> (125)	93	77	79	<b>90</b> (21)	<b>92</b> (98)
Gender	<b>87</b> (239)	90	87	82	<b>88</b> (33)	<b>90</b> (175)
Age	<b>80</b> (252)	77	83	74	<b>86</b> (35)	<b>83</b> (195)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

<sup>1</sup> Comparisons with 2004 results are not possible due to question changes. However, the 2004 results were that 46% of librarians agreed with the statement, "In my job I am treated fairly despite my gender, race, or ethnicity."



## Key Contributors to Job Satisfaction

Having reviewed a wide range of quality of work life and job satisfaction indicators, and keeping in mind that the majority of staff are satisfied with their jobs, the results in Tables 68 and 69 help to pinpoint those factors among the many examined that most strongly influence job satisfaction for librarians and paraprofessionals, respectively.<sup>1</sup> The tables identify key determinants of job satisfaction as measured by the combination of being rated an important job element by the vast majority of respondents and by the size of the gap between satisfied and not satisfied respondents on each job indicator. The job indicator must therefore be both highly important and sufficiently different between satisfied and not satisfied respondents to be included in the tables.

For instance, as shown in Table 68, though there are other job attributes rated as more important (e.g. 94% of librarians indicate that task variety is important), having a job that is challenging is important to 91% of librarians and describes the jobs of 85% of satisfied librarians compared to the jobs of 53% of not satisfied librarians.

We can also draw conclusions about job elements that are not on the table. The absence of manageable workloads, work-life balance, and job-related stress, for example, suggest that these jobs elements, while important, insufficiently differ along the job satisfaction dimension to warrant status as a key contributor to job satisfaction. Among the 10 most important job elements listed in Table 53, furthermore, only 3 are also primary distinguishers of job satisfaction. Notably, two of these are about good and respectful relationships. Absent, however, are any extrinsic rewards such as pay and benefits.

The same cannot be said for paraprofessionals. While both librarians and paraprofessionals view pay as important (Table 53), pay is also a key contributor to job satisfaction for paraprofessionals: 75% of those satisfied report earning a fair salary compared to 45% of those who are not satisfied (Table 69). A similarly large difference exists for job security where we observe that 60% of satisfied paraprofessionals agree that they "feel certain that my job will continue" compared to just 28% of those who are not satisfied.

The results in Tables 68 and 69 can also be used to describe what "good" jobs look like for librarians and paraprofessionals. A "good" librarian job in CARL libraries (and perhaps in other academic libraries) is one that is challenging, provides opportunities to grow and learn new skills, and where relationships are healthy and respectful. A "good" paraprofessional job is one that, like librarians, provides opportunities for growth and skill development and is characterized by healthy and respectful relationships, but in addition allows work autonomy and is fairly rewarded with salaries and job security.

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<sup>1</sup> The key contributors to job satisfaction analysis is not done for *other* professionals due to an insufficient sample size that precludes the ability to compare satisfied and unsatisfied responses.

**Table 68: Most Important and Strongest Job Satisfaction Determinants  
Among Librarians by Level of Job Satisfaction**

Statement	Percent Librarians Agreeing <sup>1</sup>		
	Important (353)	Satisfied <sup>2</sup> (280)	Not Satisfied <sup>3</sup> (73)
<b>Job Attributes</b>			
My job is challenging	91	85	53
<b>Promotional and Growth Opportunities</b>			
My job allows me to grow & learn new skills	95	88	54
<b>Good and Respectful Relationship</b>			
I am treated with respect by my superiors	98	80	49
I have a good relationship with my supervisor	99	85	54

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following sets of statements about what is important to you in a job and whether the element is part of your job."

<sup>2</sup>Includes those providing responses of 1 and 2 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question "Overall, how satisfied are you with your current job?"

<sup>3</sup>Includes those providing responses of 3, 4, and 5 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question "Overall, how satisfied are you with your current job?"

**Table 69: Most Important and Strongest Job Satisfaction Determinants  
Among Paraprofessionals by Level of Job Satisfaction**

Statement	Percent Paraprofessionals Agreeing <sup>1</sup>		
	Important (257)	Satisfied <sup>2</sup> (195)	Not Satisfied <sup>3</sup> (62)
<b>Growth Opportunities</b>			
My job allows me to grow & learn new skills	93	71	29
<b>Decision-making and empowerment</b>			
My job allows me to make decisions about how I conduct my work	97	75	29
<b>Good and Respectful Relationships</b>			
I am treated with respect by my superiors	99	80	47
I have a good relationship with my supervisor	98	91	59
<b>Extrinsic Rewards</b>			
I earn a fair salary	97	75	45
I feel certain my job will continue	92	60	28

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following sets of statements about what is important to you in a job and whether the element is part of your job."

<sup>2</sup>Includes those providing responses of 1 and 2 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

<sup>3</sup>Includes those providing responses of 3, 4, and 5 on a 5-point scale with 1 meaning "very satisfied" and 5 meaning "very dissatisfied" to the question: "Overall, how satisfied are you with your current job?"

## Librarianship

We conclude this analysis of job satisfaction and quality of work life with a quick examination of responses to a few new questions added to the 8Rs Redux Practitioner Survey on librarianship and librarian identity.

A growing body of scholarship points out that librarianship is in a flux with some going so far as to maintain that it is experiencing an identity crisis. The viewpoint rests on the notion that there has been an erosion of the core competencies and ethos while at the same time a business model increasingly defines the roles of librarians as managers and as instructors to their 'clients' (Law, 2010; Shupe and Pung, 2011). It is maintained that the rejigging of traditional roles and the adding of new roles has changed the profession in such fundamental ways that the library community no longer has a clear idea of what librarians should be doing now and in the future (Law, 2010).

It is beyond the scope of this study to examine the issue of librarian identity in a way that does it full justice, however, responses from librarians about this subject are presented below in Tables 70, 71, and 72.

Beginning with the first item listed in Table 70, with less than 3 in 10 librarians agreeing, there appears to be nominal concern that librarians are losing ground in terms of their relevance to the university community; however, more than twice as many (58% of mid-career and 59% of senior librarians) feel that they are increasingly needed to articulate their relevance to the university. Greater concern than 5 years ago over the erosion of librarianship as a profession is evident among 46% of mid-career librarians and 37% of senior librarians. As further shown in Table 71, the majority of librarians at all career stages agree that their job is relevant to the university community.

Together, these results suggest that concern about librarianship, to the extent that it exists, is not rooted in a feeling of growing irrelevance to the university community. That roughly three-quarters of librarians agree that their job is grounded in the core values of librarianship also does not suggest an identity crisis, at least one that stems from de-professionalization. What is more telling, however, is the finding in Table 72 that, though relevance is important to 9 in 10 librarians, just 69% of not satisfied librarians feel that their job is relevant to the university community, and even fewer (45%) indicated that their job is grounded in the core values of librarianship. Keeping in mind once again that not satisfied librarians represent just 1 in 5, these findings indicate that at least a contingent (45% of the 20% not satisfied) are working in jobs that do not encompass professional identity values that might include confidentiality, neutrality, intellectual freedom, or a service ethos (Law, 2010). However, without having an indication of whether, or by how much, responses to these same questions have changed, we are unable to draw conclusions about any change in the perception that there has been an erosion of librarianship as a profession in CARL libraries.

On the other hand, some of the findings presented in this report point more so in the direction of an up-skilling of librarians as they grow and develop new skills (Table 50) and perform fewer

routine (Table 60) and more high tech (Table 32) and specialized tasks (Table 34) than ever before. Instead of role usurpation by interloping non-MLIS professionals that might jeopardize librarianship, the overlap in the competencies between librarians and *other* professionals appears to be evolving in a variety of ways across the CARL spectrum depending on the needs and resources of each library. Furthermore, we have not seen any evidence of role ambiguity, role overload, or a sense of disenchantment. For example, not a single one of the 360 librarians providing their views on what they disliked the most about their jobs mentioned anything about role overload, role ambiguity, or disenchantment with the adoption of a business model, or concern about de-professionalization of librarianship.

Finally, it is important to note that satisfied librarians are much more likely to indicate that their job is grounded in the core values of librarianship than librarians who are not satisfied: 81% compared to 45% (Table 72).

**Table 70: Relevance and Erosion of Librarianship  
Among Mid-Career and Senior Librarians**  
(n = 303)

<b>Compared to 5 years ago . . .</b>	<b>Percent Librarians Agreeing<sup>1</sup></b>	
	<b>Mid-Career</b>	<b>Senior</b>
Currently more concerned about my relevance to the university community	28	29
Currently find it more necessary to articulate relevance of librarians to academic community	58	59
Currently more concerned about the erosion of librarianship as a profession	46	37

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about how your job has changed in the past 5 years."

**Table 71: Relevance and Librarianship values Among Librarians by Career Stage**  
(n = 355)

Statement	Percent Librarians Agreeing <sup>1</sup>			
	Career Stage <sup>2</sup>			
	All Librarians	Recent Graduates	Mid-Career	Senior
My job is relevant to university community	86	86	87	85
My job is grounded in core values of librarianship	73	75	72	73

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about whether the element is part of your job."

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduated less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

**Table 72: Importance and Provision of Relevance and Librarianship values by Level of Job Satisfaction**

Statement	Percent Librarians Agreeing <sup>1</sup>		
	Level of Job Satisfaction		
	Important (353)	Satisfied <sup>2</sup> (280)	Not Satisfied <sup>3</sup> (73)
My job is relevant to university community	92	92	69
My job is grounded in core values of librarianship	81	81	45

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about whether the element is part of your job."

## Summary of Major Findings & Conclusions

Overall, the findings suggest that most aspects of work that are important to staff and that contribute to their job satisfaction are adequately provided. Not only are the majority of librarians, *other* professionals, and paraprofessionals satisfied (Table 52), but they are in agreement about liking the challenging, interesting, creative, varied, public service, autonomous and respectful relationship aspects of their jobs (Figure 26). It has also been found that, although staff are not as interested in promotion as they are in growth and skill development (Table 53), the opportunities for career advancement are more limited and may therefore influence interest (Table 57). Furthermore, budget restrictions appear to be a more limiting factor for promotional opportunities than they are for training to enhance skills (Table 56).

The chapter findings add to an accumulating body of evidence suggesting that professional and paraprofessional staff are rising to the challenge, or at the very least are interested in rising to the challenge of finding new, better, or more creative ways of accomplishing the same tasks or new tasks. Many practitioners wrote about this very challenge when describing the job aspects they most liked (Figure 26). By way of illustration, below is a very small sample of such sentiments expressed by librarians:

We are working in a time of transformational change and it is challenging, exciting, and rewarding to be leading the change process.

The variety of work, the international scope and ability to participate and lead the use of technologies in an academic setting.

The challenge of designing new systems and solving old problems. Always learning new technical skills and being able to apply my design talents without too much committee oversight. Knowing that my work is used by a lot of users.

Very dynamic and changing; new perspectives on the profession and practice demonstrated by new librarians who interpret their roles broadly; enjoy complexity of the changing roles of librarians (ambiguity and all!).

The diversity of activities, the range of opportunities, working in a changing field in the vanguard of new librarianship, and my awesome colleagues.

Having said this, not all types of staff are equally satisfied, nor do all jobs involve the same aspects that are important and that impact job satisfaction.

Paraprofessionals, in particular, warrant a more fulsome summary of their results. To begin, as was the case in 2004, paraprofessionals are slightly less satisfied with their jobs overall than librarians and *other* professionals (76% satisfied compared to 80% of librarians and 88% of *other* professionals; Table 52). While growth and skill development are just as important determinants of job satisfaction for paraprofessionals as they are for professionals (Table 69), they are less likely to be working in jobs with such opportunities, and they are twice as likely to report disliking the routine and repetitive aspects of their jobs that represent skill underutilization (Figure 27). Indeed, some of the job elements that are especially important to paraprofessionals are, coincidentally, the least likely to be part of their jobs. For example,

paraprofessionals are generally more concerned with their job security, yet they are the least likely to be working in a job that they are certain will continue (53% compared to 64% of librarians and 65% of *other* professionals). Alternatively, paraprofessional staff are the most likely to be working in jobs that allow them to achieve work-life balance (Table 59), and they are also the most likely to view this element of work as important. Paraprofessionals are, moreover, the most likely to indicate that they have manageable workloads (68% compared to 45% of librarians and 52% of *other* professionals; Table 59). In contrast, the more challenging and varied nature of librarian jobs appear to come with the price of lower levels of workload manageability and work-life balance. Of final note, are the lower levels of career advancement and decision-making opportunities afforded to paraprofessionals (Table 64).

In addition to being slightly more concerned about the erosion of librarianship as a profession (Table 70), mid-career librarians were found to also be slightly less satisfied with their jobs overall than they were in 2004 (from 83% down to 78%; Table 52). While a causal analysis is beyond the scope of this project, we can speculate that part of the reason for the decrease in satisfaction is due to the findings that mid-career librarians report that they are also more likely to now perform more routine work than they were 5 years ago (from 18% up to 25%; Table 60); and that compared to 2004, they are less likely to report that they are treated with respect by their superiors (from 77% down to 69%) and that they have good relationships with administration (from 76% down to 63%)(Table 65).

### **Strategic Human Resources Planning Implications**

- CARL libraries are at an important juncture in their evolution. The changing post-secondary environment of research, teaching, and scholarly communication and dissemination is triggering the development of new roles for staff, and therefore, opportunities to work and contribute in ways that many staff view as exciting, challenging, and satisfying. The challenge for CARL institutions will be to manage these changes in ways that allow staff to maintain their high rates of job satisfaction and also to ameliorate the aspects of organizational life that lead to dissatisfaction and reluctance to change. Continuous attention should be paid to employee engagement and the various indicators of job satisfaction that may influence engagement.
- Mid-career librarians are the least likely to report that their accomplishments are recognized and that their jobs are more rewarding and enjoyable compared to 5 years ago. It would be useful to consider these findings within individual organizational contexts. Many mid-career librarians should be considering senior leadership positions within CARL libraries. Given that retention rates suggest they will work within their organizations for another few decades, their engagement and participation is crucial to the continuing success of CARL libraries.

The importance of good and respectful workplace relationships is apparent and is common among all staff groups within CARL libraries. Strategies for reinforcing or growing the strength of these relationships should continue to be at the fore of all CARL workforce planning.

**APPENDIX A:**  
**INSTITUTIONAL SURVEY INSTRUMENTS**



## CARL STAFFING COMPLIMENT QUESTIONNAIRE

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### Definitions of Terms

Please ensure that you are providing a response for the appropriate staff classification according to the following definitions:

**Librarians**: The usual educational requirement is a Master's degree (or historical equivalent) from a library education program accredited by the American Library Association or its equivalent.

**Other Professionals**: Professionals not required to have an MLIS degree and are not working as a library technician or library assistant, who perform work requiring knowledge of an advanced type, customarily obtained by a prolonged course of specialized instruction leading to a professional qualification OR professionals with an advanced degree, such as a PhD, who are hired for their content/subject matter expertise.

**Support Staff**: Individuals who work in a support role and typically do not have a master's degree in library or information science or in another discipline. Support Staff also includes **Paraprofessionals** who usually possess a technical certificate or diploma from a library technician program (e.g. IT support, library technicians), but they might also work in paraprofessional roles with an undergraduate degree and/or relevant experience (e.g. library assistants).

**Job Classification Scheme**: There are 6 general categories of jobs for which you are asked to provide information about on the chart at the beginning of the survey. Not all of the following classifications may be applicable to your library. In recognizing that some library positions may include more than one classification, we ask that you report in the classification that is closest to the primary focus of the position.

1. Public Services (including reference, circulation / reserve, instruction, liaison, learning commons, and support activities)
2. Technical Services (including cataloguing / metadata, acquisitions, and support activities)
3. Collections (including acquisitions, management and preservation of collections in all formats, including special collections)
4. Information Technology (IT) (including digital and web services)
5. Management (responsible for budgets and personnel, overseeing operations, and instituting policies and accountability measures)
6. Other Staff (complete only if you have staff who do not fit into any of the five categories provided above)

**Visible Minorities** are employees who are non-Caucasian in race or non-white in colour (e.g. Black, Asian, Middle Eastern, Hispanic).

**Aboriginal Canadians** includes Status Indian, Non-Status Indian, Métis or Inuit.

**Disabled** includes employees who have a long term or recurring physical, mental, sensory, psychiatric or learning impairment (e.g., loss of hearing or sight, reduced mobility, learning disability) and who are considered disadvantaged in employment by reason of that disability.

**PLEASE COMPLETE THE FOLLOWING BY REPORTING ALL NUMBERS IN FTE AS OF JULY 1, 2013 AND BY DRAWING UPON THE DEFINITIONS PROVIDED ABOVE.**

- 1. Total # of all employees** \_\_\_\_\_  
(Including permanent, temporary, contract, and part-time employees)

	<b>Librarians</b>	<b>Other Professionals</b>	<b>Support Staff</b> (Not including Casual workers)
<b>2. Total #</b>			
<b>3. Job Classification</b>			
# Public Services			
# Technical Services			
# Information Technology (IT)			
# Collections			
# Management			
# Other Positions			
<b>4. Demographics</b>			
# Female			
# Visible Minority			
# Aboriginal			
# Disabled			
# Covered by Collective Agreement			
<b>5. Current Age of Staff (as of January 1, 2013)</b>			
# < 45 years of age			
# 45 to 55 years of age			
# 56 to 60 years of age			
# > 60 years of age			

- 6. Total # of Paraprofessional Staff:** \_\_\_\_\_  
(Paraprofessionals usually possess a technical certificate and/or diploma from an accredited library technician program (e.g. library technicians), but they might also work in paraprofessional roles with an undergraduate degree and/or relevant experience (e.g. library assistants).)

	Librarians	Other Professionals	Support Staff (Not including Casual workers)
<b>7. Retirements in Past 10 Years (from 2003 to 2013)</b>			
Total # retirements			
# retirements before the age of 60			
# retirements between the ages of 61 and 64			
# retirements at age of 65			
# retirements after 65 years of age			
# retired positions not replaced			
# retired positions filled internally			
# retired positions filled externally			
<b>8. Hiring in Past 5 years (from 2008 to 2013)</b>			
Total # New hires			
# New hires into newly created positions			
# New hires into positions substantially changed in focus for the purposes of recruitment			

**9. Please provide the following details about your *Other Professional* staff.**

# Archivists	
# Museum professionals	
# of Subject / Content Experts with PhD	
# Information Technology professionals	
# Statistical / Data Analysts	
# Human Resource professionals	
# Business / Finance professionals	
# Facilities professionals	
# Communications professionals	
# Development (fundraising) professionals	
# Publishing professionals	
# Copyright specialists	
# General Staff Supervisors	
# Student Success professionals	

**10. Please provide new librarian positions (to a maximum of 3) established in your library in the past 5 years.**

☐ No new librarian positions established in the past 5 years

**11. Please provide new other professional positions (to a maximum of 3) established in your library in the past 5 years.**

☐ No new other professional positions established in the past 5 years

## CARL INSTITUTIONAL WEB SURVEY

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### **SECTION A: RETENTION**

1. Compared to five years ago, are turnover rates (other than from retirements) lower, higher, or about the same among professional librarians?
  1. Much lower
  2. Lower
  3. About the same
  4. Higher
  5. Much higher
2. Are turnover rates a concern for your library?  
☐ Yes  
☐ No  
2.a Why or why not are they a concern? \_\_\_\_\_

### **SECTION B: RETIREMENTS AND SUCCESSION PLANNING**

1. Does your organization offer pre- or post-retirement options?  
☐ Yes, pre-retirement options only  
☐ Yes, post-retirements options only  
☐ Yes, both pre- and post-retirement options  
☐ No, neither pre- or post-retirement options
2. Has your organization offered librarians an early retirement package in the past 5 years?  
☐ Yes  
☐ No
3. Has your organization offered librarians a severance package in the past 5 years?  
☐ Yes  
☐ No
4. Over the past 5 years, how adequate was your pool of internal candidates in replacing the following characteristics of your departing senior librarians?

	Not at all				
Very					
	Adequate				
<u>Adequate</u>					
a. General skills and knowledge	1	2	3	4	5
b. Managerial skills	1	2	3	4	5
c. Leadership abilities	1	2	3	4	5
5. Other than the above, are there any other skills, abilities, or talents you experience difficulty replacing when senior professional librarians leave your library?					

- |    |  | Not at All |   |   | To a Great Extent |   |
|----|--|------------|---|---|-------------------|---|
| a. | Inadequate pool of qualified candidates  | 1          | 2 | 3 | 4                 | 5 |
| b. | Inadequate pool of interested candidates   | 1          | 2 | 3 | 4                 | 5 |
| c. | Inadequate leadership training provided by MLIS programs                                     | 1          | 2 | 3 | 4                 | 5 |
| d. | Inadequate management training provided by MLIS programs                                     | 1          | 2 | 3 | 4                 | 5 |
| e. | Inadequate <b>post MLIS</b> management training  | 1          | 2 | 3 | 4                 | 5 |
| f. | Inadequate <b>post MLIS</b> leadership development   | 1          | 2 | 3 | 4                 | 5 |
| g. | Budget restraints  | 1          | 2 | 3 | 4                 | 5 |
| h. | Organizational hiring freeze or limited hiring policy  | 1          | 2 | 3 | 4                 | 5 |
| i. | Geographical location  | 1          | 2 | 3 | 4                 | 5 |
| j. | Inability to fast track strong candidates  | 1          | 2 | 3 | 4                 | 5 |
| k. | Absence of succession planning strategy  | 1          | 2 | 3 | 4                 | 5 |
| l. | Elimination of middle-level positions that serve as training ground for upper-level postings | 1          | 2 | 3 | 4                 | 5 |
| m. | The need for bilingual staff   | 1          | 2 | 3 | 4                 | 5 |

- Succession Planning is a proactive effort that makes provision for the development and replacement of librarians over a period of time and ensures leadership continuity.***

- ☐ Yes
- ☐ No (skip to Q11)

- |            |   |   |   |          |
|------------|---|---|---|----------|
| 1          | 2 | 3 | 4 | 5        |
| Not at all |   |   |   | Very     |
| adequate   |   |   |   | adequate |

- ☐ Yes
- ☐ No

- |   | Yes | No |
|---|-----|----|
| a. A Strategic plan that informs your future human resource needs                                     | 1   | 2  |
| b. Identification of the key areas in your library that require development                           | 1   | 2  |
| c. Identification of the desirable characteristics of managers and leaders in your library            | 1   | 2  |
| d. Identification of key people you want to groom and develop for future managers and leaders         | 1   | 2  |
| e. Development of customized careers paths for librarians based on their unique talents and abilities | 1   | 2  |
| f. Development of opportunities for librarians to keep them challenged and Involved                   | 1   | 2  |

- |  |   |   |
|--|---|---|
| g. Provision of training to prepare librarians for more responsible positions                            | 1 | 2 |
| h. Provision of mentoring to prepare librarians for more responsible positions                           | 1 | 2 |
| i. Regular review of adequacy of current librarians in meeting your library's human resource needs       | 1 | 2 |
| j. A process for transferring the knowledge held by departing senior librarians to mid-level librarians. | 1 | 2 |

### **SECTION C: PROMOTIONAL OPPORTUNITIES**

1. On a scale of 1 to 5, how would you rate the promotional opportunities for librarians compared to five years ago?

1	2	3	4	5
Much worse		About the same		Much better

2. On a scale of 1 to 5, how would you rate the current promotional opportunities for librarians?

1	2	3	4	5
Poor				Excellent

3. On a scale of 1 to 5, to what extent do the following items contribute to a lack of promotional opportunities for librarians in your organization?

	<b>Not at</b>	<b>To a</b>
<b>Great</b>		
	<b>All</b>	
<b>Extent</b>		

a. Delaying/flattening of organizational structure	1	2	3	4	5
b. Budgetary restrictions	1	2	3	4	5
c. Organizational hiring freeze or limited hiring policy	1	2	3	4	5
d. Limited librarian turnover	1	2	3	4	5

### **SECTION D: RECRUITMENT**

1. On a scale of 1 to 5, how would you rate the general qualifications of applicants for librarian positions compared to 5 years ago?

1	2	3	4	5
Much less qualified		About the same		Much more qualified

2. On a scale of 1 to 5, how would you rate your organization's ability to recruit qualified librarians compared to five years ago?

1	2	3	4	5
Much easier		About the same		Much more difficult

3. On a scale of 1 to 5, how would you rate your current ability to recruit qualified librarians?

1	2	3	4	5
Poor				Excellent

4. On a scale of 1 to 5, to what extent do the following issues prevent you from hiring qualified librarians?

	<b>Great</b>	<b>Not at</b>		<b>To a</b>	
		<b>All</b>			
<b>Extent</b>					
a. Inadequate pool of qualified candidates	1	2	3	4	5
b. Inadequate pool of interested candidates	1	2	3	4	5
c. Budget restraints	1	2	3	4	5
d. Organizational hiring freeze or limited hiring policy	1	2	3	4	5
e. Competition from other sectors for librarians (excluding U.S.)	1	2	3	4	5
f. The need to hire bilingual staff	1	2	3	4	5
g. Other: Please specify					
	1	2	3	4	5



5. For the following list, first rate how important the competency is when you are making recruiting decisions about librarians and second, the level of ease or difficulty you have experienced in trying to fulfill these competencies.

	<i>Importance of Competency</i>					<i>Ability to Fulfill Competency</i>				
	<b>Difficult</b>		<b>Not at all</b>			<b>Very Easy</b>		<b>Very</b>		
			<b>Important</b>			<b>to Fulfill</b>		<b>to Fulfill</b>		
a. MLIS degree			1	2	3	4	5			
b. Other non-MLIS education			1	2	3	4	5			
c. Number of years of experience			1	2	3	4	5			
d. Generalist skills (i.e. can work in a number of different areas)			1	2	3	4	5			
e. Specialist skills*			1	2	3	4	5			
f. Interpersonal or 'people' skills			1	2	3	4	5			
g. Communication skills			1	2	3	4	5			
h. Entrepreneurial skills			1	2	3	4	5			
i. Technology skills			1	2	3	4	5			
j. Research skills			1	2	3	4	5			
k. Teaching skills			1	2	3	4	5			
l. Managerial skills			1	2	3	4	5			
m. Business skills			1	2	3	4	5			
n. Problem solving skills			1	2	3	4	5			
o. Leadership potential			1	2	3	4	5			
p. Ability to handle high volume workload			1	2	3	4	5			
q. Ability to flexibly adapt to change			1	2	3	4	5			
r. Ability to deal with a range of users			1	2	3	4	5			
s. Ability to learn new skills			1	2	3	4	5			
t. Commitment to organizational goals			1	2	3	4	5			
u. Ability to advocate for the library			1	2	3	4	5			
v. Reliable			1	2	3	4	5			
w. Logical			1	2	3	4	5			
x. Innovative			1	2	3	4	5			
y. Interest in professional development/ continuing education			1	2	3	4	5			

6. In the past 5 years, how have the characteristics you are looking for when recruiting librarians changed, if at all?
7. To what extent do you think the education provided in MLIS programs equips graduates with the competencies required to be librarians at your library?

1                      2                      3                      4                      5  
**To No**                                                                                                          **To a Great**  
**Extent**                                                                                                          **Extent**

8. How could the curriculum content of MLIS programs be improved, if at all? (e.g. what should the content focus more on or less on?)
9. Do you require MLIS degrees from an ALA-accredited (or equivalent) program as a qualification in hiring librarians?  
☐ Yes  
☐ No
10. What are the circumstances, if any, under which you might not require an MLIS degree from an ALA-accredited (or equivalent) program as a qualification when hiring librarians?
11. Does your organization have a policy requiring you to hire Canadian librarian applicants first?  
☐ Yes  
☐ No
12. Does your organization have a hiring policy designed to encourage the recruitment of librarians from diverse ethnic and racial backgrounds?  
☐ Yes  
☐ No
13. Please indicate to what extent you think each of the following items explain why visible minorities might not be represented as librarians in Canadian libraries?

	<b>To No</b>			<b>To a Great</b>	
	<b>Extent</b>			<b>Extent</b>	
a. An insufficient number of visible minority applicants	1	2	3	4	5
b. An insufficient number of qualified (ALA-accredited degree or Equivalent) visible minority applicants	1	2	3	4	5
c. An insufficient number of visible minorities in LIS programs	1	2	3	4	5
d. Complexity of process in ascertaining foreign LIS education	1	2	3	4	5
e. Racial discrimination	1	2	3	4	5
f. Other explanation:	1	2	3	4	5

Staff: Please specify \_\_\_\_\_

## **SECTION E: TRAINING AND DEVELOPMENT**

1. On a scale of 1 to 5, how would you rate your organization's ability to provide librarians with opportunities to experience leadership roles?

1                      2                      3                      4                      5  
 Poor                                                                                                          Excellent

2. During the past year did your library provide any of the following training formats or types of job-related training to librarians, other professionals, and support staff? Please check all that apply.

	Provided to Librarians	Provided to <i>Other</i> Professionals	Provided to Support Staff
<b>Training Formats:</b>			
a. Internal classroom training	1	2	3
b. Internal on-the-job training	1	2	3
c. External private training/consultancy	1	2	3
d. Training provided by library associations	1	2	3

<b>Types of Training:</b>			
a. Job-oriented skills training (excluding technology)	1	2	3
b. Technology skills training	1	2	3
c. Customer-service related training	1	2	3
d. Research methods training	1	2	3
e. Management training	1	2	3
f. Business skills training	1	2	3
g. Leadership development	1	2	3

3. Does your organization subsidize, assist, or reimburse librarians, *other* professionals or support staff for attendance at library association meetings? Please check all that apply.

- ☐ Librarians  
☐ Other professionals  
☐ Support Staff

4. On a scale of 1 to 5, to what extent do the following groups of staff require ongoing training to meet the needs of your organization?

	No Training		Some Training		A Great Amount of Training
a. All librarians	1	2	3	4	5
b. Public services librarians	1	2	3	4	5
c. Technical services librarians	1	2	3	4	5
d. IT librarians	1	2	3	4	5
e. Collections librarians	1	2	3	4	5
f. Management librarians	1	2	3	4	5
g. Other librarians	1	2	3	4	5
h. <i>Other</i> professionals	1	2	3	4	5
i. Support staff	1	2	3	4	5

5. Do you have a routine method for determining the training needs among librarians?

1. No  
2. Yes: Please specify the method:

6. Do you have a routine method for evaluating the effectiveness of training provided to librarians (e.g. extent to which knowledge transferred from training to workplace)?

1. No  
2. Yes: Please specify the method:

## SECTION F: HUMAN RESOURCE POLICIES AND STRATEGIES

1. On a scale of 1 to 5, how would you rate the competitiveness of your librarian salaries?

1                      2                      3                      4                      5  
 Not at all                      Very  
 competitive                      competitive

2. Which of the following benefits are at least partially funded by your organization for librarians, other professionals, for paraprofessionals?

	Provided to Librarians	Provided to Other Professionals	Provided to Support Staff
a. Childcare services	1	2	3
b. Childcare subsidies/reimbursements	1	2	3
c. Elder care leaves	1	2	3
d. Educational leaves	1	2	3
e. Sabbaticals	1	N/A	N/A
f. Research leaves	1	N/A	N/A
g. Tenure	1	N/A	N/A

3. Which of the following job strategies are provided to librarians, other professionals, and support staff?

	Provided to Librarians	Provided to Other Professionals	Provided to Support Staff
a. Employee's suggestion program	1	2	3
b. Job rotation	1	2	3
c. Job enrichment	1	2	3
d. Job sharing	1	2	3
e. Job mentoring	1	2	3
f. Problem-solving teams	1	2	3
g. Self-directed work groups	1	2	3
h. Performance evaluations	1	2	3
i. Flextime	1	2	3
j. Compressed work weeks	1	2	3
k. Fixed shifts	1	2	3
l. Rotating shifts	1	2	3

4. On a scale of 1 to 5, to what extent do you agree with the following statements about your library?

	Strongly Disagree			Strongly Agree	
a. The library promotes a culture of lifelong learning	1	2	3	4	5
b. The library promotes a culture of trust and cooperation between employees and employers	1	2	3	4	5
c. The library promotes collaboration and team work					
d. The library practices family-friendly procedures	1	2	3	4	5
e. The library involves librarians in most decisions that affect them directly	1	2	3	4	5
f. The library involves librarians in most					

high-level decisions	1	2	3	4	5
g. Empowering librarians is important to the library	1	2	3	4	5
h. Most <u>new</u> librarians are highly motivated	1	2	3	4	5
i. Most <u>mid-level</u> librarians are highly motivated	1	2	3	4	5
j. Most <u>senior</u> librarians are highly motivated	1	2	3	4	5
k. The professional librarian role is increasingly becoming blurred with the role of support staff	1	2	3	4	5
l. The professional librarian role is increasingly becoming blurred with the role of <i>other</i> professional staff.	1	2	3	4	5

## **SECTION G: CHANGING STAFF ROLES AND ORGANIZATIONAL RESTRUCTURING**

1. On a scale of 1 to 5, to what extent have the following changes in the staffing needs of your library occurred in the past 5 years?

In the past five years . . .	Not at All			To a Great Extent	
a. The need for more <u>librarians</u> has increased	1	2	3	4	5
b. The need for more <u>paraprofessionals</u> has increased	1	2	3	4	5
c. The need for paraprofessionals to perform tasks once done by Professional librarians has increased	1	2	3	4	5
d. The need for more <u>other professionals</u> has increased	1	2	3	4	5
e. The need for <u>librarians</u> to perform managerial functions has increased	1	2	3	4	5
f. The need for librarians to perform business functions has increased	1	2	3	4	5
g. The need for <u>librarians</u> to assume leadership roles has increased	1	2	3	4	5
h. The need for <u>librarians</u> to perform a wider variety of tasks has increased	1	2	3	4	5
i. The need for <u>librarians</u> to flexibly adapt to change has increased	1	2	3	4	5
j. The need for <u>librarians</u> to perform more specialized functions has increased	1	2	3	4	5

- 1.a What is the main reason why your library's need for other professionals has increased?

- 1.b Please provide the most common specialized functions that librarians are now needed to perform more often compared to 5 years ago (if applicable)

2. To what extent do the following explain why librarian roles have changed in the past 5 years?

	Not at All			To a Great Extent	
a. Introduction of new technology	1	2	3	4	5
b. Introduction of new services	1	2	3	4	5
c. Elimination of services	1	2	3	4	5
d. Organizational restructuring	1	2	3	4	5
e. Librarian retirements	1	2	3	4	5
f. Budget Cuts	1	2	3	4	5

3. On a scale of 1 to 5, to what extent do each of the following serve as an obstacle to making changes in your library?

	Not at All			To a Great Extent	
a. Hierarchical organizational structure	1	2	3	4	5
b. Budget	1	2	3	4	5

c. Collective agreements	1	2	3	4	5
d. Lack of employee involvement	1	2	3	4	5
e. Organizational culture	1	2	3	4	5
f. Employee resistance to change	1	2	3	4	5

4. Are there any other sources of impediments to change in your library? Please specify

5. What, if anything, is your library doing to try to encourage staff to flexibly adapt to change?

6. In thinking about the future needs of your library, and using the same scale of 1 to 5, to what extent do you think the following changes in needs will occur at your library over the next 5 years?

Over the next 5 years . . .	Not at All			To a Great Extent	
a. The need for more <u>librarians</u> will increase	1	2	3	4	5
b. The need for more <u>paraprofessionals</u> will increase	1	2	3	4	5
c. The need for more <u>other professionals</u> will increase	1	2	3	4	5
d. The need for <u>librarians</u> to perform managerial functions will increase	1	2	3	4	5
e. The need for librarians to perform business functions will increase	1	2	3	4	5
f. The need for <u>librarians</u> to assume leadership roles will increase	1	2	3	4	5
g. The need for <u>librarians</u> to perform a wider variety of tasks will increase	1	2	3	4	5
h. The need for <u>librarians</u> to flexibly adapt to change will increase	1	2	3	4	5
i. The need for <u>librarians</u> to perform more specialized functions will increase	1	2	3	4	5
j. The need for <u>paraprofessionals</u> to perform tasks once done by <u>librarians</u> will increase	1	2	3	4	5

7. Has your organization experienced any of the following organizational changes in the past 5 years?

In the past 5 years, our organization has experienced . . .	Yes	No
a. Greater integration among different functional areas	1	2
b. An increase in the degree of centralization	1	2
c. Downsizing (a reduction in the number of employees to reduce expenses)	1	2
d. Re-engineering (redesigning processes to improve performance and cost)	1	2
e. A reduction in the number of managerial levels (i.e. delayering)	1	2
g. Greater reliance on part-time workers	1	2
h. Greater reliance on temporary workers	1	2
j. Greater reliance on outsourcing	1	2

## SECTION H: CONCLUDING QUESTIONS

- What, in your opinion, are the most pressing human resource challenges facing the academic library sector over the next 5 years and why?
- In what region is your library located?
  - ☐ Western Canada (BC, AB, SK, MB)
  - ☐ Ontario (ON)
  - ☐ Quebec (QC)
  - ☐ Atlantic Canada (NB, NL, NS)

**APPENDIX B:**  
**PRACTITIONER SURVEY INSTRUMENT**

## CARL PRACTITIONER SURVEY

1. Do you have a Masters degree in Library and Information Studies (*or its historical equivalent—e.g. Bachelor of Library Science*)?
- ☐ Yes
- ☐ No

### SECTION A: LIBRARIAN BACKGROUND QUESTIONS

2. Where did you receive your Master's degree in Library and Information Studies (*or its historical equivalent*)?
- ☐ From an ALA-accredited Canadian library school
- ☐ From an ALA-accredited American library school
- ☐ From the historical equivalent to an ALA-accredited library school (e.g. Bachelor of Library Science)
- ☐ From a library school outside North America
- ☐ Other: Please specify \_\_\_\_\_
- 2a. Please specify the country where you received your Master's degree:
- \_\_\_\_\_
- 2b. Does your current employer recognize your Master's degree in Library and Information Studies in terms of your position?
- ☐ Yes
- ☐ No
- ☐ Don't know
- 2c. Have you taken any courses of study or programs in Canada to supplement your library degree?
- ☐ No
- ☐ Yes
- 2d. Please provide the name of the course or program.
- 2e. How, if at all, has this made a difference to how your employer and the library community recognize your credentials?
3. Do you have any of the following other degrees (*Check all that apply*)?
- ☐ Certificate/diploma from a library technician program
- ☐ Education degree
- ☐ Other Master's degree (*not including MLIS/MLS*)
- ☐ Ph.D.
4. Thinking back to when you first decided you wanted to be a librarian, what were your two main reasons for choosing the librarian profession?
- First Reason: \_\_\_\_\_
- Second Reason: \_\_\_\_\_



5. To what extent do you agree/disagree with the following sets of statements about what is important to you in a job and whether that element is part of your library job?

	Strongly Disagree			Strongly Agree		
a. It is important to me to have a job that is grounded in the core values of librarianship	1	2	3	4	5	
b. My job is grounded in the core values of librarianship	1	2	3	4	5	
a. It is important to me to have a job that is relevant to the university community	1	2	3	4	5	
b. My job is relevant to the university community	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to teach	1	2	3	4	5	
b. <u>In my job I</u> am allowed me to teach	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am eligible for tenure.	1	2	3	4	5	
b. <u>In my job I</u> am eligible for tenure	1	2	3	4	5	
a. <u>It is important to me have a job</u> in which I am eligible for a continuing appointment	1	2	3	4	5	
b. <u>In my job I</u> am eligible for a continuing appointment	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am eligible for research leaves (e.g., sabbaticals)	1	2	3	4	5	
b. <u>In my job I</u> am eligible for research leaves	1	2	3	4	5	
a. <u>It is important to me have a job</u> that allows me to conduct research	1	2	3	4	5	
b. <u>In my job I</u> conduct research	1	2	3	4	5	
a. <u>It is important to me have a job</u> that allows me to publish research	1	2	3	4	5	
b. <u>In my job I</u> publish research	1	2	3	4	5	

6. On a scale of 1 to 5, with 1 meaning 'to no extent' and 5 meaning 'to a great extent,' to what extent do the following prevent you from conducting research?

	To no Extent		To some Extent		To a great Extent	
a. Lack of time	1	2	3	4	5	
b. Lack of recognition for conducting research	1	2	3	4	5	
c. Lack of research skills	1	2	3	4	5	
d. Lack of confidence in conducting research	1	2	3	4	5	
e. Lack of mentorship support	1	2	3	4	5	
f. Lack of financial support	1	2	3	4	5	
g. Lack of interest	1	2	3	4	5	

7. Are there any other reasons why you are prevented from conducting research? \_\_\_\_\_

8. When did you receive your Master's degree in Library and Information Studies (*or its historical equivalent*)?

- ☐ Before 1970  
☐ Between 1970 and 1979  
☐ Between 1980 and 1989

- ☐ Between 1990 and 1999  
☐ Between 2000 and 2008  
☐ After 2008

## SECTION B: RECENT MLIS GRADUATES:

1. To what extent do you agree or disagree with the following statements about the education you received in your Master's of Library and Information Studies program?

	Strongly Disagree			Strongly Agree			N/A
a. The program provided me with the <b>information technology skills</b> required to effectively perform my current job.	1	2	3	4	5	8	
b. The program provided me with the <b>management skills</b> required to effectively perform my current job.	1	2	3	4	5	8	
c. The program provided me with the <b>leadership skills</b> required to effectively perform my current job. <i>Leadership skills generally include negotiating, networking and motivating and having a future visions and strong community involvement</i>	1	2	3	4	5	8	
d. The program provided me with the <b>business skills</b> required to effectively perform my current job. <i>Business skills generally include the ability to read a financial statement, prepare a business case, or develop a prospectus for fund-raising or a marketing plan, for example.</i>	1	2	3	4	5	8	
e. The program provided me with the <b>problem-solving skills</b> required to effectively perform my current job.	1	2	3	4	5	8	
f. The program provided me with the <b>research skills</b> required to effectively perform my current job.	1	2	3	4	5	8	
g. The program provided me with the <b>general skills and abilities</b> required to effectively perform my current job.	1	2	3	4	5		
h. The program provided me with a realistic depiction about <b>what it is like to work as an academic librarian.</b>	1	2	3	4	5		
i. I <b>can apply what I learned</b> in the program to what I do in my librarian job	1	2	3	4	5		

2. Overall, how satisfied are you with the quality of education you received in your MLIS program?

- ☐ Very dissatisfied  
☐ Dissatisfied  
☐  
☐ Satisfied  
☐ Very satisfied

3. What, if anything, could be done to improve the quality of education offered in MLIS programs?

4. Did you participate in a co-op or practicum (or other type of program that involved periods of work) while still enrolled in your library studies program?

- ☐ Yes  
☐ No  
☐ Don't know

5. After completing your library studies program, how long did it take you to find your first professional librarian position?
- ☐ I already had a job lined up before graduating
  - ☐ 0 to 2 months after graduating
  - ☐ 3 to 6 months after graduating
  - ☐ 7 to 12 months after graduating
  - ☐ More than one year after graduating
6. Was your first professional librarian position the one you have now?
- ☐ Yes
  - ☐ No
- 6a. Was your first professional librarian position full-time or part-time?
- ☐ Full-time (*typically, more than 29 hours per week*)
  - ☐ Part-time (*typically less than 30 hours per week*)
- 6b. Was your first professional librarian position permanent or temporary?
- ☐ Permanent (*permanent means there is no indication of when the job will end*)
  - ☐ Temporary (*temporary means the job will terminate at some specified time*)
7. Did you have any experience working in a library before participating in your library studies program?
- ☐ Yes
  - ☐ No
8. What kind of work do you see yourself performing in the next 5 to 10 years?
- ☐ The same work I am doing now
  - ☐ Senior Administrator (e.g. head / chief librarian, director, or deputy / assistant head, chief, director)
  - ☐ Middle management librarian (e.g. department or branch head)
  - ☐ Supervisory librarian
  - ☐ Non-management librarian
  - ☐ Non-librarian work
  - ☐ Don't know
  - ☐ Other: Please specify:
- 

## SECTION B: MID-CAREER AND SENIOR LIBRARIANS

1. To what extent do you agree or disagree with the following statements about **how your job has changed in the past 5 years**:

	Strongly Disagree			Strongly Agree		
a. My job is currently more interesting	1	2	3	4	5	
b. My job is currently more challenging	1	2	3	4	5	
c. My job is currently more enjoyable	1	2	3	4	5	
d. My job is currently more rewarding	1	2	3	4	5	
e. My job is currently more stressful	1	2	3	4	5	
f. My job is currently more grounded in the core values of librarianship	1	2	3	4	5	
g. My job currently requires more skill	1	2	3	4	5	
h. I am currently more concerned about my job security	1	2	3	4	5	

i.	I am currently more concerned about my relevance to the university community	1	2	3	4	5
j.	I am currently more concerned about the blurring of my professional role with the role of support staff	1	2	3	4	5
k.	I am currently more concerned about the blurring of my professional role with the role of other professions	1	2	3	4	5
l.	I am currently more concerned about the erosion of librarianship as a profession	1	2	3	4	5
m.	I am currently required to learn more new tasks	1	2	3	4	5
n.	I am currently required to perform more difficult tasks	1	2	3	4	5
o.	I am currently required to perform more high tech tasks	1	2	3	4	5
p.	I am currently required to perform a wider variety of tasks	1	2	3	4	5
q.	I am currently required to perform more routine tasks	1	2	3	4	5
r.	I am currently required to work harder	1	2	3	4	5
s.	I am currently required to perform more managerial functions	1	2	3	4	5

*Leadership involves taking initiative and making things happen through the effective action of others. Skills important for leadership include negotiating, networking, and motivating, and having a future vision and strong community involvement.*

t.	I am currently required to assume more of a leadership role	1	2	3	4	5
----	---	---	---	---	---	---

*Business functions generally include such skills as the ability to understand or generate a financial statement, budget, business case, service evaluation or a fund-raising, marketing, communications, or facilities plan.*

u.	I am currently required to perform more business functions	1	2	3	4	5
v.	I am currently required to conduct more research	1	2	3	4	5
w.	I am currently required to perform more tasks once done by paraprofessional staff	1	2	3	4	5
x.	I am currently required to perform more tasks once done by other professional staff	1	2	3	4	5
y.	I am currently less motivated to do my work	1	2	3	4	5
z.	It is currently more necessary to articulate the relevance of librarians to the academic community	1	2	3	4	5

2. What kind of work do you see yourself performing in your final working years?

- ☐ The same work I am doing now
- ☐ Senior Administrator (e.g. head librarian, director, or deputy / assistant head, chief, director)
- ☐ Middle management librarian (e.g. department or branch head)
- ☐ Supervisory librarian
- ☐ Non-management librarian
- ☐ Non-librarian work
- ☐ Don't know
- ☐ Other: Please specify:

---

3. How many more years do you realistically expect to work as a librarian before you retire?
- ☐ Less than 3 years
  - ☐ 3 to 5 years
  - ☐ 6 to 8 years
  - ☐ 9 to 10 years
  - ☐ 11 to 15 years
  - ☐ More than 15 years
4. Would you accept an early retirement package if it were offered?
- ☐ Yes
  - ☐ No
  - ☐ Don't know
- 4a. Please explain why you would accept an early retirement package:
- 4b. Please explain why you would not accept an early retirement package:
5. Are there any conditions that would make you consider delaying your retirement?
- ☐ Yes
  - ☐ No
  - ☐ Don't know
- 5a. Please specify what conditions would make you consider delaying your retirement:
6. Are you interested in a graduated retirement where you gradually reduce your workload during your final years of work?
- ☐ Yes
  - ☐ No
  - ☐ Don't Know
7. To what extent are you looking forward to retiring from your job as a professional librarian?
- |        |   |   |   |            |
|--------|---|---|---|------------|
| 1      | 2 | 3 | 4 | 5          |
| To No  |   |   |   | To a Great |
| Extent |   |   |   | Extent     |

## SECTION B: NON-LIBRARIANS

1. What is your highest level of education?
- ☐ High school diploma
  - ☐ Post Secondary Diploma/Certificate
  - ☐ Education degree
  - ☐ University undergraduate degree (*not including education degree*)
  - ☐ Master's degree
  - ☐ Ph.D.
2. Do you have a certificate/diploma from a library technician program?
- ☐ Yes
  - ☐ No
- 2a. In what year did you receive your library technician certificate/diploma? \_\_\_\_\_

3. Are you interested in obtaining an MLIS degree?

- ☐ Yes  
☐ No

3a. Please explain why you are not interested in obtaining an MLIS degree \_\_\_\_\_

3a. What, if anything, has prevented you from obtaining an MLIS degree to date?

4. To what extent do you agree/disagree with the following sets of statements about a) What is important to you in a job and b) Whether that element is part of your current library job?

	Strongly Disagree			Strongly Agree	
a. <u>It is important to me to have a job</u> in which I have a good relationship with librarian staff	1	2	3	4	5
b. <u>In my job I</u> have a good relationship with librarian staff	1	2	3	4	5
a. <u>It is important to me to have a job</u> in which I am treated with the same amount of respect as librarians	1	2	3	4	5
b. <u>In my job I</u> am treated with the same amount of respect as librarians	1	2	3	4	5

## SECTION C: JOB CHARACTERISTICS (ALL)

1. What level is your current position?
  - ☐ Non-Management
  - ☐ Supervisor
  - ☐ Middle Management (e.g., branch head, department head)
  - ☐ Senior Administrator (e.g. head / chief librarian, director, **or** deputy/assistant head, chief, director)
2. Which one of the following job titles best describes your current library position?
  - ☐ Librarian
  - ☐ Library Technician
  - ☐ Library Assistant or Associate
  - ☐ Subject / Content Expert with PhD
  - ☐ Archivist
  - ☐ Museum Professional
  - ☐ Other Professional
  - ☐ Other: Please specify: \_\_\_\_\_
- 2a. Please indicate which of the following BEST describes your job.

<input type="checkbox"/> Information Technology professional	<input type="checkbox"/> Media Specialist
<input type="checkbox"/> Statistical/Data Analyst	<input type="checkbox"/> Assessment professional
<input type="checkbox"/> Student Success professional	<input type="checkbox"/> Development (fundraising) professional
<input type="checkbox"/> Human Resource professional	<input type="checkbox"/> Publishing professional
<input type="checkbox"/> Business/Finance professional	<input type="checkbox"/> Copyright specialist
<input type="checkbox"/> Facilities professional	<input type="checkbox"/> General Staff Supervisor
<input type="checkbox"/> Communications / Marketing professional	<input type="checkbox"/> Other Please specify: _____
3. How many years have you worked in this library position? \_\_\_\_\_
4. How many years have you worked at your current university library? \_\_\_\_\_
5. Which of the following best describes the primary area of your job?
  - ☐ Public Services (including reference, circulation / reserve, instruction, liaison, learning commons, and support activities)
  - ☐ Technical Services (including cataloguing / metadata, acquisitions, and support activities)
  - ☐ Collections (including acquisitions, management and preservation of collections in all formats, including special collections)
  - ☐ Information Technology (IT) (including digital and web services)
  - ☐ Management (responsible for budgets and personnel, overseeing operations, instituting policies and accountability measures)
  - ☐ Other: Please Specify \_\_\_\_\_
6. How many hours do you usually work per week? \_\_\_\_\_
7. Is your position permanent or temporary?
  - ☐ Permanent (*there is no indication of when the job will end*)
  - ☐ Temporary (*the job will terminate at some specified time*)
8. What was your **gross annual salary** in your library position in 2012 (*before taxes and deductions*)?  
\_\_\_\_\_/year

9. Please indicate how often you perform each of the following job functions:

	<b>Never</b>	<b>Sometimes</b>	<b>Frequently</b>		
<i>How often perform Collections . . .</i>					
a. Collection development, evaluation and management	1	2	3	4	5
b. Copyright clearance and IP permissions	1	2	3	4	5
c. Electronic licensing	1	2	3	4	5
d. Digitization of collections	1	2	3	4	5
e. Preservation of collections	1	2	3	4	5
f. Curation of collections	1	2	3	4	5

*How often perform Public Service and Outreach . . .*

a. Reference, information service, and research support	1	2	3	4	5
b. Instruction in library use, resources, and research	1	2	3	4	5
c. Programming and services to special populations (e.g., international populations)	1	2	3	4	5
d. Liaison activities (e.g. with individual faculty, assigned departments, community groups or agencies)	1	2	3	4	5

*How often perform Technical and Bibliographic Services . . .*

a. Cataloguing, database management and organization of information resources (including metadata schemes and Online Public Access Catalogues (OPACs))	1	2	3	4	5
b. Creation and maintenance of bibliographic records	1	2	3	4	5
c. Processing interlibrary loan requests – borrowing and lending	1	2	3	4	5
d. Acquisition, receipt, and payment of library materials	1	2	3	4	5
e. Circulation and discharge of library materials	1	2	3	4	5
f. Sorting, shelving, and filing of library materials	1	2	3	4	5
g. Bindery and materials processing	1	2	3	4	5
h. Repair and conservation of library materials	1	2	3	4	5

*How often perform Information Technology . . .*

a. Library systems, hardware, and software support	1	2	3	4	5
b. Network management and technical support	1	2	3	4	5
c. Web development and applications	1	2	3	4	5
d. Database creation and maintenance (e.g. OPACs)	1	2	3	4	5
e. Digitization or digital preservation initiatives	1	2	3	4	5

*How often perform Professional Development / Participation*

a. Participation in professional organizations	1	2	3	4	5
b. Attendance at conferences and workshops	1	2	3	4	5

*How often perform Research and Publication . . .*

a. Writing research proposals	1	2	3	4	5
b. Conducting literature reviews	1	2	3	4	5
c. Developing methodology for a research program	1	2	3	4	5
d. Conducting quantitative or qualitative research	1	2	3	4	5
e. Analyzing data	1	2	3	4	5
f. Publishing results of research	1	2	3	4	5
g. Presenting research results	1	2	3	4	5



*How often perform Administration and Management . . .*

a. Training and development	1	2	3	4	5
b. Managing library units/activities	1	2	3	4	5
c. Supervision and evaluation of personnel	1	2	3	4	5
d. Organizational planning and decision-making	1	2	3	4	5
e. Policy development	1	2	3	4	5
f. Human resources planning and management	1	2	3	4	5
g. Budgeting and financial management	1	2	3	4	5
h. Managing space, facilities, and building operations	1	2	3	4	5
i. Fund-raising and donor support	1	2	3	4	5
j. Marketing, communications, and public relations	1	2	3	4	5
k. Assessment and evaluation	1	2	3	4	5

## SECTION D: JOB ATTITUDES / JOB SATISFACTION

1. To what extent do you agree/disagree with the following sets of statements about what is important to you in a job and whether that element is part of your library job?

	Strongly Disagree			Strongly Agree		
a. <u>It is important to me to have a job</u> that is challenging	1	2	3	4	5	
b. <u>My job is</u> challenging	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to use information technology skills	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to use information technology skills	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to perform a variety of tasks	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to perform a variety of tasks	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to grow and learn new skills	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to grow and learn new skills	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to supervise others	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to supervise others	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to motivate others	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to motivate others	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to manage a service/department	1	2	3	4	5	
b. <u>My job provides</u> the opportunity to manage a service/department	1	2	3	4	5	

*Business skills generally include the ability to understand or generate a financial statement, budget, business case, service evaluation, or a fund-raising, marketing, communications or, facilities plan.*

a. <u>It is important to me to have a job</u> that allows me to utilize my business skills	1	2	3	4	5
b. <u>My job provides</u> the opportunity to use business skills	1	2	3	4	5

*Leadership involves taking initiative and making things happen through the effective action of others. Skills important for leadership include negotiating, networking, and motivating and having a future vision and a strong community involvement.*

a. <u>It is important to me to have a job</u> that allows me to perform a leadership role	1	2	3	4	5
b. <u>My job provides</u> the opportunity to perform a leadership role	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to advocate on behalf of the library	1	2	3	4	5
b. <u>My job provides</u> the opportunity to advocate on behalf of the library	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to seek out and forge partnerships within my university	1	2	3	4	5
b. <u>My job provides</u> the opportunity to seek out and forge partnerships within my university	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to seek out and forge partnerships outside of my university	1	2	3	4	5
b. <u>My job provides</u> the opportunity to seek out and forge partnerships outside of my university	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to seek out new project opportunities	1	2	3	4	5
b. <u>My job provides</u> the opportunity to seek out new project opportunities	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to participate in decisions about the overall library strategy	1	2	3	4	5
b. <u>My job provides</u> the opportunity to participate in decisions about the overall library strategy	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to participate in decisions about my area	1	2	3	4	5
b. <u>My job provides</u> the opportunity to participate in decisions about my area	1	2	3	4	5
a. <u>It is important to me to have a job</u> that allows me to make decisions about how I conduct my own work.	1	2	3	4	5
b. In my job, I am allowed to make decisions about how I conduct my work	1	2	3	4	5
a. <u>It is important to me to have a job</u> in a dynamic and changing environment	1	2	3	4	5
b. <u>My job environment is</u> dynamic and changing	1	2	3	4	5
a. <u>It is important to me to have a job</u> with little work-related stress	1	2	3	4	5
b. <u>In my job</u> I have little work-related stress	1	2	3	4	5
a. <u>It is important to me to have a job</u> with a manageable workload	1	2	3	4	5
b. <u>In my job</u> I have a manageable workload	1	2	3	4	5

a. <u>It is important to me to have a job</u> that allows me to balance my work and family or personal life	1	2	3	4	5	
b. <u>In my job I</u> am provided with the opportunity to balance work and family or personal life	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that earns a fair salary	1	2	3	4	5	
b. <u>In my job I</u> earn a fair salary	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that receives adequate benefits (e.g. dental, health, pension plan)	1	2	3	4	5	
b. <u>In my job I</u> receive adequate benefits	1	2	3	4	5	
a. It is important to me to have a job where my accomplishments are recognized by the organization.	1	2	3	4	5	
b. In my job, my accomplishments are recognized by the organization.	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that I feel certain will continue	1	2	3	4	5	
b. I feel certain that <u>my job will</u> continue	1	2	3	4	5	
a. <u>It is important to me to have a job</u> that allows me to advance my career <sup>1</sup>	1	2	3	4	5	
b. <u>In my job I</u> am provided with opportunities to advance my career	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am treated fairly, despite my race or ethnicity	1	2	3	4	5	
b. <u>In my job I</u> am treated fairly, despite my race or ethnicity	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am treated fairly, despite my gender	1	2	3	4	5	
b. <u>In my job I</u> am treated fairly, despite my gender	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am treated fairly, despite my age	1	2	3	4	5	
b. <u>In my job I</u> am treated fairly, despite my age.	1	2	3	4	5	
a. <u>It is important to me to have a job</u> in which I am treated with respect by my superiors	1	2	3	4	5	8
b. <u>In my job I</u> am treated with respect by my superiors	1	2	3	4	5	8
a. <u>It is important to me to have a job</u> in which I have a good relationship with my supervisor(s)	1	2	3	4	5	8
b. <u>In my job I</u> have a good relationship with my supervisor(s)	1	2	3	4	5	8
a. <u>It is important to me to have a job</u> in which I have a good relationship with administration	1	2	3	4	5	8
b. <u>In my job I</u> have a good relationship with administration	1	2	3	4	5	8
a. <u>It is important to me to have a job</u> in which I have good relationships with others	1	2	3	4	5	
b. In my job I have good relationships with others	1	2	3	4	5	

2. Overall, how satisfied are you with your current job?
- ☐ Very satisfied
- ☐ Satisfied
- ☐
- ☐ Dissatisfied
- ☐ Very dissatisfied
3. What aspects of your job do you like the most?
4. What aspects of your job do you like the least?
5. What, if anything, would increase your motivation to perform your work?

## SECTION E: CAREER DEVELOPMENT / TRAINING / EDUCATION

1. For the following list, first indicate if you have ever participated in the type / format of training through your current workplace, and if so, the extent to which the training improved your ability to perform your job.

	<i>Participated in</i>		<i>Extent to Which Improved Ability to Perform Job</i>					
	<i>Yes</i>	<i>No</i>	<i>To no Extent</i>			<i>To a great Extent</i>		
								N/A
a. Job-oriented skills training (excluding technology)	1	2	1	2	3	4	5	8
b. Technology skills training	1	2	1	2	3	4	5	8
c. Customer-service related training	1	2	1	2	3	4	5	8
d. Management training	1	2	1	2	3	4	5	8
e. Business skills training	1	2	1	2	3	4	5	8
f. Supervisory training	1	2	1	2	3	4	5	8
g. Northern Exposure to Leadership (NEL)	1	2	1	2	3	4	5	8
h. Library Leadership Program at University of Saskatchewan	1	2	1	2	3	4	5	8
i. Other leadership training (not including NEL or University of Saskatchewan)	1	2	1	2	3	4	5	8
j. CARL Research Institute	1	2	1	2	3	4	5	8
k. Other research-related training (not including CARL Research Institute)	1	2	1	2	3	4	5	8
l. Other professional development (e.g. subject specialty, library issues)	1	2	1	2	3	4	5	8
m. Mentorship training	1	2	1	2	3	4	5	8
n. Job rotation	1	2	1	2	3	4	5	8
o. Job sharing	1	2	1	2	3	4	5	8

2. Are there any other types of training that improved your ability to perform your job that is not covered above?
-

3. Please indicate the extent to which you agree/disagree with the following statements about training, career development, and organizational commitment:

	<b>Strongly Disagree</b>			<b>Strongly Agree</b>	
a. I currently have sufficient education, training, and experience to allow me to perform my job effectively	1	2	3	4	5
b. Given my education, training, and experience, I am overqualified for my current position	1	2	3	4	5
c. Given my education, training, and experience, I am qualified to move into a higher level position	1	2	3	4	5 8
d. I am interested in participating in technology skills training	1	2	3	4	5
e. I am interested in participating in management skills training	1	2	3	4	5
f. I am interested in participating in business skills training	1	2	3	4	5
g. I am interested in participating in leadership training	1	2	3	4	5
h. I am interested in participating in research-related training	1	2	3	4	5
i. I am interested in moving into a position with more responsibility	1	2	3	4	5 8
j. My library provides me with sufficient opportunities to participate in training	1	2	3	4	5
k. I am committed to the goals of this library	1	2	3	4	5
l. I really feel that this library's problems are my own	1	2	3	4	5
m. I would be very happy to spend the rest of my career at this library	1	2	3	4	5
n. I would be very happy to spend the rest of my career in my current position	1	2	3	4	5

4. In thinking about your future career, what kind of training do you feel would provide you with the most important skills required for you to move into a higher level position? (*please be as specific as you can: e.g., training in conflict management, in negotiation, in specific computer programming applications, research-related training, mentorship or job rotation formats*)

5. Are you currently enrolled in a post-secondary program for credit (i.e., leading toward a diploma, certificate, or degree)?  
☐ Yes  
☐ No

6. Please specify the program you are enrolled in (e.g., Library Technician Diploma/Certificate, B.Ed., B.A., MLIS, LLB, MBA, PhD):

## SECTION F: DEMOGRAPHIC INFORMATION

1. What is your gender?

- ☐ Female  
☐ Male  
☐ Other

2. In what year were you born? \_\_\_\_

3. Do you consider yourself to be an Aboriginal person (includes status Indian, non-status Indian, Inuit or Métis)
- ☐ Yes
- ☐ No
4. Do you consider yourself to be a member of a visible minority group?
- ☐ Yes
- ☐ No
5. Do you consider yourself to have a disability that may disadvantage you in employment?
- ☐ Yes
- ☐ No
6. What province do you live in?
- |                                       |  |
|---------------------------------------|--|
| <input type="checkbox"/> B.C.         | <input type="checkbox"/> Ontario       |
| <input type="checkbox"/> Alberta      | <input type="checkbox"/> Quebec        |
| <input type="checkbox"/> Saskatchewan | <input type="checkbox"/> Nova Scotia   |
| <input type="checkbox"/> Manitoba     | <input type="checkbox"/> New Brunswick |

## SECTION G: CONCLUDING QUESTIONS

1. What, in your opinion, are the most pressing human resource challenges the university library sector will face over the next 5 years and why?
2. Do you have any other comments, questions, or concerns that relate to this study or questionnaire?

## APPENDIX C: SUPPLEMENTARY TABLES

**Appendix Table 1: Distribution of Type of Library Staff  
Among Practitioner Sample**

	n	Percent
<b>Total</b>	<b>860</b>	<b>100%</b>
Librarians	402	48%
Other Professionals	62	7%
Support Staff	373	45%
Paraprofessionals	301	36%
Other Support Staff	72	9%

Source: 8Rs 2014 Practitioner Survey

**Appendix Table 2: Demographic Characteristics by Type of Staff**  
(librarian n=336, other professional n = 54, support staff n = 274)

	Percent			
	Female	Visible Minority	Aboriginal	Disabled
<b>Total</b>	<b>80</b>	<b>7</b>	<b>1</b>	<b>6</b>
Librarians	80	6	1	3
Other Professionals	57	9	0	4
Total Support Staff	84	8	1	8
Paraprofessionals	83	8	1	7
Other Support Staff	87	6	0	13

Source: 8Rs 2014 Practitioner Survey

**Appendix Table 3: Age Distribution by Type of Staff**  
(librarian n = 317; other professional n = 51; paraprofessional n = 224)

	Mean Age	Percent			
		<45	45-55	56-60	60+
<b>Total</b>	<b>46</b>	<b>46</b>	<b>30</b>	<b>14</b>	<b>10</b>
Librarians	46	46	32	14	9
Other Professionals	47	35	37	16	12
Paraprofessionals	46	49	26	13	12

Source: 8Rs 2014 Practitioner Survey

# Appendix Table 4: Work Status by Type of Library Staff

(librarian n=336, other professional n = 54; support staff n = 274)

	Percent	
	Temporary	Part-time
<b>Total</b>	<b>9</b>	<b>6</b>
Librarians	11	5
Other Professionals	6	3
Support Staff	8	8
Paraprofessionals	9	6
Other Support Staff	6	13

Source: 8Rs 2014 Practitioner Survey



## **Appendix Table 5: New Librarian Positions Created in Past 5 Years<sup>1</sup>**

(n= 25 libraries; 66 new positions)

### **Public Services** (including reference, circulation / reserve, instruction, liaison, learning commons, and support activities)

- |   |  |
|---|--|
| -Bibliothécaire service au public (santé, sciences et génie)    | -Indigenous Initiatives Librarian and Liaison for First Nations' Studies |
| -Public Services Librarian in health, sciences, and engineering | -User Experience Librarian   |
| -Liaison Librarian, Pharmacy                                    | -Social Science Librarian  |
| -Liaison / Special Projects Librarian                           | -Teaching and Learning Librarian   |
| -Graduate Studies Librarian                                     | -Downtown Campus Librarian   |
| -Manager, Information Literacy                                  | -Bibliothécaire Campus de Longueuil                                      |
| -Services Librarian   | -Outreach and User Experience Librarian                                  |
| -Learning Support Librarian                                     | -Aboriginal Engagement Librarian   |
| -Community Engagement Librarian                                 | -Instruction Librarian, Law  |
| -Clinical Medical Librarian                                     | -Bibliothécaire de référence, Bibliothèque de Droit                      |
| -Research Services Librarian                                    | -Research Liaison Librarian  |
|   | -Student Engagement Librarian  |

### **Technical Services** (including cataloguing / metadata, acquisitions, and support activities)

- Metadata Librarian
- Metadata and Digital Repository Librarian(.5)
- Bibliothécaire aux acquisitions

### **Collections** (including acquisitions, management and preservation of collections in all formats, including special collections)

- |  |   |
|--|---|
| -Geospatial & Data Services Librarian                              | -Collection Assessment Librarian                  |
| -Scholarly Communications  | -Digitization Librarian                           |
| -Bibliothécaire de référence, Livres rare et collections spéciales | -Scholarly Communications and Copyright Librarian |
| -Map Librarian   | -Data Librarian                                   |
| -Digital Archivist   | -Digital Repository Librarian                     |
| -Digital Projects Librarian  |   |

### **Information Technology (IT)** (including digital and web services)

- |   |   |
|---|---|
| -Information Systems Librarian                              | -Web Services Librarian                                   |
| -Bibliothécaire - edimestre, Direction générale (Webmaster) | -Systems Librarian: Web Communication & Interface Design  |
| -Digital Initiatives Technology Librarian                   | -Discovery Systems Librarian                              |
| -Metadata and Digital Repository Librarian (.5)             | -Systems Librarian: Integration and Emerging Technologies |

### **Management** (responsible for budgets and personnel, overseeing operations, and instituting policies and accountability measures)

- Head of [library name] Library
- Assistant Dean (Client Services)
- Head of Systems
- Head, Digital Initiatives
- Head, Discovery & Access
- Associate Dean: User Services
- Head of Access Services

- Head, Collections Development
- Head, Learning & Curriculum Support
- Head, Discover & Delivery Services
- Associate University Librarian,  
Academic Liaison & User Services
- Research Commons Division Head
- Director: Collection Services

#### **Other Staff**

- Assessment Librarian
- Copyright Librarian
- Market Research Information Specialist
- Special Projects Librarian

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Source: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on categorized responses to the question "Please provide new librarian positions (to a maximum of 3) established in your library in the past 5 years."

**Appendix Table 6: Task Performance among Librarians and *Other* Professionals**

	<b>Percent Performing Task at Least Sometimes<sup>1</sup></b>	
	<b>Librarians</b>	<b><i>Other</i> Professionals</b>
	(n=365)	(n=57)
<b>Professional Development / Participation</b>	<b>89</b>	<b>65</b>
Attendance at conferences and workshops	94	73
Participation in professional organizations	85	57
<b>Public Service and Outreach</b>	<b>61</b>	<b>37</b>
Reference, information service, & research support	69	36
Liaison activities	67	48
Instruction in library use, resources, & research	64	39
Programming & services to special populations	41	25
<b>Administration and Management</b>	<b>51</b>	<b>49</b>
Training and development	74	75
Organizational planning & decision-making	66	71
Policy development	65	55
Assessment and evaluation	65	59
Supervision and evaluation of personnel	55	66
Managing library units/activities	54	54
Marketing, communications, & public relations	53	36
Human resources planning & management	45	43
Budgeting & financial management	42	38
Managing space, facilities, & building operations	33	36
Fund-raising & donor support	15	9
<b>Research and Publication</b>	<b>42</b>	<b>23</b>
Conducting literature reviews	53	14
Analyzing data	48	46
Presenting research results	46	21
Conducting quantitative or qualitative research	44	30
Publishing results of research	38	14
Writing research proposals	38	16
Developing methodology for a research program	31	15
<b>Collections</b>	<b>27</b>	<b>15</b>
Collection development, evaluation & management	65	32
Curation of collections	26	5
Copyright clearance & IP permissions	19	14
Preservation of collections	19	18
Electronic licensing	18	9
Digitization of collections	17	11

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question "How often do you perform each of the following job functions?" Section subtotals are averages of all tasks under that section.

**Appendix Table 6 Cont'd**

**Appendix Table 6 (Cont'd):  
Task Performance among Librarians and *Other* Professionals**

	Percent Task Performing at Least Sometimes <sup>1</sup>	
	Librarians (365)	Other Professionals (57)
<b>Information Technology</b>	<b>22</b>	<b>22</b>
Web development & applications	32	20
Library systems, hardware & software support	28	36
Digitization or digital preservation initiatives	22	13
Database creation & maintenance	15	20
Network management and technical support	11	21
<b>Technical and Bibliographic Services</b>	<b>11</b>	<b>13</b>
Cataloguing, database management & organization of Information resources	20	21
Circulation & discharge of library materials	18	14
Creation & maintenance of bibliographic records	17	18
Acquisition, receipt, & payment of library materials	11	18
Sorting, shelving, & filing of library materials	8	9
Processing interlibrary loan requests – borrowing & lending	6	9
Repair & conservation of library materials	4	5
Bindery & materials processing	3	5

Source: 8Rs 2014 Practitioner Survey

<sup>1</sup> Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question "How often do you perform each of the following job functions?" Section subtotals are averages of all tasks under that section.

**Appendix Table 7: Most Common New Specialized Functions of Librarians<sup>1</sup>**  
(n=18)

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Public Services: Includes reference, circulation / reserve, instruction, liaison, learning commons, and support activities)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Research support</li> <li>• Research commons</li> <li>• Bibliometrics</li> <li>• Grant writing</li> <li>• LMS support</li> <li>• Liaison</li> <li>• Circulation on single service desk</li> <li>• Use of technology in instruction (2)</li> </ul> | <ul style="list-style-type: none"> <li>• Instruction learning outcomes</li> <li>• E-learning</li> <li>• User experience</li> <li>• Interoperability</li> <li>• Discovery</li> <li>• Use of technology in research assistance</li> </ul> |
|--|---|

Technical Services:

- Technical skills, generally
- Metadata

Collections: Includes acquisitions, management and preservation of collections in all formats, including special collections)

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Institutional repositories (2)</li> <li>• Data management (3) and preservation</li> <li>• Digitization (2)</li> <li>• Digital information management</li> <li>• Digital scholarship</li> <li>• E-scholarship</li> </ul> | <ul style="list-style-type: none"> <li>• E-Science</li> <li>• Research data</li> <li>• Scholarly communication (3)</li> <li>• Creating access mechanisms to information</li> <li>• Preserving information</li> <li>• GIS (2)</li> </ul> |
|--|---|

Information Technology: Includes digital and web services)

- Information technology, generally
- SC platforms
- Creating new knowledge / information (e.g. through OA initiatives)

Other Specialized Functions:

- Copyright (4)
- Fundraising
- Project planning
- Assessment (2)
- Leadership on workflow design

Source: 8Rs 2013 Institutional Survey

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<sup>1</sup> Based on responses to the question "Please provide the most common specialized functions that librarians are needed to perform more often now compared to 5 years ago."

**Appendix Table 8: Perceptions of Librarian Motivation by Career Stage**  
(n=22)

<b>Statement</b>	<b>Percent Libraries Agreeing<sup>1</sup></b>
Most new librarians are highly motivated	95
Most mid-level librarians are highly motivated	77
Most senior librarians are highly motivated	60

Sources: 8Rs 2013 Institutional Survey

<sup>1</sup> Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question "To what extent do you agree with the following statements about your library?"

**Appendix Table 9: Provision of Scheduling Job Strategies<sup>1</sup>**  
**by Type of Library Staff**  
(n= 22)

	<b>Percent Libraries Providing Job Strategy</b>			
	<b>Librarians</b>		<b>Other Professionals</b>	<b>Support Staff</b>
	<b>2013</b>	<b>2003</b>	<b>2013</b>	<b>2013</b>
<b>Scheduling Flexibility</b>				
Flextime	59	76	55	64
Compressed work weeks	27	33	27	32
Fixed shifts	23	40	14	82
Rotating shifts	23	40	9	50

Sources: 8Rs 2013 and 2003 Institutional Surveys

<sup>1</sup> Based on "yes" responses to the question: "Which of the following job strategies are provided to librarians, other professionals, or support staff?"

**Appendix Table 10: Importance and Provision of Job Attributes among Librarians (by Career Stage), Other Professionals, and Paraprofessionals by Survey Year**

(2014 librarian n = 355, other professional n = 62, paraprofessional n = 301;  
2004 librarian n = 447, paraprofessional n = 420)

Statement	Percent Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>				Other Professionals	Paraprofessionals
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians		
Challenging job important (2004)	91 (93)	96 (96)	90 (93)	90 (90)	89 (n/a)	81 (85)
Job is Challenging (2004)	78 (84)	74 (80)	77 (85)	84 (85)	75 (n/a)	57 (59)
Task variety important (2004)	94 (94)	96 (95)	94 (94)	92 (93)	89 (n/a)	91 (89)
Job allows task variety (2004)	89 (88)	85 (83)	88 (89)	92 (90)	86 (n/a)	78 (76)
Dynamic & changing environment important (2004)	79 (73)	88 (76)	78 (76)	76 (68)	79 (n/a)	64 (52)
Environment dynamic & changing (2004)	71 (71)	57 (60)	75 (73)	73 (74)	65 (n/a)	45 (39)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

**Appendix Table 11: Importance and Provision of Recognition and Empowerment Among Librarians (by Career Stage), Other Professionals and Paraprofessionals by Survey Year**

(2014 librarian n = 355, other professional n = 62, paraprofessional n = 301;  
2004 librarian n = 447, paraprofessional n = 420)

Statement	Percent Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>					
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians	Other Professionals	Para-professionals
Recognized accomplishments important	88	93	86	86	86	81
Accomplishments recognized	52	57	47	58	50	34
Decisions about how I conduct my work important	96	99	96	95	95	91
Make decisions about how I conduct my work	82	73	83	89	81	64
Decisions about my area important	92	96	92	92	96	75
(2004)	(88)	(84)	(88)	(89)	(n/a)	(68)
Make decisions about my area	68	62	67	75	66	31
(2004)	(68)	(51)	(69)	(74)	(n/a)	(35)
Decisions about overall library strategy important	78	77	75	83	63	41
(2004)	(70)	(70)	(72)	(68)	(n/a)	(34)
Make decisions about overall library strategy	39	32	35	53	35	11
(2004)	(46)	(20)	(50)	(53)	(n/a)	(13)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.



**Appendix Table 12: Importance and Provision of Good and Respectful Relationships Among Librarians (by Career Stage), Other Professionals and Paraprofessionals by Survey Year**

(2014 librarian n = 355, other professional n = 62, paraprofessional n = 301;  
2004 librarian n = 447, paraprofessional n = 420)

Statement	Percent Staff Agreeing <sup>1</sup>					
	Career Stage <sup>2</sup>				Other Professional s	Para- professional s
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians		
Good relationship w/ supervisor important	99	100	99	99	98	98
(2004)	(97)	(99)	(98)	(95)	(n/a)	(97)
Have good relationship w/ supervisor	78	86	77	76	82	84
(2004)	(83)	(82)	(85)	(79)	(n/a)	(79)
Treated w/ respect by superiors important	98	100	99	95	96	99
(2004)	(98)	(100)	(98)	(97)	(n/a)	(97)
Treated w/ respect by superiors	73	82	69	75	74	72
(2004)	(76)	(76)	(77)	(76)	(n/a)	(72)
Good relationship w/ administration important	93	93	93	96	98	90
(2004)	(89)	(88)	(90)	(89)	(n/a)	(85)
Good relationship w/ administration	68	75	63	74	68	63
(2004)	(73)	(70)	(76)	(71)	(n/a)	(65)
Important good relationships w/ co-workers	97	99	97	97	92	95
Good relationships w/ co-workers	90	93	89	90	92	86

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

<sup>2</sup> Allocation to career stage is based on year graduated from the MLIS program. Recent graduates are defined as librarians who graduate less than 6 years ago, mid-career librarians graduated between 6 and 24 years ago, and senior librarians graduated more than 24 years ago.

**Appendix Table 13: Good and Respectful Relationships among Other Professionals and Paraprofessionals by Survey Year**

(2014 other professionals n = 62, paraprofessional n = 301; 2004 paraprofessional n = 420)

<b>Statement</b>	<b>Percent Staff Agreeing<sup>1</sup></b>	
	<b>Other Professionals</b>	<b>Para-professionals</b>
Important good relationship w/ librarians (2004)	90 (n/a)	91 (88)
Good relationship w/ librarians (2004)	89 (n/a)	77 (76)
Important treated w/ same respect as librarians (2004)	95 (n/a)	91 (90)
Treated w/ same respect as librarians (2004)	53 (n/a)	45 (43)

Sources: 8Rs 2014 and 2004 Practitioner Surveys

<sup>1</sup>Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to statements pertaining to job satisfaction.

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