Leading the Library (When You're Not In Charge)

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LEADING THE LIBRARY (WHEN YOU'RE NOT IN CHARGE)

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Abstract: Fundamentals of leadership, management, and psychology take center stage in the business world but are often neglected in library training. By applying basic business principles to enhance our leadership skills, we can become more purposeful, organized, innovative, impactful, and successful as librarians, even if we're not in charge. Drawing on the work of thought-leaders in business and librarianship, this article explores the importance, practical implementation, and benefit of casting vision, planning strategically, managing projects, rejecting passivity, building teams, and implementing accountability.

Keywords: Leadership, project management, strategic planning
Academic libraries have embraced the model of learning organizations, in which nimble, responsive collections and services are powered by the expertise of lifelong learners at all levels of the organization. In learning organizations, managers leverage peer influence throughout the organization to drive change rather than relying heavily on their personal power and authority (Osburn 2008). As Kreitz summarized, “Shared leadership has become almost a necessity when it comes to leading change in organizations” (2009, 533).

Shared leadership requires trust throughout the organization. Deans, directors, and management teams must trust the functional expertise of each employee, knowing that the organization learns and improves best when every member develops and shares their own ideas and insights (Gwyer 2009; Castiglione 2006). Holcomb put it this way:

Especially among knowledge workers, expertise trumps position and title in determining who is actually leading . . . The traits and capabilities of good leadership and good followership . . . strongly resemble each other. Informed, energetic, independent leaders and followers . . . possess the capacity to cope with complexity, manage change, and exercise good judgment. (2008, 781)

In a learning organization, followers must be willing to lead and leaders must be willing to follow.

Leadership does not require a position of organizational authority. A leader is any individual who uses his or her behavior to “influence others to willingly follow an idea, process or vision” (Mierke 2014, 70). Leadership can be distinguished from management, which refers more to operational expertise and coordination, but
leaders almost always have some management capabilities (Ammons-Stephens et al. 2009). Leadership is a parallel skill, an add-on to the technical expertise of a job (Jantti and Greenhalgh 2012). Anyone who exerts positive influence through his or her work and relationships can be considered a leader.

Although the American Library Association and its sections have developed and updated competency documents for librarianship over the years, the core competencies of library leadership have only recently been synthesized (Ammons-Stephens et al. 2009). A vast body of leadership literature already exists in disciplines such as business and psychology, full of theoretical concepts and practical ideas just waiting to be applied to librarianship. By actively applying basic business principles to our personal and professional contexts, we can become more purposeful, organized, innovative, impactful, and successful as librarians.

**Cast Vision**

Extraordinary leaders understand the power of asking "why?" In a 2009 TED talk, Sinek compares the psychological influence leveraged by Apple in its “Think Different” campaign. By starting with big-picture motivations, like “we believe in challenging the status quo,” and then revealing a product that allowed consumers to participate in that vision, Apple’s products seemed more enticing than products by
Dell, which were simply introduced on the basis of their interesting features.


Similarly, our individual skills, talents, and job descriptions within the library fall flat without a compelling answer to the question "Why?" Why are they paying you to do your job? What difference does your position make in the life of your library or in the lives of your patrons? On a bigger scale, why does your library even exist? What’s the point? This is not an exercise in nihilism, but rather an opportunity to identify and understand the mission of your parent organization, your library, and yourself.

Casting vision is a core competency for library leadership (Ammons-Stephens et al. 2009). Leaders develop an understanding of how their own scope of work fits into the purposes of the entire library. This understanding helps us become better followers, because discovering the mission and goals of our organization and management teams helps us contextualize our work and understand how our individual contributions help to meet those goals (Holcomb 2008). Ideally, the mission or vision of our organization will inspire us. Even if it doesn’t, “knowing your organization’s priorities and responding to these priorities in a positive way” can build your credibility and influence, possibly leading to future opportunities to shape the organization's mission and vision (Staines 2009, 152).
Within the context of organizational mission, we each have the opportunity to cast vision for ourselves and the areas and teams in which we participate. Creating a compelling summary of our purpose and vision will motivate us to stay active, engaged, and committed to our jobs and outcomes. It can inspire us on difficult days, direct our decision-making, and help us communicate our value to our coworkers, administrators, and constituents. On an individual level, a vision or purpose statement can incorporate our personal values and talents, helping us to connect to our work in a more meaningful way.

What practical steps can we take to cast vision?

**Identify and thoughtfully consider the mission, vision, and purpose statements of your college, library, and/or department’s administrations.**

What are the organization’s goals? Are there specific, explicit connections between those missions? If possible, map out the big ideas and identify ways in which your own department or role contributes to the big picture (Lewis et al. 2013).

**Look at your job description.** Inventory the contributions you make to the library and organization. This may include librarianship, teaching, research, service, and likely some inevitable “other duties as assigned.” Why are these contributions important? How do your activities help the library be successful? What other positive attributes or efforts do you bring to your work?
Consider your personal life and values. What do you love about your job and profession? What aspects of your work seem meaningful to you personally?

Begin to develop a purpose statement. Identify what you do, why you do it, and how it makes a difference (Lewis, et al. 2013). Refine your ideas until they reflect your organization’s vision and are general enough to encompass all of your work yet personal enough to inspire you.

By connecting with the vision and mission of the library in a personal way, we enhance our ability to influence other employees and lead our library toward success, even when we don’t have organizational authority.

Plan Strategically

Strategic planning is the practice that turns the motivational momentum of vision casting into actionable, measurable, practical steps. Making strategic, informed decisions about which projects and tasks to prioritize lets us hone our effectiveness and fulfill the vision we’ve set for ourselves. If casting vision is about asking why we do things, strategic planning asks how we’ll do them. This is the stage when we set goals, establish priorities, define measures, and determine boundaries for our work.

Developing clear, measurable goals for your own performance can bring as much personal clarity and focus as it does for your library. What would it look like if you
achieved the vision you’ve set for yourself? What outcomes would you see if everything you envisioned was accomplished? These are your goals. Write them down using clear and simple words, even if they seem unachievable. These may be long-term goals or even pie-in-the-sky ideals, but working toward them will move yourself and your library toward success. When you've identified these ideas, take the following steps to choose strategic, realistic goals.

**Consider which aspects of your vision-based goals could be accomplished through your efforts.** Break the big ideas down into more manageable, measurable products. By the end of this exercise you should have a list of long-term, medium-term, and short-term goals that, when accomplished, will look a lot like fulfilling your vision. Make an effort to create goals that are “SMART”: Specific, Measurable, Achievable, Relevant, and Time-bound (Doran 1981). Ask questions like these:

- What do I want to accomplish?
- How will I know I’ve accomplished it? What metric or outcome will help me measure my progress?
- How can this be accomplished? What are the steps I’ll take to make it happen?
- How will this help me achieve my personal vision and the vision or goals of my library or department?
- How long will this take? What is achievable in five years? One year? Six months? Four weeks?
Your job description may describe specific metrics, outcomes, or standards that can guide your planning process.

**Involve others.** Goal-setting and strategic planning should not be done in a vacuum. Although your goals may be personal, your vision and plans should reflect the needs and mission of your library and institution. To this end, Holcomb (2008) recommends that you “solicit evaluative feedback from [your] leaders to be sure the support [you] aim to offer does in fact function as desired” (784). Or, as Farrell wrote, “The opportunities are endless, so care should be taken in selecting which opportunity will contribute to individual development as well as advancing organizational goals” (2014, 309). Your supervisors are ultimately accountable for organizational outcomes, but you can be a leader by assuming responsibility for your individual contributions. This personal strategic planning process is an opportunity for you to partner with your supervisors by aligning your effort with the outcomes they need.

**Prioritize your goals and actions.** Your priorities should be based on the benefits each outcome will have for you and your library; put the most effort into the goals that will have significant impact. Staines asserts, “You need to identify what you excel at and what you must excel at, and then work on those essentials first” (2009, 152). She suggests focusing on “defining the requirement for delivering high-payoff results” (149). The idea of high payoff results is important, and it’s what separates “strategic planning” from just “planning.” Maxwell (2005) describes the positive
benefits of sharing your leader's burden. Not only does it show that you are a team player, but it also draws positive attention and increases your value and influence within the organization. Working toward strategic goals benefits you, your leaders, and your entire organization.

**Make deliberate choices about what not to accomplish.** Librarians are helpers, and our libraries are extremely susceptible to mission creep. Offering new services without strategically ending less-useful ones can put an unsustainable strain on resources. As you and your organization change, your strategic goals and priorities will shift (Staines 2009). With the help of your leaders, establish clear boundaries for what you can realistically accomplish and set aside projects that are less valuable to the organization. To the best of your ability, pursue only those projects that help your organization meet its goals (Lewis, et al. 2013). If a task is not contributing to your library’s success, don’t do it.

Ammons-Stephens, et al. (2009) identify strategic planning as a core competency of library leadership. Practice setting short- and long-term goals and identifying well-defined outcomes that, when accomplished in tandem or in succession, will fulfill your vision.

**Manage Projects**
Once you understand your vision and have clear, measurable goals in place, it is necessary to begin managing your projects and putting in the effort that will lead to success. As Sanborn states, “Many people begin their workday by asking themselves what they need to get done. People who act as leaders ask a slightly different question: What important things do I plan to accomplish?” (2006, 50) Business literature is rife with suggestions, technologies, and best practices to help you manage projects, whether in a group or as an individual.

**Start with your goals.** To function as a leader, it’s important to keep a view of the long-term goals and outcomes of any given project while also managing the nitty-gritty, get-it-done details. As Covey advises, “Begin with the end in mind” (2004, 95). Once you understand your goals, you can organize the work and start to get things done.

**Create a plan.** The key to successful project management is being able to break down each goal into a series of tasks, break down those tasks into actionable steps, and keep track of where various elements of the project stand at any given moment. With good project management, the next step or task is always clear, making it easier to stay focused and accomplish each goal. As with goal-setting, action steps should be specific and time-bound, allow for accountability, and have defined evaluative metrics. Organizing these tasks and action steps can as simple as a creating a written list. Electronic tools can also serve to organize projects, from
straightforward task lists in email, Workflowy, or Evernote to fully-featured project management software such as Asana or BaseCamp.

**Communicate.** Your projects will have implications for your supervisor, colleagues, or other stakeholders; it is a good idea to keep relevant parties informed about your progress. Maintaining an open dialog with your community can provide valuable insights, feedback, and resources that can be missed when working independently.

These management elements are the same for group projects, with the added challenges of interpersonal dynamics, communication, and scheduling issues. It is particularly important to have a clearly communicated purpose and plan when many team members will be involved. Whether or not you are the appointed team leader, you can contribute by ensuring that everyone understands what needs to be done, why you are doing it, who is responsible for each task, and when things will happen (Sanborn 2006). By clarifying the concrete elements of each task and actively connecting the work to the vision and goals of your library, you'll set the stage for success.

**Reject Passivity**

One potential pitfall of being a leader who isn’t in charge is that librarians are often interdependent, and it can be frustrating if organizational leaders move slowly or
other circumstances hinder our efforts to make progress. Stanley addresses the necessity of taking initiative in a recent podcast, cautioning, “If you don’t . . . things won’t ever be as good as they could be” (Jones, Scroggins, and Stanley 2014). Sanborn agrees: “Assume you can make a difference, even if only a small one” (2009, 44).

When projects are overwhelming or factors beyond your control interfere with your plans, consider utilizing management tools to organize your time and direct your attention. Time- and work-management systems synthesized by Covey and Allen have become classics in the business world, and they are worth considering for your own day-to-day workflows.

**Evaluate your tasks.** Covey bases his time-management philosophy on a single idea: “Organize and execute around priorities” (2004, 149). He defines tasks using two facets: urgent/not urgent and important/not important. Urgent, important things might constitute a crisis; non-urgent, unimportant things can be considered a distraction. Covey suggests focusing your efforts on tasks that are important but not urgent. In general, these will be high-value activities that help you to accomplish your goals.

**Set a schedule.** Hyatt suggests using the urgent/important test as criteria for scheduling your days and weeks (2015, 12). By scheduling specific time to work on urgent, important projects, and by scheduling less important things around those
appointments, days become more productive. He also recommends creating “themes” in your week, such as specific days to work on creative tasks and other days to focus on interpersonal or collaborative work. Without organizational authority, we may not have the latitude to design every aspect of our schedule. Still, we all have discretionary time. Determining what scheduling works best for us as individuals can be an important step toward productivity, effectiveness, and leadership.

**Develop a system.** The other prominent work-management system was conceived by David Allen. He suggests developing a personal system in which you collect inputs all in one place and process them on a regular basis, taking care of quick tasks, scheduling or delegating tasks that will take longer, and filing useful information. This method allows for fewer interruptions, greater strategic focus, and enhanced productivity in everyday work-life. Allen’s classic book *Getting Things Done* (2002) provides an in-depth examination of these processes; to quickly grasp the basics, consider perusing Hamm’s (2010) review of the Getting Things Done system.

**Plan to stay balanced.** Davis and Macauley remind us that each individual is responsible to manage his/her own energy in a sustainable way (2011, 42). Highly focused work over a long period of time can sap creativity and have other negative effects. It is vital to schedule time for personal renewal and rest, what Hyatt (2015) calls “margin”. While this down time might look like idleness, the intentional rest is
actually an important (but not urgent) aspect of both work and life. Rather than having the negative effects of complacent idleness, scheduling with energy management in mind lets us stay effective and sharp when we focus on important tasks, engaged when we focus on less-important but urgent work, and fully able to enjoy our times of rest.

Implementing a personalized, sustainable system for managing both new tasks and long-term projects is a step toward leadership. Resource-management, self-management, and decision-making are all important competencies for leaders; all of these skills can be strengthened by developing thoughtful, balanced work habits. As Farrell states, “Management and leadership skills are different and a leader needs to develop effective management capabilities as a leader requires both types of skill sets” (2014, 313). Even when organizational momentum is lacking, developing these productive skill sets will empower you to lead the way in getting things done.

**Build Your Team**

Although your role may not involve direct supervision, it is vital to develop relationships and an ethos of teamwork and interdependence in your library. Your own strengths are not enough to ensure the library’s success. Holcomb recognizes “Authentic leaders can’t succeed on their own. They need strong support teams to help them by offering advice, affirmation, and perspective” (2008, 783). Developing
and drawing on the strengths of your coworkers is an effective way to improve outcomes across the library.

Leadership is necessarily relational. Core competencies of library leadership include effectively building relationships, motivating others, communicating, and collaborating (Ammons-Stephens et al. 2009). Maxwell (2005) describes ways that positive influence can be used with managers above you, with your peers, and with subordinates in the organizational structure. Whether or not you have organizational authority, you can still make things better for other people, and, in doing so, you will make things better for yourself as well.

**Foster positivity.** Although leaders must have an honest view of reality, a balanced perspective will always include some positive elements that can be recognized, celebrated, appreciated, and championed. As librarians, we have all seen ideas (and people) that have been sabotaged or undermined by negativity. One challenge and opportunity of leadership without authority is to rally behind the ideas and strategies of our administrators and find ways to make things work for everyone involved (Jones, Scroggins, and Stanley 2014). This positivity can be exerted on a personal level by acknowledging the value other people bring to the organization and choosing to believe the best about people’s behavior and motives (Cole 2011). Positivity and gratitude are winsome attributes, and, when coupled with other leadership strategies, can increase your influence and improve the outlook of your team.
Identify and capitalize on people’s strengths. According to Ancona et al., “only when leaders come to see themselves as incomplete . . . will they be able to make up for their missing skills by relying on others” (2007, 94). Every individual in your library has strengths. Identifying and publicly acknowledging these strengths is an excellent way to encourage and spread positivity. When working in teams, delegate tasks based on people’s interests and strengths to enhance outcomes for both your teammates and the library.

Foster trust and engagement. Communication skills are an irrefutable cornerstone of leadership (Ammons-Stephens et al. 2009); listening to, understanding, and engaging people will always improve communication and outcomes. Maxwell calls this the “leadership loop” (2005, 161). By taking an interest in and getting to know the people with whom you work, you foster respect for them and discover ways in which you can leverage your own strengths on their behalf. Building these relationships gives you credibility and shows that you are trustworthy, creating opportunities for positive influence and mutual success. These relationships should be honest and authentic, not manipulative. “Engagement occurs on a deep level when a person’s core values are tapped. . . . Engagement . . . is authenticated on mutual benefit and trust” (Cole, 130-131). In the context of your library, engaging your coworkers based on “mutual benefit and trust” can only lead to a stronger team and better outcomes.
**Develop motivational skills.** You don’t have to speak a word in order to be a leader. As Ammons-Stephens, et al. said, “Others observe your behavior and are influenced by it, either for better or for worse” (2009, 67). Still, the most effective leaders have strong emotional intelligence and the ability to positively influence the optimism and productivity of their team (Kreitz 2009). A wide variety of influencing tactics can be learned and leveraged, including rational persuasion, collaboration, consultation, and inspirational appeals (Gwyer 2009). With a foundation of trust and respect, and with a clear understanding of your audience, motivational skills are powerful tools that can shape organizational thinking, instigate action, and influence outcomes.

**Build human resources.** Developing your own professional and leadership skills is a core competency for library leadership (Ammons-Stephens et al. 2009). This may include fostering personal attributes such as ethics, honesty, humility, foresight, listening, empathy, or stewardship (Holcomb 2008). Creating opportunities for your coworkers to develop their own skills is another way to exert positive influence.

An added benefit of building your team is contributing to a positive organizational culture. Corporate culture “operates through the power of peer influence rather than direct vertical authority” (Osburn 2008, 41). Your efforts to foster teamwork and participation may be even more effective than the efforts of those in positions of authority. According to Osburn, “The corporate ethos can be guided and nurtured by
management but its raw material still is provided by the worldview and self-view of each individual” (55). By maintaining your own optimism and momentum, and by encouraging your peers to do likewise, you will influence your library’s culture for the better.

**Implement Accountability**

Businesses run on numbers such as sales, revenue, and profit margins. Though libraries have different metrics, accountability can ensure that outcomes are measurable and in line with personal and institutional goals. Strategic accountability is a way to measure whether or not outcomes are consistent with strategic plans (Staines 2009). Outcomes that match library goals indicate success, while inconsistent outcomes indicate that our strategy and efforts need additional development.

Accountability is simply the process of giving an account and accepting responsibility for resources and outcomes in your job. As librarians, we might not be responsible for money, but we all manage resources. At the very least, we are responsible for how we spend our time at work and for meeting the basic job performance criteria set by our employers. By understanding, collecting, and sharing metrics, status updates, and other measurements transparently, we prove
that we are honest and trustworthy (Staines 2009). This enhances our credibility in the organization, a vital component of effective leadership.

The following accountability practices are based on Hyatt’s (2014) suggestions for personal accountability in leadership.

**Know to whom you are accountable.** Every library employee is accountable to a boss or a board of trustees, but it is important to be aware of the other stakeholders who are affected by your actions. Relationships with our customers, colleagues, and team members all benefit from transparent accountability. Identify the people and groups that have a stake in your work, and keep them in mind when considering work plans and communication.

**Plan ahead.** In libraries, accountability may be as formal as an annual review or as casual as a quick status update. Decide in advance how you will keep people apprised of your progress and performance, making sure each stakeholder approves of the plan. Knowing that you will be held accountable for your work or outcomes will help you stay motivated and avoid procrastination, further enhancing your strategic credibility.

**Let it be personal.** Leaders take personal responsibility for the things that happen within their control, especially when the outcome is bad. Credit for positive outcomes should be shared with each contributing team member, but use “I” and
“me” statements to acknowledge and accept responsibility for any negative outcome that was within your control. Agreeing that a negative outcome missed the mark aligns you with the interests of the organization, and reaffirms your personal investment in improving future outcomes.

**Be specific about your contributions.** Practice identifying decisions you made and the results of those decisions. This step draws connections between the large-scale goals and projects of the library and your specific contributions. Describing specific decisions and their outcomes helps to communicate "a causal relationship between... your behavior and the results you achieve" (Hyatt 2014, 5). Ideally, your strategic projects will have well-chosen metrics that offer evidence of your success, proof that your work has made a positive impact on the organization.

**Learn and look ahead.** No one is perfect. You and your library will have plans, events, and entire strategies that flop, but it isn't helpful to focus on the failure. Progress, not perfection, is the worthy goal. Leaders take advantage of each failure as an opportunity to learn, adjust, and try again.

A key business principle related to accountability is the idea of continuous quality improvement. By staying accountable to ourselves and to our stakeholders, we remain continuously aware of our progress and opportunities to improve our process, our products, and ourselves. “Success in meeting targets is a clear indication that the organization [individual] is moving its mission forward” (Lewis,
et al. 2013, 185). Accountability proves that we are making a difference and enhances the trust and influence that we can exert in the library.

**The Benefits of Leading When You’re Not In Charge**

Farrell writes, “As one advances within their career, it is assumed that the individual will possess and tap into leadership abilities in order to effectively lead a unit or organization” (2014, 308). Such professional advancement is just one benefit of developing one’s own leadership skills. According to Feldmann, Level, and Liu (2013), developing leadership skills/roles can also increase your motivation and job satisfaction - it makes you happier! Better still, the more content and engaged you are, the better your library’s outcomes will be (Ammons-Stephens, et al. 2009).

Some libraries have already leveraged the profound personal and organizational benefits of leadership training. The University of Saskatchewan’s University Library introduced an innovative training program that led to a measurable positive shift in the organizational culture of their library (Mierke 2014). Jantti and Greenhalgh (2012) found that career coaching and competency training at the University of Wollongong Library led to appreciation for the individual strengths of each employee. Outcomes included new roles and job descriptions that optimized employee talents; the process transformed some underperforming library staff members into productive, engaged employees.
When organizational leaders recognize that people who aren’t in charge are leveraging positive influence, they create opportunities for those leaders to take on new responsibilities. At the University of Wollongong Library, supervisors created accelerated leadership opportunities for outstanding young leaders (Jantti and Greenhalgh 2012). It is possible, even likely, that it could happen for you, as well.

Maxwell states that “Good leaders in the middle make better leaders at the top” (2005, 279). Borrowing a few key business principles and learning to lead ourselves and others result in stronger careers, teams, libraries, and communities. With enough practice, we will be ready and able to lead our libraries from any position; we might even be in charge.
References


