

MANAGEMENT
BASICS
FOR INFORMATION
PROFESSIONALS

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MANAGEMENT BASICS FOR INFORMATION PROFESSIONALS

THIRD EDITION

G. EDWARD EVANS
AND CAMILA A. ALIRE

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CONTENTS

LIST OF ILLUSTRATIONS // xiii

PREFACE // xv

PART I MANAGERIAL ENVIRONMENT

CHAPTER 1. INTRODUCTION // 3

What Is Management? // 6

What Do Managers Do? // 8

Organizational Skill Sets // 10

Management Concepts // 11

Your Future as a Manager // 22

Key Points to Remember // 24

References // 25

Launching Pad // 26

CHAPTER 2. OPERATING ENVIRONMENT // 31

Formal Organizations // 32

Nonprofit Organizations // 34

Environment and the Organization // 36

Environmental Scanning // 39

Forecasting the Environment // 41

Anti-environmental Views // 43

Organizational Culture // 43

People-Friendly Organizations // 45

Key Points to Remember // 47

References // 47

Launching Pad // 49

CHAPTER 3. LEGAL ISSUES AND LIBRARY MANAGEMENT // 51

Establishing a Library // 52

Libraries, Users, Safety, and the Law // 54

Tort Law and Liability // 63

Malpractice and Librarians // 65

Library Services and the Law // 66
User Privacy // 69
Contracts and Licenses // 73
Copyright // 75
Documentation // 78
Key Points to Remember // 79
References // 79
Launching Pad // 81

PART II MANAGERIAL SKILL SETS

CHAPTER 4. THE PLANNING PROCESS // 85

The Nature of Planning // 86
Types of Plans // 88
Scenario Planning // 99
Project Management // 101
Who Should Plan? // 102
Value of Planning // 103
Key Points to Remember // 103
References // 104
Launching Pad // 106

CHAPTER 5. POWER, ACCOUNTABILITY, AND RESPONSIBILITY // 109

Power // 110
Influence // 113
Authority // 114
Accountability // 116
Governance // 117
Responsibility // 119
Status // 120
The Visible and Invisible Organization // 121
Key Points to Remember // 126
References // 126
Launching Pad // 128

CHAPTER 6. DELEGATING // 131

Trust and Delegation // 134
Creating a Structure or Restructuring // 136

Delegation Options // 138
 Teams // 143
 Committees // 146
 Span of Control // 149
 Centralization/Decentralization // 150
 Learning Organizations // 152
 Key Points to Remember // 153
References // 154
Launching Pad // 155

CHAPTER 7. DECISION MAKING // 157

Decision-Making Environment // 158
 Types of Decisions // 159
 Styles of Decision Making // 161
 Rational Decision Making // 163
 Problem Solving and Rational Decision Making // 164
 Types of Solutions // 166
 Decisions and Accountability // 167
 Individual and Group Decision-Making Processes // 168
 Decision Aids // 170
 Key Points to Remember // 174
References // 174
Launching Pad // 175

CHAPTER 8. COMMUNICATING // 179

Picking the Right Channel for Your Message // 179
 Communication Process // 181
 Organizational Barriers to Communication // 187
 Generational Communication Preferences // 187
 Communication Needs // 188
 Principles of Effective Organizational Communication // 189
 Written and Oral Communications // 192
 Listening // 197
 Other Issues in Communication // 200
 Channels, Direction, and Legitimacy of Communication // 202
 Key Points to Remember // 204
References // 205
Launching Pad // 205

CHAPTER 9. CHANGING AND INNOVATING // 209

- Nature of Change // 210
- Change Process Models // 211
- Resistance to Change // 217
- Implementing Change // 220
- Stress and the Organization // 221
- Innovation and Libraries // 224
- Innovation Techniques // 228
- Key Points to Remember // 229
- References* // 229
- Launching Pad* // 232

**CHAPTER 10. ASSESSMENT,
QUALITY CONTROL, AND OPERATIONS // 235**

- Assessment and Accountability // 236
- Why Analyze Performance? // 237
- What Is Quality? // 243
- Assessment Tools // 245
- User Data Collecting Methods // 253
- Quality Control // 254
- Key Points to Remember // 258
- References* // 258
- Launching Pad* // 260

CHAPTER 11. MARKETING AND ADVOCACY // 263

- Why Market Libraries? // 264
- What Is Marketing? // 267
- Marketing Process // 271
- Internal Marketing // 275
- Marketing Audit // 276
- Branding // 277
- Promotion // 278
- Public Relations // 281
- Advocacy // 284
- Key Points to Remember // 286
- References* // 286
- Launching Pad* // 288

PART III MANAGING PEOPLE

CHAPTER 12. MOTIVATING // 291

- Performance and Motivation // 291
- Motivation and Behavior // 293
- Content Theories // 295
- Process Theories // 298
- Reinforcement Theories // 306
- Motivating Teams // 311
- Public Service Motivation // 312
- Key Points to Remember // 313
- References // 314
- Launching Pad* // 315

CHAPTER 13. LEADING // 319

- What Is Leadership? // 321
- Approaches to Leadership // 322
- Functions of Leadership // 325
- Developing Leadership Skills // 327
- Emotional Intelligence // 328
- One-on-One Learning // 330
- Do Gender Differences Matter in Leadership? // 331
- E-leadership // 332
- Key Points to Remember // 337
- References // 337
- Launching Pad* // 339

CHAPTER 14. BUILDING TEAMS // 341

- Value of Teams // 343
- What Are Teams? // 344
- Before You Start Team Building // 345
- Creating and Maintaining Teams // 348
- Team-Based Libraries // 359
- Key Points to Remember // 360
- References // 360
- Launching Pad* // 361

CHAPTER 15. ADDRESSING DIVERSITY // 365

- Defining Diversity // 368
- How Do You View Cultural Diversity? // 370

Managerial Responsibility // 371
Individual Responsibility // 372
Role of Professional Associations // 372
Planning for Diversity // 373
Library Governance and Diversity // 375
Staffing Issues // 376
Generational Differences // 378
Providing Service to a Diverse Community // 381
Collections and Cultural Diversity // 383
Key Points to Remember // 384
References // 385
Launching Pad // 386

CHAPTER 16. STAFFING // 389

Legal Concerns in Human Resource Management // 390
Determining Staffing Needs // 393
Staffing Process // 395
Recruitment // 399
The New Employee // 405
Developing and Retaining Staff // 407
Performance Appraisal // 408
Corrective Action // 411
Progressive Discipline // 413
Grievances // 414
Unions and Merit Systems // 415
Volunteers // 417
Key Points to Remember // 420
References // 421
Launching Pad // 421

PART IV MANAGING THINGS

CHAPTER 17. MANAGING MONEY // 425

Budget as a Control Device // 426
Budget Cycle // 429
Budget Preparation // 430
Defending the Request // 432
Budget Types // 435

Budget Formats // 437
 Fund Accounting // 445
 Audits and Auditors // 447
 Budget Reports // 449
 Income Generation // 450
 Key Points to Remember // 453
References // 453
Launching Pad // 454

CHAPTER 18. MANAGING TECHNOLOGY // 457

Technology’s Role in Library Operations // 458
 Staff Background and Training // 460
 Technology Planning // 464
 Controlling Technology Costs // 466
 Technology Issues and Libraries // 468
 Cloud Computing // 476
 Social Media // 477
 Collaboration // 478
 Key Points to Remember // 479
References // 480
Launching Pad // 481

CHAPTER 19. MANAGING AND PLANNING PHYSICAL FACILITIES // 483

Library as Place // 485
 Managing the Facility // 488
 Emergency and Disaster Management // 495
 Sustainability // 499
 Planning for New Space // 500
 Moving to a New Location // 505
 Key Points to Remember // 506
References // 506
Launching Pad // 507

PART V MANAGING YOURSELF AND YOUR CAREER

CHAPTER 20. ETHICS // 511

Why Ethics Matter // 512
 Standards, Values, and Codes // 514

ALA's Code of Ethics // 515

Key Points to Remember // 527

References // 527

Launching Pad // 528

CHAPTER 21. PLANNING YOUR CAREER // 531

Career-Planning Process // 533

Marketing Yourself // 536

Flexible Ways of Working // 538

Career Breaks // 540

The Work/Life Debate // 541

Factors That Contribute to Success // 542

References // 543

Launching Pad // 544

INDEX // 545

ILLUSTRATIONS

FIGURES

- Figure 1.1 Organizational Skill Sets // 11
- Figure 4.1 Strategic Planning Model // 96
- Figure 7.1 Decision-Making Styles // 160
- Figure 8.1 Communication Model // 182
- Figure 8.2 Example of a Vague Staff Memo // 184
- Figure 8.3 Example of a Blunt Staff Memo // 185
- Figure 9.1 Lewin's Force-Field Concept // 213
- Figure 9.2 Kotter's Eight-Stage Change Model // 213
- Figure 12.1 Maslow's Hierarchy of Needs // 295
- Figure 12.2 The "Wave Theory" of Needs // 296
- Figure 12.3 Example of Theory Y Misused in a Memo // 300
- Figure 12.4 Participative Management and Motivation Concepts // 308
- Figure 16.1 U.S. Department of Labor Model for Developing
Job Descriptions // 395
- Figure 17.1 Sample Budget Cycle // 430
- Figure 17.2 Sample Line-Item Budget // 438
- Figure 17.3 Sample Performance Budget // 439
- Figure 17.4 Sample Program Budget Request—Fiscal Year 2012 // 442
- Figure 20.1 ALA's Freedom to Read Statement // 516
- Figure 20.2 ALA's Library Bill of Rights // 520
- Figure 20.3 ALA's Code of Ethics // 521

TABLES

- Table 5.1 Division of Roles and Responsibilities // 117
- Table 6.1 Percentages of Staff Time in a Matrix Organization // 148
- Table 7.1 Voting Paradox // 169
- Table 8.1 Workplace Communication across the Generations // 189
- Table 8.2 Principles of Effective Organizational Communication // 190
- Table 9.1 Common Resistance-to-Change Variables // 219
- Table 9.2 Techniques to Foster New Thinking // 227

Table 9.3	Basic “Rules” to Encourage New Thinking	// 228
Table 10.1	Points to Ponder Regarding Quality Service and Millennials	// 246
Table 12.1	The Argyris Continuum	// 301
Table 12.2	Consequences of High and Low Job Satisfaction	// 304
Table 12.3	Likert’s Continuum of Management Styles	// 305
Table 13.1	Characteristics of Managers Compared to Leaders	// 320
Table 16.1	Examples of Major Employment Legislation in the United States	// 391

PREFACE

This edition, like its predecessors, covers the basics of management that you ought to understand as you begin your career as a librarian. As we discuss in Chapter 1, you are likely to be called upon to begin to manage one or more people more quickly than you might expect. Having basic management skills will benefit both yourself and those whom you are asked to manage. Although the basics themselves have not changed since the previous edition appeared, the thinking about their application has evolved, technology has changed, and, most significantly, the economic environment in which libraries must operate is very different. We address such developments throughout the text.

The material is presented in five parts. Part I looks at the context of managerial activities that influence what managers, in both for-profit and not-for-profit organizations, cannot, can, and should do; it includes three chapters, one of which is new—legal issues and library management. Part II includes eight chapters that discuss the skills required to be an effective manager. Part III addresses the essential people managerial skills that all great managers understand; it includes five chapters, one of which is new—building teams. Part IV’s three chapters examine how to manage such things as money, technology, and facilities. Part V presents some insights into managing yourself and your career through two chapters, one of which is new—ethics in the workplace. While the material is presented in a sequential manner, it is important to understand that the practice of management and leadership involves complex activities that are intertwined. This fact is why management is an art as well as a science.

Perhaps the most significant change in this edition is that we had a team of six readers/advisors who reviewed each chapter as it was drafted. Their insightful comments provided invaluable improvements in the edition’s content. As you will see in the following, they brought a wealth of experience from almost all types of libraries. Including the authors’ library management experience, the team that developed this book has more than 175 years of management experience, not counting management teaching experience. If you include the experience of the past American Library Association (ALA) presidents who contributed material, the total library management experience exceeds 300 years.

Another new feature is the presence of sidebars featuring the Authors’ Experience and Advisory Board Experience. As the titles suggest, these boxes present

real-life managerial experiences of the authors and advisory board members. The content is not presented as “best practices” but instead is intended to illustrate what can and does happen in libraries. As you read the text you will note that we have mentioned a number of their articles and books that address management topics.

Here’s a look at who our readers were and, in their own words, their experience:

Dr. Susan Carol Curzon, retired Dean, University Library, California State University, Northridge, from 1992 to 2010: I worked in academic, public, and corporate libraries. My doctorate is in Public Administration from the University of Southern California. My master’s degree in librarianship was from the University of Washington. I was in management positions for 30 years—whew, really?

Dr. Joseph Mika, Professor Emeritus at the School of Library and Information Science, Wayne State University (Detroit, MI): Mika served as Director of the School twice (15 years) during his tenure of 25 years at the University. He was also Assistant Dean at the School of Library and Information Science, University of Southern Mississippi (Hattiesburg); Assistant Library Director at Johnson State College (Johnson, VT); and Assistant Library Director, Ohio State University, Mansfield Campus. His teaching areas included administration, customer service, personnel management, and collection development. He is co-owner of Hartzell-Mika Consulting, a firm that has been in business since 1999, providing assistance with library director searches, strategic planning facilitation, facility development and planning, and staff and board training sessions. Mika is a retired Colonel in the U.S. Army, having served 29 years in the Army Reserves.

Dr. Carol Sinwell, recently retired: Carol Sinwell’s career has included leadership and management duties in both public and academic libraries. For 12 years she worked in one of the largest public library systems in the country, serving in management positions that included children’s service, reference coordinator, branch manager, and staff development. During her 19 years in the academic arena her positions included Associate Dean and Dean of Learning and Technology Services, a division that included the library, six tutorial centers, a testing center, Faculty/Staff Professional Development Center, and technology services. While at the college, Dr. Sinwell completed her second master’s and doctoral degrees and was recognized in 2003 as a “Mover and Shaker” by the American Library Association as part of their recognition of the 50 Most Innovative Librarians in the United States and Canada.

Dr. Glenda Thornton, Director of the Cleveland State University’s Michael Schwartz Library: Glenda Thornton’s career of four decades has included a variety of professional positions in four states. She has been the library director at Cleveland State University’s Michael Schwartz Library for the

past 14 years. Her experience as a library manager and supervisor began while she was in library school and managed a branch library at the University of Oklahoma. She is the author of numerous articles and has been Reviews Editor for *Technical Services Quarterly* since 1997.

Dr. Virginia Walter, retired from the University of California, Los Angeles, Department of Information Studies: Virginia Walter has had a number of managerial and leadership roles in her career: President of the Society of California Librarians, President of the Association for Library Service to Children, middle manager at Los Angeles Public Library, and Chair of the Information Studies Department at UCLA. Now she is retired and content to teach a little, write a little, consult, and train a little—everything in moderation!

Sachi Yagyu, Reference and Consulting Librarian, RAND Corporation: Sachi spent the first 18 years of her career at a private university. She started as an entry-level reference librarian and progressed to the position of Head of Reference and Circulation. Curious about other library environments, she is currently a reference librarian in a not-for-profit, public policy research organization.

In addition, we wanted to offer the words of wisdom of national library leaders noted for their expertise in and/or passion for specific chapter topics. These include ALA past presidents Richard M. Dougherty (1990), Pat Schuman (1991), Betty Turock (1995), Barbara Ford (1999), Sarah Long (1997), Nancy Kranich (2000), John W. Berry (2001), Carol Brey-Casiano (2004), Jim Rettig (2008), Camila A. Alire (2009), and Molly Raphael (2011). We also invited ALA leader James Neal (Treasurer, 2010) to share his wisdom. Their insights, which are reflected at the beginning of appropriate chapters, set the stage for those chapters. We want to thank each of them for their contributions.

G. Edward Evans, Flagstaff, Arizona
Camila A. Alire, Sedalia, Colorado

PART I

MANAGERIAL ENVIRONMENT

Many of us choose the library career path because we like books and information and we like people. We remember the libraries of our youth. These were happy days and we think that getting a MLIS will be the ticket to an idyllic career based on a self-evident good. Building partnerships, being a team player, dealing with the power structure, building a budget, devising and implementing assessment tools, strategic planning, effective reporting, etc., are just some of the topics every librarian will confront in the first two weeks on the job. These topics and more are covered in library management classes and for perhaps the first time confront the aspiring librarian with the hidden policy issues involved in library work. Put another way, think of a library management class as an invitation to look behind the curtain and see what makes a librarian successful—working at any level or in any type of library. Library specific knowledge is great. Library history is fascinating. Knowing about the latest and greatest technological advances impresses library colleagues. But library success is achieved by having insight into how the staff works together and how the library as an institution works with the community. Call it politics or call it library management. Without this sort of insight, success will be elusive. Don't take a library management class at your peril!

—Sarah Long, ALA President, 1999–2000 (2012)

I think the corruption of management as a word is partly the result of a 100-year period of trying to make sense of the big, industrial, hierarchical, bureaucratic, company. All of the words we use around management now are essentially words about how you manage dehumanized, standardized machines that pump out millions and millions of identical products.

—Julian Birkinshaw (2010)

The twenty-first century workforce has experienced tremendous changes due to advances in technology; consequently, the “old way” of doing things may be effective but not efficient. . . . [T]he best way to prepare potential employees for tomorrow's workforce is to develop not only technical but also human-relation abilities.

—Geanna W. Mitchell, Leane B. Skinner, and Bonnie J. White (2010)

Our recent economic turmoil has sparked widespread soul-searching about the approach of business school in educating managers. How is it that so many smart people made poor decisions? In the words of Henry Mintzberg, “The economic crisis is not a financial one. It is one of management, and management education has been a significant part of the problem.”

—Peter Todd (2010)

INTRODUCTION

MITCHELL, SKINNER, AND WHITE'S quotation emphasizes the importance of people skills and abilities and that such skills should be at the center of libraries' operations and services. Todd's citation of Henry Mintzberg, a name you will see often in the following chapters, makes the point that organizations' problems are often traceable back to poor management education. Management education, or lack of, is something of an issue for librarianship, as 43.8 percent of American Library Association (ALA)-accredited library school programs do not require any management course work (Mackenzie, 2009, p. 140). Jeanne Cross (2005), writing about what the future may hold for libraries at a time when a large number of senior librarians have recently retired or soon will be retiring, noted, "This [lack of managerial experience] is particularly troubling in the area of library management where the problem is compounded by fewer librarians choosing library administration as a career path. . . . The problem is not only attracting people to the field but also finding avenues for individuals to gain the skills and experience necessary to become tomorrow's library administrators" (p. 193).

Some of you who are reading this material as part of a required management course may be thinking something like, "I do not expect, nor do I want, to be a manager. All I want to do is be a good ____ librarian." You fill in the blank. You are the not the first to have such thoughts, nor are you likely to be the last. Many of us do not think about or recognize the pervasiveness of the basic management elements (planning, budgeting, and decision making, for example) in our daily lives. And, it is surprising how fast we begin to have to manage when we become librarians. A recent article by Lynne Olver (2011) makes our point: "Some people are born to be library directors. Not me. In fact, that was the last thing on my mind when I entered library school at SUNY Albany in 1980. My entire goal was to be the best reference librarian I could possibly be" (p. 6). She is currently a public library director, although she was neither "born" into it nor officially trained in management techniques. Most of us who have been or are directors, middle managers, or even frontline supervisors did not enter or, in most cases, leave library school thinking our careers would be in management. It just hap-

AUTHORS' EXPERIENCE

On Evans's first day in his first full-time library position he was given an assistant. Had he not had some undergraduate course work in administration he probably would have made a mess of that responsibility. The library school program he graduated from had no management/administration course requirement. He had taken the academic library course, which had a very modest emphasis on basic management knowledge and much less on skills.

Alire, on the other hand, became the library director at a small college at age 24 immediately after receiving her MLS. If it hadn't been for the required management course she took in her MLS program, she also probably would have made a mess of that responsibility. It was her need for more management/administrative education that propelled her to pursue an advanced degree in higher education administration.

pens. This is why the quotation from Sarah Long, past president of ALA, leads this book.

Although several of the opening quotations are not from the library literature, they do apply to library management and library education as much as they do to business. Every organization is managed, successfully or not so successfully. All of us must manage our lives—also successfully or not. In a broad sense, management has been an aspect of human life since individuals started living with one another.

Some years ago, Yale economist Charles Lindblom (1959) described management as “the science of ‘muddling’ through.” People have been muddling for tens of thousands of years. As we became better at working things out, the less muddled the process and outcomes have become. In today's world, the more you know about the process of accomplishing goals—organizational or personal—the less muddled and the more successful you will be.

There are those who claim management is just common sense. They are only marginally correct. What is “common sense” is something one learns to a greater or lesser degree over time. Some people believe that because management is “just common sense” there is nothing to be learned about the activity. However, even those who have such beliefs do receive an “education” through trial and error while they try to find that common sense. Also, it is safe to assume that these are the individuals who engage in the most muddling and, generally, the people who cause the most grief for those who work with them because they seem not to employ a system to their “managing.”

Reading about management, taking a course, or attending some workshops on the subject improves your chances of being better at it. Poor managers can

ADVISORY BOARD EXPERIENCE

Joe Mika, who teaches the basic management course at Wayne State University (Detroit), also points out that students should take the management and administration course because they themselves will have managers. Such course work will help them to understand their managers and directors and how the different administrative styles will affect their careers.

and do hurt their organizations and the people they work with as well as themselves. Course work and workshops will not ensure you will be a good manager, but these tools can improve your managerial skills. Everyone engages in a little “muddling” regardless of training; however, the amount of muddling decreases as the amount of training increases.

Libraries, other not-for-profit (NFP) organizations, as well as government agencies have been rather slow to see the need for formal management training. In fact, such formal training as a core subject in educational programs for librarians is relatively recent. Note, although “type of library” courses do contain some administrative/management elements, their primary focus tends to be on services and programs relevant to the library type, not on basic management concepts.

Higher education programs in business and management schools focus on profit and loss as well as on precisely defined products and markets. Libraries lack both of these characteristics; their “products” vary from library to library, and their markets are highly diverse. That is, each library creates its own approach to providing services based on its assessment of local needs. Lacking precise goals and measures of achievement (such as profits), this meant that, in the past, librarians saw little need for general management training.

The notion that any librarian can be an effective manager shifted to recognition that there is a need for some formal training in management. The Mackenzie (2009) article cited earlier offers an in-depth look at the current status of management education in U.S.-accredited library schools. Formal training provides an understanding of the basic elements of managerial activities and about what tends to lead to successful organizational performance.

One reflection of the changing views regarding management education for information professionals occurred in 1983 at an international conference of educators from the International Federation of Library Associations and Institutions (IFLA), the Fédération Internationale d'Information et de Documentation, and the International Council on Archives. The purpose of the meeting was to explore the possibilities of identifying a universal “core” for the education of information professionals in management. By the end of the conference it

AUTHORS' EXPERIENCE

Evans was a presenter at the 1983 international conference mentioned and was not surprised by the rather rapid agreement reached by educators from around the world on what the core management concepts are for information service work.

was agreed that (1) it is essential to provide all information professionals with management training and (2) there is a core set of topics that the information professional should know (Evans, 1984). In this book we cover all of the core topics (such as planning, decision making, staffing, and budgeting) as well as several that were not part of the identified core (such as legal issues, technology, and career planning).

WHAT IS MANAGEMENT?

Perhaps the shortest definition of management is one attributed to Mary Parker Follett (1941): “management is the art of getting things done through people.” This definition belies the complexity of management yet concisely sums up management. A longer and more complex definition is Daniel Wren’s (1979): “management is an activity essential to organized endeavors that perform certain functions to obtain the effective acquisition, allocating, and utilization of human efforts and physical resources for the purpose of accomplishing some goal” (p. 3). There are literally hundreds of other definitions of the term. All contain two elements: they mention people and activities, and they reference organizations.

Managers direct and facilitate the work of others. There is generally something of a pyramid shape to any organization, with more people involved in working directly with customers than in performing solely managerial duties. Most organizations consist of a “top” (few people), a “middle” (several people), and a “bottom” (many people). This is despite recent efforts to flatten organizational structures. Certainly there has been significant flattening, but a person is hard pressed to identify an organization with less than three levels. Even in a fully team-based organization there is some type of team supervisor(s), team leader(s), and team members.

FOR FURTHER THOUGHT

Find two other definitions of “management.” Now compare the four. What do they have in common? How do they differ?

AUTHORS' EXPERIENCE

Evans developed the first general management course that was not based on a library type at the University of California, Los Angeles library school. For the first several years it was an elective, and 20 to 25 students enrolled each time it was offered. When the school moved from a one-year to a two-year degree program the students voted to have the management course a requirement. As such, the level of student interest in the subject matter became highly varied. For several years after the change to a required course, the first day of the class was devoted to students' views about "management" and their expectations about what path their career would take. Evans offered to bet one month's salary against one dollar that, if the graduate worked in a library for more than 18 months, he or she would be engaged in some type of management activity—if nothing more than looking after a part-time student or volunteer. He never lost a bet.

Discussions were spirited, pointed, and not infrequently bitter. Comments such as "I will never manage anyone; management is manipulation"; "Managers are anti-people; they exploit people"; and "Never trust a manager" were rather common.

After several times teaching the course, Evans developed a definition of management based on the negative comments and used it to get the discussion going by asking how many thought the following was a reasonable definition: "management is getting others to do your work." Many thought it was an accurate statement; it certainly got the discussion going. The discussions also illustrated the fact that most of the individuals with negative views had had one or more bad experiences in the workplace.

The authors' philosophy of management is reflected throughout this text, and it is not that management is about how to get others to do our work. A short version of our philosophy is: "select good people, trust them, delegate authority while retaining responsibility, build true teams, and be supportive."

To support our point, *Library Journal's* 2012 Librarian of the Year Luis Hererra, of the San Francisco Public Library, when interviewed, stated that the advice he received as a library administrator from his mentors was to surround himself with good people. "I have a great team. My mentors all said, 'Surround yourself with good people,' and I did" (Berry, 2012, p. 30).

We believe that supervisors and leaders should engage in team member activities from time to time. One of our professional mottos is "Everyone must get their hands dirty from time to time." This means that when a major task comes up, the entire staff does the work. Having everyone shelf reading, shifting materi-

ADVISORY BOARD EXPERIENCE

Joseph Mika was influenced in his management style by the U.S. Army, which had an approach much like that of Follet (1941)—get results through people—but over the years his approach mellowed to “get results with people.”

als in the stacks, or whatever results in a sense of everyone feeling that they are part of a team and that there is mutual support when needed.

Such sharing of work activities provides supervisors and leaders with a first-hand sense of what frontline staff members face on a day-to-day basis. It also demonstrates they have the professional technical knowledge, experience, and skills to perform, as well as direct, team activities. We will discuss, in Chapter 13, that one element of leadership is the staff’s belief in the technical abilities of their “leader.”

WHAT DO MANAGERS DO?

Just what do managers do? There are many answers to this question, and the question actually contains two issues: function and behavior. Some managerial functions are planning, directing, and budgeting, while behavioral aspects involve the roles filled, such as negotiator or group spokesperson. Writers tend to emphasize one side or the other. This book is organized according to functions; however, we also explore behavioral aspects and place great emphasis on user needs.

Managers and supervisors often say, “I never get my real work done.” This response usually relates to the functional aspects of management. The standard concepts of a manager’s functional activities are outlined in a classic management paper by Gulick and Urwick (1937), in which they coined the acronym POSDCoRB, which stands for the following functions:

- Planning
- Organizing
- Staffing
- Directing
- Coordinating
- Reporting
- Budgeting

POSDCoRB functions underlie, in one form or another, all management behavior; however, they do not describe the work of a manager. They merely identify the objectives of a manager’s work.

TRY THIS

Approach a person you know is a manager. Ask the individual to describe what she or he does. The response will likely be something like, “Well, I’m head of the reference department” or “I’m assistant director for technical services” or “I’m the director of the archives.” These reflect the person’s position rather than her or his work. Further probing is likely to get a response something along the lines of “I attend lots of meetings; I’m on the computer doing e-mail and writing reports, memos, and letters; and I listen to complaints. It seems like I never get anything done.” Another common response is, “I spend most of my day solving problems and putting out brush fires” (behavioral response). Seldom will the answer be, “Oh, I direct, plan, control, delegate, budget, and hire and fire people” (functional context).

Henry Mintzberg (1973) suggested that because the functions fail to describe managerial behavior they are of little use. We believe this is too harsh a judgment, for if we do not know where we are going (that is, if we do not have objectives), how will we know when we get there? By studying POSDCoRB concepts, a person can gain an understanding of what good management attempts to accomplish.

A reasonable question to ask is, “Do all organizational levels engage in the same activities?” A short answer is “yes,” but such an answer obscures many important differences, especially in terms of the skills employed (see Figure 1.1). Senior managers tend to devote more time to planning than do other managers, and planning calls for a major use of conceptual skills. They also tend to devote more time to interacting with a variety of people both internal and external to the library. Such interaction calls for strong interpersonal-relations skills. Finally, they engage in very little direct user service work, and thus they make limited use of the technical skills they once employed when they became a librarian.

A good discussion of differences in skill set usage by level of responsibility is Robert Katz’s (1974) “Skills of an Effective Administrator.” Mahoney, Jardee, and Carroll (1964) also discuss the concept of time spent on various activities, but

FOR FURTHER THOUGHT

POSDCoRB—think of an example of each of these functions. Remember that they are principles, not descriptions of the work of the manager.

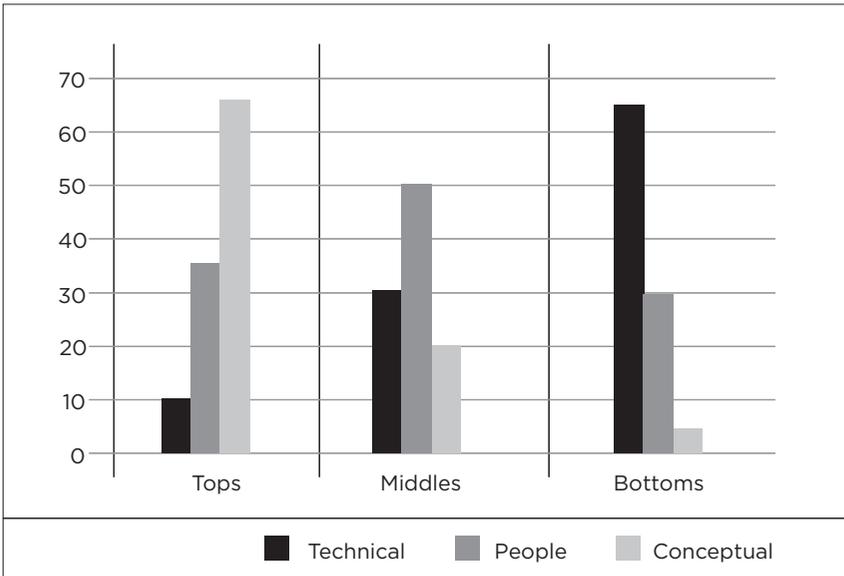


Figure 1.1 Organizational Skill Sets

they approached it from bottoms to tops. For bottoms, the emphasis is almost a mirror opposite of the tops: great emphasis on technical skills, a strong component of human-relations skills, and only limited use of conceptual skills. As always, middles are in between: less use of technical skills than bottoms but more than tops and a greater need for conceptual skills but less than for tops. You can envision these differences in terms of percentages. For a bottom, perhaps 60 to 70 percent of the emphasis is on technical skills, 20 to 30 percent on human relations, and the balance on conceptual abilities. Middles would perhaps be 20 to 30 percent technical, 10 to 50 percent human relations, and the balance conceptual. Conceptual abilities would be 40 to 50 percent for tops, with technical skills at 10 percent or less, and the balance involving human relations.

ORGANIZATIONAL SKILL SETS

Henry Mintzberg (1971, 1973, 1975) has had the greatest general influence in the area of how managers behave and how knowledge of behavior should change how management is taught. His critique of the functions approach led him to suggest that looking at the roles played would be more effective. He identified ten roles divided among three categories: interpersonal, informational, and decisional. Under interpersonal are three roles: figurehead, leader, and liaison. The informational category contains the roles of nerve center, disseminator, and spokesperson. Decisional activities include the roles of entrepreneur, disturbance handler, resource allocation, and negotiator. We suggest that there is a fourth role under informational: politician. To some extent such a role is part of being a figurehead, leader, negotiator, and spokesperson. However, given the

AUTHORS' EXPERIENCE

Alire team-teaches a course in a managerial leadership doctoral program on managing libraries in a political context. The idea for the course came from a national board of advisors who recommended such a course within the context of organizational culture and who thought it was one course that students in managerial leadership need to be successful as managerial leaders. The course is required in the PhD program. Invariably, students from each PhD cohort have mentioned that it was probably one of the most relevant courses in their program, especially when they became a head of a library.

social and political changes that have occurred since Mintzberg carried out his research (in the 1970s), the political role has become ever more important.

Without question, Mintzberg's work added substantially to our understanding of what managers actually do. For teaching and learning purposes, however, the approach does not work very well, because the research on which he based his concept focused on top managers and, to a lesser extent, on middle managers, and it focused on observable activities rather than on the reasons for the activities. Also, it does not represent a full picture of a manager's work; as we noted, the role of politician is not clearly delineated. Because of these deficiencies, the classic "functions" approach is still the most useful method for newcomers to conceptualize managerial responsibilities. We will, at various points in later chapters, note how Mintzberg's ideas come into play.

As in many fields, there is a question of whether management is an art or a science. Our belief is that, despite elements of science, management is an art. Although a person can learn the basic concepts, principles, functions, techniques, and roles, each management situation is unique. Two situations may appear similar, but the individuals involved will be different. Even similar situations that involve the same personnel are unique. Thus, what worked yesterday may or may not work today. Your ability to read the changes and make appropriate adjustments is the real art of management.

MANAGEMENT CONCEPTS

Many people have influenced how organizations were and are managed. It is important to understand that while organizations change and operate over time, the underlying basics of management functions remain in place.

Looking at management literature you quickly discover that, although people have managed organizations for thousands of years, it is only within the past 150 years that there has been serious interest in what it takes to have a successful operation. Furthermore, only in the past 60-plus years has there been widespread research into management operations and activities.

In this section we briefly explore the development of management thought and how the process is reflected in library operations. One reason for devoting space to such a discussion is to provide you with a sound base for assessing the latest management ideas (which often are only passing “fads”—think of total quality management, or TQM) put forward by consultants and others who make their living by churning out “secrets” to organizational success. The real secrets lie in understanding the fundamentals and applying them thoughtfully. Most of the “new” approaches are merely repackaged older ideas about the basic functions of management.

We cover eight approaches to thinking about management:

1. Scientific
2. Administrative
3. Behavioral
4. Management science/quantitative
5. Systems
6. Contingency
7. Quality
8. Composite

As you might guess, management practice and theories have evolved over time. You might also correctly suspect the approaches became ever more complex by taking into account more and more variables. They also became more focused.

Deciding where to begin the review was a challenge; we finally settled on covering some of the best-known individuals who published their thoughts on the subject. This is not to suggest that many others did not contribute to how we practice management today.

SCIENTIFIC MANAGEMENT

One of the first people to write about his ideas of “effective” management was Frederick W. Taylor (1856–1915). His book *Principles of Scientific Management* (Taylor, 1947) has appeared in many editions over the years. He focused on manufacturing organizations and how to make them as efficient as possible (time and motion studies) and on what would be a fair wage for the workers meeting the standards. Contrary to what you might read elsewhere, Taylor was not anti-worker—he believed that efficient operations made work less stressful or tiring and that workers should be paid for their efficiency.

Scientific management had a number of followers, some of whom you may recognize. For example, you would know Frank (1911–2001) and Lillian (1878–1972) Gilbreth if you have seen the film *Cheaper by the Dozen* (2003, 20th Century Fox). The Gilbreths’ many refinements to work–motion study methodology were their major contribution to the field. They also were among the first to emphasize an organization’s need to “develop” employees to improve employee morale and effectiveness. Lillian Gilbreth (1914) was one of the first people to write about industrial psychology that focused on employee issues.

KEY POINTS TO REMEMBER

Scientific Management

- Economic issues are workers' primary motivation factor.
- Organizations, because they control economic rewards, can direct worker behavior through those rewards.
- The distrust between workers and management and the lack of understanding about what was a "fair day's work" could be removed by using scientific (rational) studies.
- A rationalized work activity would lead to an acceptable basis of compensation (task plus bonus) that would be beneficial for both worker and management.

Another figure whose last name is widely known, if not much else about the man, is Henry Gantt (1861–1919). He was a protégé of Taylor's; they worked together early in Gantt's career. Gantt's task and bonus plan has led some people to view Gantt as more humanitarian than Taylor. Gantt's major contribution was developing charting techniques for projects and activities that still carry his name (Gantt, 1916, 1919). You will find his techniques useful throughout your managerial career.

Following World War II, libraries began applying a combination of scientific management ideas and some of the mathematical/operations-research techniques developed during that war. Richard Dougherty and Fred Heinritz's (1982) *Scientific Management of Library Operations* and Dougherty's (2008) more recent work *Streamlining Library Services: What We Do, How Much Time It Takes, What It Costs, and How We Can Do It Better* are representative of libraries' concern with efficient operation. As you move into greater managerial responsibility you learn that efficient and effective library operations are essential.

ADMINISTRATIVE APPROACH

Two of the proponents of this approach are Henri Fayol (1841–1925) and Max Weber (1864–1920). Other notable figures are Lyndall Urwick (1891–1983) and Chester Barnard (1886–1961).

Henri Fayol was both a practitioner/manager and a thinker about management. He believed his success was due to skills he developed over the years as well as his ideas about what it takes to be an effective manager. He published his "principles" in 1916 in *Administration Industrielle et Generale* (Fayol, 1962). Fayol's 14 principles of management, with the major points for each, follow:

1. Division of labor—workers perform best (are most productive) when they specialize.
2. Authority and responsibility—giving orders and being responsible must go together.

3. Discipline—this arises from having clearly defined policies and rules for staff.
4. Unity of command—employees must have only one supervisor.
5. Unity of direction—units must operate in a unified effort to achieve organizational goals.
6. Subordination of individual to general interest—employees must focus on organizational rather than personal interests while on the job.
7. Remuneration—wages for staff must be appropriate and fair.
8. Centralization—authority should be “reasonably” centralized to ensure overall organizational direction.
9. Scalar chain—an organization must have a formalized structure for authority and communication.
10. Order—relationships among units should be logical and ensure a timely flow of information and materials.
11. Equity—employee treatment should be fair and equitable.
12. Stability of tenure—high employee retention is a hallmark of a well-managed organization.
13. Initiative—managers should encourage employee initiative, especially in terms of how they might improve their work performance.
14. Esprit de corps—managers should strive to achieve high morale and team spirit in their units.

Lyndall Urwick was perhaps one of the first and strongest English-speaking supporters of Fayol’s concepts. He was a British management consultant who emphasized a “Fayolian” approach. His book *Elements of Business Administration* attempted to integrate all the work of leading management thinkers and was his greatest contribution to the field (Urwick, 1943).

Max Weber, with his classic work on bureaucracy, became a key figure in management thinking. Although his study was of how governments operate, when you think about his concepts you will see how they apply to some degree to almost any large organization, including libraries.

Weber (1947, pp. 330–332) identified seven traits as characteristic of an “ideal” bureaucracy (e.g., organization):

1. It has continuous organization of official functions bound by rules.
2. It has a specific sphere of competence.
3. The organization of offices follows the principle of hierarchy; that is, each lower office is under the control and supervision of a higher one.
4. The rules that regulate the conduct of an office may be technical rules or “norms.”
5. It is a matter of principle that the members of the administrative staff should be completely separated from ownership of the means of production or administration.

KEY POINTS TO REMEMBER

Administrative Approach

- Worker motivation is a primary factor in effective productivity.
- Social interaction factors are equally as important as, if not more important than, economic factors in employee motivation.
- Self-actualization is a workplace issue because it motivates most people.
- Research in the field of human behavior in search of concepts applicable in the workplace is important.

6. There is a complete absence of appropriation of official positions by incumbents.
7. Administrative acts, decisions, and rules are formulated and recorded in writing.

You may have a negative view of “bureaucracy” and think that libraries more or less fit his model. Whether an individual organization fits the positive or negative image of a bureaucracy depends on its managers and staff. When run properly, a classic bureaucratic organization provides effective, efficient, rational, and humane service. No organization is good or bad in itself. It is the staff operating an organization that determines its positive and negative characteristics.

Chester Barnard was the leading proponent of examining management in terms of twentieth-century profit organizations. His book *Functions of the Executive* is perhaps the most insightful of any written on the character of organizations (Barnard, 1938). He based his book on a combination of practical experience and extensive study of sociology, psychology, and philosophy.

BEHAVIORAL APPROACH

There is a connection between the scientific management and behavioral approaches. As we noted earlier, Lillian Gilbreth’s book addressed industrial psychology, not scientific management and its importance to effective management. Hugo Munsterberg (1863–1916) is probably the best candidate for being the founder of the behavioral approach to management. His book *Psychology and Industrial Efficiency* makes the case for applying psychology to the workplace (Munsterberg, 1913). He proposed three major foci: identifying the person with the proper characteristics to perform the job (skills, attitudes, physical abilities), developing methods to identify the ideal psychological condition for engaging in a task, and creating optimal motivational influences on the worker. He drew on scientific methods, specifically conducting experiments to accomplish the field’s goals. His work led to the development of preemployment skills testing.

KEY POINTS TO REMEMBER**Behavioral Approach**

- The behavioral approach focuses on organizational issues in a holistic manner.
- It recognizes that managers, not just workers, need training and development.
- It focuses on activities that are still relevant in today's organizations.
- It provides a solid basis for thinking about organizational structure and its operational implications.

Most management textbooks in the United States devote some space to Elton Mayo (1880–1849). Mayo led a research team from Harvard's Graduate School of Business Administration that undertook a long-term study of worker fatigue and productivity at Western Electric's Hawthorne, Illinois, plant. The purpose of that study was to determine the validity of a suggestion (by the Gilbreths) that brief rest periods would improve production.

In 1927, his team began a series of experiments by making changes in such things as having rest periods and allowing a light lunch in the morning and afternoon. No matter what changes took place, production improved. Sick time and tardiness dropped to about one-third the level of the employees not in the study, and supervision time shrank to a minimum.

The study's important outcome is known as the "Hawthorne Effect," and it is common in all studies of human behavior. That is, an observer's presence and the subject's awareness of the observer result in atypical behavior. In the case of the Hawthorne workers, they saw themselves as a special group getting special attention and wanted to maintain that special status, so they always

IMPORTANT TO NOTE

From the mid-1960s to 1980, libraries and archives began shifting away from the director-controlled management approach to one involving the professional staff, if not the entire staff. Human relations management in libraries usually means democratic administration, staff participation in decision making, and use of committees.

By the mid-twentieth century, management thought began to focus on one element of the basic concepts discussed. Each of the following approaches plays some role in how today's organizations operate.

performed better regardless of the change. However, we cannot predict in any given case what the effect will be of observing staff: they may become nervous and perform very badly; they may work harder than normal; or they may see your presence as a threat and respond with the performance that will cancel the perceived danger.

Mayo's research confirmed the concept that an honest concern for workers pays dividends in terms of performance. He also highlighted the fact that a manager's style was an important factor in employee motivation and, ultimately, in productivity (Mayo, 1933).

MANAGEMENT SCIENCE/QUANTITATIVE APPROACH

There are a variety of subfields within management science or the quantitative approach. Operations research, decision analysis, simulation, forecasting, game theory, mathematical modeling, management information systems, project management, and data mining are but a few of the variations.

A major figure in management in general and in management science in particular was Herbert A. Simon (1916–2001). He was an early leader in the fields of quantitative modeling of human behavior, artificial intelligence, and problem-solving strategies (simulation). His book *Administrative Behavior* (Simon, 1947) focused on the behavioral and cognitive processes involved when people engage in rational decision making. Any decision involves a choice selected from a number of alternatives; through modeling the process and alternative choices, the organization can and should make a better decision.

Two other notable individuals, who to some degree collaborated with Simon, are Richard Cyert (1921–1998) and James G. March (1928–). Their seminal work, *A Behavioral Theory of the Firm* (Cyert and March, 1963), explored organizational decision making. They challenged the idea that organizations always operate “rationally” and in their own best interests. They concluded that although organizations intend to operate rationally, the real-

KEY POINTS TO REMEMBER

Management Science/Quantitative Approach

- Organizational issues can be approached rationally and logically.
- Employing mathematical modeling for the purpose of predicting alternative outcomes and results improves decision making.
- Modeling decisions and actions leads to better solutions.
- The approach is useful for both complex and unstructured problems/situations.
- Incorporating computing power is the key to successful modeling.

ity is rather different. The authors suggest a variety of variables, both internal and external, that cause decisions and actions to occur that are at odds with rationality.

SYSTEMS APPROACH

General systems theory draws on the concept that everything is part of a larger system. A system regardless of type (biological or social) consists of interdependent parts with four basic components—input, transformation, output, and feedback. Ludwig von Bertalanffy (1901–1972), a biologist, is the person most writers credit with founding this approach. His purpose was to develop a theoretical framework that would apply to any academic discipline. In its simplest form, the theory holds that all organizations exist in an environment; they take “inputs” (people, resources, money) from the environment, process (“transform”) the inputs, and produce “outputs” that go back to the environment with constant “feedback” taking place (von Bertalanffy, 1950). Russell L. Ackoff (1919–2009) is another significant figure in the fields of operations research and systems theory. He coauthored with C. West Churchman and Leonard Aronoff (1957) *Introduction to Operations Research*, which helped define the field.

Perhaps one of today’s best-known “systems approach” people is Peter M. Senge (1947–), who has promoted the concept of the “learning organization.” His “cornerstone” discipline in *The Fifth Discipline* (Senge, 1990) is systems thinking, which leads to a holistic approach to organizations and the people who work in them. You will find his book and many others on learning organizations in new-book bookstores, and the idea is discussed in current library literature.

The five “component technologies” of a learning organization are:

1. Systems thinking
2. Personal mastery
3. Mental models
4. Building shared visions
5. Team learning

KEY POINTS TO REMEMBER

Systems Approach

- The interdependency of all the parts of an organization must be recognized.
- Interdependency thinking focuses attention on the fundamentals—input, transformation, output, and feedback.
- Systems thinking makes it clear that organizations are complex rather than simple in character and thus require complex thinking and planning.

Senge puts systems theory to work in a very practical manner. One of his key points is that much of what is done in the name of management is too simplistic and therefore fails to recognize organizations as complex systems (a focus on parts rather than on the whole).

CONTINGENCY THEORY

Contingency theory holds that there are no universal answers in management. Rather, the manager must view each situation as unique and determine what steps are appropriate on a situation-by-situation basis. In this approach, “size” encompasses more than the number of people; it includes outputs as well as resources (facilities and capital). Some of the ideas regarding size (the percentage of the organization involved in “overhead” activities, increased structuring, and decreased power concentrations) are being rethought in today’s tendency toward maintaining flatter bureaucratic structures and smaller staff numbers.

Mary Parker Follett (1868–1933) was one of the first women to be recognized for her contributions to management theory. Recognition was a result of her explorations of a wide variety of management topics in the 1920s—leadership, power and authority, conflict management, empowerment, teams, and what she termed the “law of the situation.” Her background was in philosophy and social work, and while most of her career occurred during the scientific management period and while she agreed with some of its principles, she believed there was undue emphasis on authority/control. One of her major contributions was developing the idea that management leadership should not, and cannot, come from the power of formal authority but rather from a person’s knowledge and expertise.

Fred Luthans (1939–) suggested that you need to specify upon what and in what ways the situation depends in order to manage effectively (Luthans, 1973). For example, sometimes in one environment, tightly defined jobs with

KEY POINTS TO REMEMBER

Contingency Theory

- Managers need to employ a variety of strategies and techniques when dealing with people and activities—no one approach is always “right.”
- Selecting the appropriate strategies and techniques calls for a solid knowledge of research into organizational theory as well as an assessment of the environment.
- Environmental scanning is a key component of this approach (see Chapter 2 for a detailed discussion of this topic).
- “Diagnosis” of situations is a skill managers should develop in order to select actions that fit the circumstances.

“close” authoritarian supervision can result in high productivity and employee satisfaction, while in another environment such an approach would be disastrous. He also placed a strong emphasis on leadership.

Two important researchers in this area are Tom Burns and George M. Stalker. They explored how the environment impacts an organization, its structure, and its operations. They identified two types of environment—stable and innovative (Burns and Stalker, 1961). Fred Emery and Eric Trist (1965) expanded Burns and Stalker’s ideas into four such environments (see Chapter 2 for a discussion of their concepts).

QUALITY APPROACH

Quality as an approach began generating interest in libraries in the 1990s and early 2000s. It focused on customer satisfaction by providing high-quality goods and services. Some of the labels for this approach are quality control, quality assurance, quality circles, and total quality management. The concept went beyond “quality” to include “just-in-time” delivery of resources and services—the right equipment and technology for the job when needed—and eliminating waste.

Although many individuals worked in this area, two early figures are W. Edwards Deming (1900–1993) and Joseph Juran (1904–2008). Both spent much of their career in Japan and assisted in the transformation of Japanese methods of production and quality control. Their success in those endeavors turned Japan’s economy around, and U.S. firms became interested in what some believed to be the Japanese “secrets to success.” This was before it became widely known that Deming and Juran—both Americans—were the “secrets.”

Deming was invited to Japan by industrial leaders and engineers to help counteract the negative perception of the quality of Japanese products. Rather quickly his “14 points” of management became a basis for operating many Japanese firms (Deming, 2000):

1. Maintain constancy of purpose.
2. Adopt a new philosophy—waste, delays, and poor quality are unacceptable.
3. Cease dependence on mass inspection.
4. Stop using lowest price as the sole factor in accepting bids from suppliers.
5. Improve every process.
6. Institute on-the-job training.
7. Eliminate arbitrary numerical goals.
8. Permit/encourage pride of workmanship.
9. Lead with the aim of helping people do the best possible job.
10. Drive out fear—solve the problem rather than look for someone to blame.
11. Break down barriers between units and people.
12. Encourage and support self-improvement and educational goals of staff.
13. Clearly define top management in terms of quality and productivity.

14. Eliminate slogans, exhortations, and targets asking for zero defects or new levels of productivity.

Joseph Juran went to Japan in the mid-1950s to conduct a series of executive seminars addressing such topics as planning, organizational issues, management's responsibility in maintaining quality goods and services, and goal setting. He published his ideas in *Managerial Breakthrough* (Juran, 1995). There are three key pieces to this approach—quality planning, quality improvement, and quality control. Another feature of his thinking is the importance of the internal customer (e.g., another library department) as well as the external consumer (e.g., users, other libraries, vendors) of the goods or services.

You can probably see why quality service to the “end user/customer” is important to library operations. Libraries' sole purpose is to provide service, and anything but quality service should be unacceptable. Certainly, limited funding and limited staffing create challenges and, all too often, make it impossible to do all we wish we could. However, such challenges should not deter us from thinking about and doing the very best we can.

KEY POINTS TO REMEMBER

Quality Approach

- Successful organizations have satisfied customers.
- Satisfied customers are developed and retained when they receive high-quality goods or services from an organization.
- Maintaining high-quality goods or services requires a staff that is committed to quality.
- Staff commitment is best achieved through staff involvement in teamwork, planning, and decision making.

COMPOSITE APPROACHES

We end this brief review of management approaches with a discussion of Peter Drucker (1909–2005) and Henry Mintzberg (1939–). Each has had a long and distinguished career as a scholar and a teacher of management. They are not associated with any particular management approach, but rather they draw from the vast array of options available to contemporary managers. If anything, they are closest to the contingency approach. Also, they draw on ideas, concepts, and theories from any academic discipline that offers something for managers to ponder and, in some cases, implement. Certainly you will find frequent references to these scholars throughout this book, as their wide-ranging approaches also reflect our views about management.

KEY POINTS TO REMEMBER**Composite Approaches**

- Management is a multidimensional activity.
- Useful management concepts are found in almost every academic discipline.
- Effective managers do not restrict themselves to a single approach.
- Effective managers read on a regular basis about a wide variety of topics beyond management.

YOUR FUTURE AS A MANAGER

Earlier we mentioned that many library school students do not see themselves as ever becoming a manager. However, the fact is that you, more often than not, will quickly find yourself being a “manager.” In today’s tight economic conditions, libraries face staffing shortages, along with other financial concerns, that result in such things as vacant positions being unfilled and new positions impossible to secure. These in turn often mean newcomers are asked early on to assume some managerial duties. You are better served, as are those you first supervise, if you have thought about what to do when called upon to assume some supervisory duties before the call comes.

Today’s effective managers employ the full range of options in the management tool kit, choosing which to use at any given time depending on the circumstances—a mix of the contingency and composite approaches. Almost everyone has a preferred managerial style; good managers are flexible and change approaches when it is necessary. Doing so is the art of management—drawing on the basics, developing the skills to assess situations quickly and accurately, and having a finely honed set of people skills.

If you accept the idea that management is an art, it goes without saying that there is a need to develop a personal style. Furthermore, in moving from one management role to another, slight variations will emerge in that style. Individuals do not respond to everyone in the same way. A management style must change as situations and the persons involved change. A corollary of the statement that management is an art is that there is no such thing as a “correct” style. Many of us have had the opportunity to observe two persons of differing personalities and styles effectively manage the same organization. Such an experience is the clearest demonstration that a variety of management styles can be effective in the same work situation.

You might well start the thinking process by assessing your personal strengths and weaknesses. Here are some sample questions to consider:

FOR FURTHER THOUGHT

Regularly scanning recent issues of two or three general management journals, such as *Harvard Business Review* or *Library Management*, is one easy method to keep current with trends and new approaches. We provide a list of some of our favorite titles for doing this in this chapter's Launching Pad section.

- What are the positive work experiences that I've had?
- What was it about those experiences that made them good?
- What were my worst work experiences? What made them so?
- What don't I like done to me?
- What type of direction or supervision do I like?
- What type of directions am I comfortable giving?
- Can I, and how do I, tell someone that he or she has done a good or a bad job?
- What management approaches do I find most comfortable?

As you develop answers to such questions, you are drafting your own management style.

AUTHORS' EXPERIENCE

The authors employed different management styles; however, each was successful in their own ways.

Evans's preferred method was a mix of management by objectives, maximum delegation, and trust in those he worked with. That was the starting point in each new work relationship and remained so for as long as the individuals were successful. When there were problems, he adjusted the style to better match the situation.

Alire, recognized as a change agent, preferred a humanistic management style, believing that a flatter organizational structure provided for more staff involvement and input. This in turn allowed more buy-in to the established strategic directions. With that structure came more responsibility and accountability on the part of staff. Coupled with effective communication and strong interpersonal relations skills, this style was key to her management success.

ADVISORY BOARD EXPERIENCE

Carol Sinwell's management style evolved over time. As she moved from K-12 classroom teacher/manager to public library manager to community college library/learning resources manager to college classroom/manager, she learned about and practiced many theories and faced many realities.

Key to Sinwell's development was quality mentoring by senior managers, and she tried to carry on that practice with her employees. She recognized the importance of genuine communication and personal interaction with staff, especially when working in a team environment. "Knowing yourself" and "knowing the organization culture" were critical if programs and staff development were to reach fruition. Learning to appreciate different personality styles, that is, the strengths and weaknesses individuals bring to the workplace, enhanced team productivity. Cross-training and using collaborative work teams are essential in libraries to provide quality, comprehensive services with reduced resources and to meet the emerging learning needs in the public and college environs.

Joseph Mika's preferred administrative style is based on the contingency theory, and he refers to it as "situational." He has been a library administrator and active in library and information science (LIS) programs for over 30 years, and he has also been influenced by education in management courses from business schools, LIS classes, and U.S. Army programs. Over the years what developed was a participative management style that considers the individual who is being managed and takes actions.

KEY POINTS TO REMEMBER

- Managing is a pervasive activity, and it has been part of humankind's environment for as long as people have lived together.
- Thinking you will never become a "manager" as a librarian is counterproductive, as almost all of us do manage to some degree and much sooner than expected.
- Learning about management concepts and practices does not ensure success, but that knowledge can assist in avoiding mistakes that hurt everyone involved.
- Studying the major approaches to management and some of the major thinkers is part of the learning process for successful managers.
- Understanding the options available as well as understanding yourself is important in developing your own style.
- Locking into a single style is not wise, as different people require different approaches.
- Being flexible is one of the cornerstones to being a successful manager.

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Management Journals Well Worth Regular Reading

General Management

Academy of Management
Executive Association News
Harvard Business Review
Journal of Business Ethics
Journal of Management
Journal of Managerial Issues
Leadership and Organization Development Journal
Management Science
MIT Sloan Management Review
Organization Science
Performance Management and Metrics
Public Administration Review
Public Personnel Management
Strategic Change Supervision

Library Management

American Libraries
Bottom Line
College and Research Libraries
Computers in Libraries
Evidence Based Library and Information Practice
Feliciter

Information Management Journal
Information Outlook
Information Technology and Libraries
Journal of Academic Librarianship
Journal of Library Administration
Knowledge Quest
Library Administrator's Digest
Library and Archival Security
Library Leadership and Management
Library Trends
School Library Monthly

The journals listed are certainly not the only worthwhile ones to read on a fairly regular basis, but they are some we have found valuable during our careers as managers.

INDEX

A

- AASL (American Association of School Librarians), 247
- abilities, of team, 350
- abuse, verbal, 59–60
- academic libraries
- establishment of, 52
 - librarian careers at, 532
 - organizational structure of, 132
- access
- ethics of, 515, 519
 - Internet access filtering, 476
 - to library resources, 66–69
 - library rules for, 59
 - library server “up” time, 459–460
- accountability
- assessment and, 235–237
 - audits/auditors, 445–447
 - committees and, 148, 149
 - decision making and, 161, 167
 - factors of, 116
 - group decision making and, 169–170
 - in library governance, 117–119
 - power/responsibility and, 108, 109–110
 - responsibility vs., 118–120
 - of teams, 146–147, 348, 357–358
 - visible/invisible organization, 121–125
- accounting, fund, 445–446
- accreditation agencies, 238, 240
- Ackoff, Russell L., 18
- ACLU (American Civil Liberties Union), 59, 69
- acquired needs theory, 297–298
- ACRL. *See* Association of College and Research Libraries
- ADA (Americans with Disabilities Act), 66–67
- Adams, Helen R., 68, 524
- adaptability
- adaptive leadership, 324
 - adaptive solutions, 166
 - of library space, 501, 502
- Adler, Paul, 342–343
- administrative accountability, 116–119
- administrative approach, 13–15
- administrative budget, 435
- administrative goals, 409–410
- advertising
- as form of promotion, 279
 - for job openings, 399
- advocacy
- definition of, 263
 - importance of, 284–285
 - for library budget, 432–434
 - lobbying vs., 263–264
 - quotations on, 262
 - social marketing vs., 270
 - tactical, 285–286
- affiliation, 297–298
- affirmative action, 391
- Ahmed, Prevaiz, 224
- ALA. *See* American Library Association
- Albright, Kendra, 40–41
- Alderfer, Clayton, 297
- Alexander, Ralph S., 279
- alignment strategic plan, 89
- Alire, Camila A., 330, 371, 498
- Alire’s P2 Principle, 122
- Allen, David, 137
- alliances, 124
- ALSC (Association for Library Service to Children), 485
- Altman, Ellen, 253
- Amabile, Teresa, 310–311
- American Association of School Librarians (AASL), 247
- American Civil Liberties Union (ACLU), 59, 69
- American Libraries* (ALA member magazine)
- bilingual collections articles, 366
 - on Boston Public Library Trustees, 118
 - on budgeting, 424, 431

- American Libraries* (cont.)
 on Contra Costa County Library system lawsuit, 69
 on library access/behavior policies, 59
 reviews of new/renovated libraries, 502
 on U.K. public library branding, 278
- American Library Association (ALA)
 advocacy resources, 285
 @ your library logo, 277, 278
 Code of Ethics. *See under* Code of Ethics (ALA)
 code of ethics, standards of service, work of SRRT, 511
 on diversity, role of, 372–373
 diversity documents of, 366
 Freedom to Read Statement, 512, 516–519
 “friends” groups, information about, 450
Library Advocates Handbook, 284
 Library Bill of Rights, 520
 library ROI studies, 242
 Office for Diversity, 366, 373
 Office for Intellectual Freedom, 68
 “Policy on Confidentiality of Library Records,” 474, 523
 on public library funding cuts, 431
 RFID webpages, 73
 Spectrum Initiative, 373
 standards, values, codes of, 514–515
 TechSource Online, 458
 templates for letters, 283
 user privacy policy webpages, 70
- Americans with Disabilities Act (ADA), 66–67
- Ames, Kathryn, 482, 488
- analytical style, of decision making, 162
- Anandarajan, Murugan, 193
- Anderson, Dave, 514
- Andreasen, Allen
 on social marketing, 270
 strategic marketing process, 271
 on user-oriented marketing, 268–269
- Andrews, Rhys, 37
- anger, 60–62
- Angoff, Allan, 65
- annual budget form, 448
- Ansoff matrix, 94
- anti-environmental views, 43
- Anythink Libraries, Adams County, CO, 484
- appealed policy, 97
- Appelbaum, Steven H., 331
- applicant
 application forms, 399–400
 application process, 536–537
 cover letters, statements of interest, 400
 final decision about, 404–405
 interviewees, suggestions for, 538–540
 interviews with, 401–403, 537–540
 in recruitment process, 399
 tests for, 400–401
 verification/evaluation of, 403
- application forms, 399–400
- application process, 536–537
- architect, 502, 503–504
- Argyris, Chris, 301–302
- Armstrong, J. Scott, 94
- Arnoff, Leonard, 18
- Arthur, Diane, 200
- asbestos, 55–56
- Asher, Joel, 200
- assessment
 accountability and, 235–237
 leadership assessment instruments, 326–328
 performance analysis, reasons for, 237–243
 performance appraisal, 408–411
 for quality control, 243–245, 254–258
 of staffing needs, 393–395
 of team performance, 346
 user data collecting methods, 253–254
- assessment tools
 balanced scorecard, 252–253
 benchmarking, 250–251
 LibQUAL+, 249–250
 selection of, 245
 Six Sigma, 252
 standards, 246–249
 total quality management, 249
- assimilation, of messages, 198
- Association for Library Service to Children (ALSC), 485
- Association of Academic Health Sciences Libraries, 100
- Association of College and Research Libraries (ACRL), 246–247, 248, 514–515
- Association of Research Libraries, 74
- @ your library logo, 277, 278
- Athenian model of motivation, 310
- attention, to communication, 180
- Au, Lai-chong, 100
- Aubert, Benoit A., 468
- Audet, Lynda, 331
- audits
 anxiety about, 447
 categories of, 446–448
 definition of, 446
 financial audit, 447
 marketing audit, 276–277
 security audits, 493

- authority
 - acceptance of, 114–115
 - cultural differences in view of, 183
 - definition of, 110
 - description of, 114
 - status and, 120
- Avolio, Bruce, 335
- Axson, David, 99
- Ayala, Jacqueline, 375–376, 383

- B**
- baby boomers, 379, 380–381
- balanced scorecard, 252–253
- Baldwin, Ester, 210
- Balfe, Bruce E., 99
- Baltazar, Ramon, 358
- Bamford, David, 216
- Barnard, Chester
 - on acceptance theory of authority, 115
 - administrative approach contributions by, 13, 15
 - on organizations, 32
- Barnard, Susan B., 249
- Barnes, Susan B., 71, 475
- Barsoux, J. L., 223
- Bartels, Jos, 187
- Bartlett, Frederic C., 184
- Barwise, Patrick, 273–274
- Bazerman, Max, 144, 510
- Beagle, Donald, 502
- Beamer, Linda, 377
- Bebbington, Laurence W., 472
- Beckhard, Richard, 221
- Beeson, John, 130
- behavior
 - customer behavior analysis, 273–274
 - disruptive user behavior, 57–62
 - of employee, 413–414
 - ethics, modeling, 513
 - leader as example setter, 326
 - of managers, 8–10
 - motivation and, 293–294
 - quantitative approach and, 16–17
 - reinforcement theories, 306–311
- behavioral approach, 15–17, 322
- behavioral goals, 409–410
- behavioral style, of decision making, 163
- Behrnd-Klodt, Menzi L., 472
- beliefs
 - diversity and, 368
 - politics of, 125
- Bell, Steven J., 461
- benchmarking
 - for library assessment, 250–251
 - for quality control, 254–255
- Bender, Laura, 146
- benefits, employee, 393
- Benjamin, Beth, 336–337
- Benjamin, Susan, 62
- Bennis, Warren
 - on judgment, 158
 - on leader self-assessment, 327–328
 - on leaders/managers, 319
- Berlo, David, 180
- Bernfeld, Betsy, 146, 360
- Berry, Jahna, 538
- Berry, John W., 340
- Beruvides, Mario, 343
- best-in-class benchmarking, 251
- BFOQs (bona fide occupational qualifications), 391–392, 398
- bias, 163–164
- Bielavitz, Tom, 253
- Bierstedt, R., 113
- bilingual collections, 366–367
- Bill of Rights (ALA), 515
- biometrics, 474
- Birkinshaw, Julian, 2, 223
- Black, Alistair, 487
- Black, Janice A., 215
- Blanchard, Oliver, 478
- Blass, Thomas, 513
- Blenko, Marcia, 156, 161
- Block, Peter, 123
- block diagrams, 256
- blogs, 195–196
- Bloor, Geoffrey, 45
- blue-collar work, 343
- board of trustees
 - diversity among, 375–376
 - governance by, 117–118
- body language, 199–202
- Boisse, Joseph, 139
- Bolles, Richard Nelson, 539
- bona fide occupational qualifications (BFOQs), 391–392, 398
- Bonabeau, Eric, 163
- Bonn, Ingrid, 39
- Bonnette, Ashley E., 377
- Boone, Mary, 159
- Boston Consulting Group matrix, 94
- Boston Public Library, 118, 282
- Boston Research Group, 344
- Bouguet, Cyril, 224
- Boyatzis, Richard, 222, 542

- Boyer, George, 37
branding, 277–278
Branyon, Angie, 503
Brattin, Barbara, 145
Breeding, Marshall, 459, 476
Breighner, Mary, 491
Brett, Charles, 252
Brewer, Miriam, 370
Brey-Casiano, Carol, 178, 193
Bridges, Mark, 394
Bright, Leonard, 312–313
Brightman, Baird, 217
Broadbent, Marianne, 479
brochures, for library promotion, 280
Broida, Peter B., 417
Brown, Jeanne M.
 on ACRL standards, 248
 on assessment, 234, 241
Brown, Karen, 217, 222
Bryson, John M., 102
Buchanan, Leigh, 158
budget
 budget cycle, 429–430
 as control device, 426–429
 formats, 437–444
 management of, 425–426
 preparation of, 430–432
 reports, 448
 request, defending, 432–435
 technology costs, controlling, 466–468
 types of, 435–436
budget cuts
 dealing with, 431–432
 politics of, 433
 staffing needs and, 393–394
budget formats
 line-item, 437–438
 performance budget, 438–439
 program budget, 439–440
 program budget, sample, 442–443
 zero-base budget, 440–441, 444
budget reports, 448
budget request
 defending, 432–435
 line-item budget, 438
 sample program budget request, 442–443
 well-crafted request, 426
building program, 503
Bunge, Charles, 222, 223
bureaucracy, 14–15
Burnes, Bernard, 215, 216
burnout, 223–224
Burns, James McGregor, 323
Burns, Tom, 20, 39
Buschman, John, 432
Butler, Amy, 340
Butler, Rebecca P., 472
Butters, Alan, 72
- C**
cafés, in libraries, 486
Caiden, Naomi, 432
Cailluet, Ludovic, 103
Cairns, Virginia L., 234, 241
California State University–Los Angeles, 238
Cantor, Nancy, 330
capital budget, 428–429
capital project funds, 445
career
 career breaks, 541
 career-planning process, 533–536
 flexible working practices, 540
 interviewees, suggestions for, 538
 marketing yourself, 540
 plan for, importance of, 531–533
 quotations on, 530
 success, factors that contribute to, 542–543
 work/life debate, 541–542
Cargill, Jennifer, 433, 447
Carlson, Dawn S., 371–372
Carroll, Lewis, 85
Carroll, Stephen, 9
Carrott, Gregory, 44
Cartwright, Dorwin, 111–112
Carvell, Linda P., 533
Cascio, Wayne, 335
Casey, Mary Anne, 254
Castiglione, James, 323
Castiglione, John, 42
Cavanagh, Mary, 282
censorship
 intellectual freedom and, 520
 lawsuit against library involving, 68
 self-censorship by librarians, 522
Centanni, Kristen, 530, 535
centralization, of organization, 150–152
Cervone, H. Frank, 168
Chan, Rachel, 503
Chaney, Lillian, 123
change
 adaptive leadership and, 324
 change process models, 212–217
 of environment, 38–39
 as essential, 209–210
 implementing, 220–221
 incremental, 211–212

- innovation and libraries, 223–227
- innovation techniques, 227–228
- in Lewin's force-field analysis model of change, 213–214
- management of by leader, 325
- monitoring of for career, 543
- moving to new location, 505
- nature of, 210–212
- of organizational structure, 131–133
- quotations on, 208
- resistance to, 217–220
- staff resistance to technology changes, 461–462
- stress and, 221–223
- team empowerment and, 352
- channels of communication, 181–186, 192, 202–204
- charge, team, 349–350
- charismatic authority, 114
- charter, team, 349–350
- Chartered Institute of Marketing, 267
- Chicago Public Library, 484
- Chief Information Officer (CIO), 479
- Child, John, 43
- children
 - confidentiality of library records of, 72
 - Family Place Library, 485
 - Internet filtering for, 476
 - public libraries with arrangements for, 65
 - unattended, library liability situation, 64–65
- Children's Internet Protection Act (CIPA)
 - First Amendment implications of, 52
 - library services and, 67–68
 - quotation on, 50
 - requirements of, 476
- Choate, Mark, 195
- Chonko, Lawrence B., 510, 513–514
- Christopher, Connie, 146, 353
- Chugh, Dolly, 144
- Churchman, C. West, 18
- CI (competitive intelligence), 38
- Cialdini, Robert, 192
- CIPA. *See* Children's Internet Protection Act
- circulation records, 70
- Civil Rights Act of 1964, 391
- Clapp, Melissa, 340
- classification system, for jobs, 396
- Clayton, Peter, 435
- cloud computing, 476–477
- CMI (Copyright Management Information), 469–470
- coaching, 329–331, 349, 354–355
- coalitions, 124
- Coatney, Sharon, 318
- code of ethics
 - ethical climate of organization and, 514
 - for reduction of ethical conflict, 512
- Code of Ethics (ALA)
 - access, 515, 519
 - copy of, 521
 - coworkers, 524–527
 - elements of, 512–513
 - intellectual freedom, 519–520, 522
 - in new employee orientation, 514
 - on privacy, 522–524
- coercive power, 111
- Cole, Bryan R., 238
- collaboration
 - with cloud computing, 476–477
 - between nonprofit organizations, 34–35
 - for technology, 458, 478–479
- collaborative communities, 342–343
- collection dust, 489
- collections
 - bilingual, 366–367
 - cultural diversity and, 383–385
 - digital collection management, 469–473
 - disaster and recovery plan for, 496–498
 - funds for in budget, 436
 - library building sustainability and, 500
 - use of library funds for personal interest, 525–526
- collective bargaining units, 393
- Collett, Peter, 200
- Colorado Revised Statutes*, 52–53
- commitment
 - organization's commitment to using teams, 345–346
 - to people, for team creation, 348–349
 - resistance to change and, 218
 - to social media, 477–478
 - with teams, 345
- commitment volunteer, 418
- committees
 - benefits of, 147, 148
 - decisions, accountability for, 167
 - disadvantages of, 148–149
 - group decision making, 168–170
 - in participative management, 310
 - setting up, 148
 - teams vs., 344–345
- communication
 - channels, direction, legitimacy of, 202–204
 - for delegation, 135, 136
 - disagreement, conveyance of, 201
 - downward, 202

- communication (cont.)
 - e-leadership and, 332, 334–335
 - electronic, 193–195
 - generational preferences, 187–188
 - hearing impairment and, 202
 - importance of, 179–181
 - listening, 197–199
 - needs, 188–189
 - for negotiation, 124
 - nonverbal communication cues, 199–202
 - oral, 196–197
 - organizational barriers to, 187
 - organizational communication principles, 189–191
 - process of, 181–186
 - quotations on, 178
 - resistance to change and, 218
 - with staff, diversity and, 377
 - between team members, 347
 - teams and, 356–357
 - technical words/jargon, use of, 201
 - upward, 202
 - in visible/invisible organization, 121
 - written, 192–193, 202
- community
 - collaborative communities, 342–343
 - e-environment and, 332–333
 - marketing audit, 276–277
 - marketing to, 263
 - providing service to diverse community, 381–383
- competition
 - in disturbed-reactive environments, 37–38
 - environmental scanning variable, 40
 - esteem needs and, 296
 - for resources, 33
- competitive benchmarking, 251
- competitive intelligence (CI), 38
- compliance, 74
- composite approaches, 21, 22
- computers, upgrading, 465
- consensus, 342
- conceptual style, of decision making, 163
- conclusions, jumping to, 199
- conduct, 413–414
- confidentiality
 - intellectual security, 474–476
 - privacy ethics, 522–524
 - user privacy, legal issues of, 69–73
 - verification of applicant's education/work history and, 403
- conflict
 - anger, defusing, 60–62
 - cultural conflicts in workplace, 382
 - ethical, 511–512
 - in formal organizations, 33–34
 - in group decision making, 168, 169–170
 - organizational development and, 221
 - team empowerment and, 353–354
 - in teams, 144, 147, 342
- Conger, Jay, 192, 336–337
- Conlon, Donald, 173
- Conner, Tiffani, 373
- Conroy, Barbara, 191
- consortia
 - collaboration for technology, 478–479
 - establishment of through law, 53
 - group decision making, 169–170
 - library assessment for, 238, 239
- content theories
 - acquired needs theory, 297–298
 - ERG theory, 297
 - function of, 294
 - hierarchy of needs, 295–297
 - motivation, 295–298
 - wave theory of needs, 296, 297
- contingency plan, for budget shortfalls, 431
- contingency solutions, 166–167
- contingency theory
 - best-known individuals in, 19–20
 - of leadership, 322–323
- Contra Costa County Library System, Antioch branch, 69
- contract work, 540
- contracts
 - for digital content, 470–471
 - legal issues of, 73–75
 - of library, 73–74
 - negotiation of, 75
 - of unions, 416
- Contreras, Sylvia, 526–527
- Cook, Colleen, 250
- Cook, Eleanor I., 378
- Coombs, W. Timothy, 283
- coping methods, 223
- copyright
 - complexity of, 75–76
 - digital content and DMCA, 469–470
 - importance of for libraries, 51–52
 - legal issues of, 75–78
 - library services and, 76–78
 - privacy ethics and, 522–524
 - resources on, 472
 - WIPO's definition of IP, 76
- Copyright Management Information (CMI), 469–470

- corrective action, for staff, 412–413
 corrective solutions, 166
 cost accounting, 257
 Costco, 78
 costs
 of decisions, 152
 of moving to new location, 504–505
 for new library space, 500–501
 span of control and, 149
 of staff technology training, 461
 of technology, controlling, 466–468
 of technology, rise of, 457
 Cottrell, Terry, 426
 Cotts, David G., 488
 Council on Library and Information Resources, 471
 Counting Opinions, 250–251
 Coutu, Diane, 143–144
 cover letters, 400
 Covey, Stephen, 137
 coworkers, 524–527
 Coyle, Karen, 248
 Cravey, Pamela, 494
 creativity, 210, 223–224, 229
 Crews, Kenneth D., 76–77, 472
 crime, 493–494
 critical success factors (CSFs), 464
 Cronin, Blaise, 265
 Cross, Jeanne, 3
 Cross, Roger, 437
 cross-training, of team members, 347
 Crow, Robert, 358
 CSFs (critical success factors), 464
 Cuillier, Cheryl, 359
 cultural conditioning, 293–294
 cultural diversity
 bilingual collections, 366–367
 collections and, 383–384
 cultural conflicts in workplace, 382
 description of, 368–369
 providing service to diverse community, 381–382
 staffing issues, 377–378
 view of, 370–371
 culture
 mental programming by, 368
 nonverbal communication and, 201
 See also organizational culture
 culture shock, 372
 Cummins, Caroline, 171
 curriculum vitae (CV), 536–537
 Curzon, Susan, 215, 401
 customers
 customer behavior analysis, 273–274
 customer/user option for delegation, 141
 environmental scanning variable, 40
 marketing to, 263
 CV (curriculum vitae), 536–537
 Cyert, Richard, 17
- D**
 Dahlkild, Nan, 487
 Dale, Ernest, 150, 151
 Dallas Public Library, policy on body odor, 59
 Dalrymple, Prudence, 243
 dangers, 37–38
 D'Annunzio, Laura Sue, 142, 143
 data
 collection for library marketing, 270
 data gathering for strategic planning, 91–92
 for marketing plan, 267
 for performance appraisal, 410–411
 for quantitative decision making, 171–173
 user data collecting methods, 253–254
 data mining, 170–172
 database usage, 70–71
 David, Fred, 92
 Davidhizar, Ruth, 200
 Davies, Eric, 71
 Davis, Diane C., 527
 Davis, Jan, 38
 Davis, Mari, 171
 Dawson, Patrick, 45
 DC (Dublin Core), 471
 DCMI (Dublin Core Metadata Initiative)
 standards, 247
 De Clippeleer, Inge, 530
 De Mesa, Alycia, 278
 De Vos, Ans, 530
 Dearnley, James, 71
 decentralization, of organization, 150–152
 decision aids, 170–174
 decision flow chart, 256
 decision making
 accountability and, 167
 centralization/decentralization and, 150, 151, 152
 by committee, 148–149
 communication and, 179
 decision aids, 170–174
 for e-leadership, 332
 environment of, 158–159
 importance of, 157–158
 individual/group decision-making processes, 168–170
 by leader, 325

- decision making (cont.)
 - by organizations, 17
 - in participative management, 309–310
 - quotations on, 156
 - rational, problem solving and, 164–166
 - rational decision making, 163–164
 - solutions, types of, 166–167
 - styles of, 161–163
 - team empowerment and, 353
 - by teams, 144, 146–147
 - for trust, 134
 - types of decisions, 159–161
- decision package, 444–445
- decision tree, 172–173
- decisional roles, 10–11
- definition, in project life cycle, 101
- delegating
 - centralization/decentralization, 150–152
 - committees, 147–149
 - delegation options, 138–143
 - learning organizations, 152–153
 - organizational plans/goals and, 131–133
 - quotations on, 130
 - span of control, 149–150
 - task structure, creating/restructuring, 136–138
 - teams, 143–147
 - trust and, 134–136
- delegation, definition of, 131
- Deming, W. Edwards
 - on data, 274
 - on performance appraisal, 411
 - quality approach, contributions of, 20–21
 - as TQM writer, 249
- Dempsey, Kathy, 262, 268
- Dempsey, Lorcan, 460
- Dennis, Nancy K., 498
- DeRosa, F. J., 59
- developmental internships/fellowships, 541
- Dewey, Barbara I., 367
- Dewilde, Thomas, 530
- Deyrup, Marta Mestrovic, 371–372
- Diaz, Joseph, 146
- Dickson, G. W., 462
- Dickson, Marcus, 143, 344
- differential advantages analysis, 274–275
- differential marketing analysis, 273
- digital content, 469–473
- Digital Library Federation (DLF), 471
- Digital Millennium Copyright Act of 1998 (DMCA), 77, 469–470
- Digital Object Identifier (DOI), 471
- digital preservation copies, 77
- digital revolution, 458–459
- Digital Rights Management (DRM), 471
- DiMattia, Susan, 263
- diplomacy, 202
- direct collecting, 270
- directive style, of decision making, 161–162
- disabilities, people with
 - access to library services, 66–67
 - diversity and, 369–370
- disaggregated organization, 132
- disagreement, 201
- disaster preparedness
 - deferred maintenance projects, 496–497
 - emotional responses after disaster, 499
 - experiences with, 495
 - plan for, 495–496
 - recovery plan, 497–498
 - team for, 498
- discipline, 413–414
- discrimination, 391–393
- disruptive user behavior, 57–62
- distance education, 77
- distribution/expense budget, 435
- disturbed-reactive environments, 37–39
- diverse community, providing service to, 381–383
- diversity
 - Authors' Experience, 384
 - challenges for library managers, 365–367
 - collections and, 384–385
 - cultural diversity, 370–371
 - definition of, 368–370
 - generational differences, 378–381
 - individual responsibility, 372
 - library governance and, 375–376
 - managerial responsibility, 371–372
 - organizational culture and, 45
 - planning for, 373–375
 - professional associations, role of, 372–373
 - providing service to diverse community, 381–383
 - quotations on, 364
 - staffing issues, 376–378
- diversity and diversity management (D&DM)
 - plan, 375
- DLF (Digital Library Federation), 471
- DMCA (Digital Millennium Copyright Act of 1998), 77, 469–470
- Doan, Tomalee, 210
- documentation, 78–79, 414
- DOI (Digital Object Identifier), 471

- donors
 - fundraising for library, 449–452
 - relationship with, 451
 - doubt, 87
 - Dougherty, Richard M.
 - scientific management contributions by, 13
 - on streamlining library activities, 13, 234, 235, 257
 - Douglas, Ceasar, 147
 - Drake, Brian, 30
 - Dresang, Eliza, 101, 236
 - Dresser, Norine, 200
 - Drewes, Jeanne, 491
 - Drickhamer, David, 389
 - Driggers, Preston, 420
 - DRM (Digital Rights Management), 471
 - Drucker, Peter
 - composite approach of, 21
 - on planning, 84
 - on team motivation, 311
 - Dublin Core Metadata Initiative (DCMI)
 - standards, 247
 - Duchon, Dennis, 30
 - Dugan, Robert E., 238
 - Duma, Eileen, 420
 - dusting, 489, 490
 - Duval, Catherine Rich, 94
 - Duxbury, Linda, 210–211
- E**
- EAD (Encoded Archival Description), 472
 - Eblin, Scott, 130
 - e-books, 458
 - EBP (evidence-based practice), 242–243
 - economic class, 369
 - economic trends, 40–41
 - Economist, The*
 - on corporate culture, 344
 - on hating your job, 532
 - on organizational structure, 132
 - economy
 - lack of job security and, 532
 - library budget and, 425–426
 - Edgar, William, 249
 - Eddie, John A., 450
 - Edwards, Brian, 499
 - EEO. *See* equal employment opportunity
 - effectiveness, 245
 - Elder, Stephen, 448
 - Elder, Victoria, 448
 - e-leadership
 - challenges of, 332–335
 - e-team issues, 335–336
 - electronic communication
 - e-mail, 194–195
 - guidelines for, 193
 - intranet, 193–194
 - social media, 195–196
 - Electronic Resource Management Initiative (ERMI), 471
 - Elway Research, 180
 - e-mail
 - as choice of communication channel, 192
 - guidance for communicating by, 194–195
 - e-leadership and, 332–335
 - Emberton, John, 464–465
 - emergency exits, 54, 492
 - emergency/disaster management, 495–499
 - emergent change, 215–216
 - Emery, Fred
 - on contingency theory, 20
 - on organizational environments, 37
 - on turbulent environment, 159
 - emotional intelligence (EI)
 - Alire's experience with, 328
 - employee motivation and, 292
 - of leaders, 328–330
 - emotions
 - anger, 60–62
 - communication process and, 185–186
 - and library disasters, 499
 - employee motivation
 - performance and, 291–293
 - personal in nature, 291
 - process theories, 298–306
 - public service motivation, 312–313
 - reinforcement theories, 306–311
 - team motivation, 311–312
 - employee-centered managers, 304–306
 - employees
 - authority and, 114–115
 - corrective action, 412–413
 - development/retention of, 407–408
 - grievances, 414–415
 - new employee, 405–406
 - performance appraisal, 408–411
 - progressive discipline, 413–414
 - unions/merit systems, 416–417
 - See also* staffing
 - employment
 - legal concerns in HR management, 390–393
 - U.S. legislation on, 392
 - See also* staffing
 - empowered teams, 344, 351–354

- Encoded Archival Description (EAD), 472
- energy saving, 499–500
- engineered standards, 255–256
- environment
- anti-environmental views, 43
 - centralization/decentralization of organization and, 151–152
 - of decision making, 158–159
 - diversity, hospitable working environment, 373–374
 - forecasting, 41–43
 - Joseph Mika's experience of, 47
 - organization and, 36–39
 - organizational structure, redesign of, 131–133
 - team environment, 350–351
 - See also* operating environment; physical facilities
- environmental scanning
- importance of, 39–40
 - organizational culture and, 43–45
 - variables for, 40–41
- Epp, Mary Anne, 67
- equal employment opportunity (EEO)
- legal issues, 391–392
 - merit system and, 416
- equilibrium, overcoming for change, 213–214
- equipment, 55
- “equitable” vs. “equal,” 519
- e-resources, 67
- ERG (Existence, Relatedness, and Growth)
- theory, 297
- ergonomics, 55, 462–463
- Erickson, Tamara J., 340
- ERMI (Electronic Resource Management Initiative), 471
- Ertel, Danny
- on negotiation, 75, 124
 - on team negotiation, 359
- Eshleman, Amy, 484
- Espinoza, Chip, 381
- esteem
- ethical behavior and, 524
 - needs, 295, 296, 297
- ethics
- access, 515, 519
 - ALA's Code of Ethics, 521
 - ALA's Freedom to Read Statement, 516–519
 - coworkers, 524–527
 - intellectual freedom, 519–521, 522–524
 - leader as example setter, 326
 - Library Bill of Rights, 520
 - management ethics, 511–512
 - privacy, 522–524
 - quotations on, 510
 - reasons ethics matter, 512–514
 - social responsibility and, 512
 - standards, values, codes, 514–515
- Euster, Joanne, 139
- Evaluation. *See* assessment
- Evans, G. Edward, 348, 409, 468
- Everett, Robert F., 94
- Every Child Ready to Read @ your library (ECRR) program, 485
- evidence-based practice (EBP), 242–243
- Ewing, Stacy, 340
- Existence, Relatedness, and Growth (ERG)
- theory, 297
- expectancy, 294, 298
- expenditures
- budget as control device, 426–428
 - budget cycle and, 429–430
 - in budget reports, 448
 - in line-item budget, 437–438
 - in operating expense budget, 435–436
 - in performance budget, 438–439
 - in program budget, 439–440
 - technology costs, controlling, 466–468
 - in zero-base budget, 440–441, 445
- experience, reinforcement theories, 306–311
- expert power, 112
- eXtensible Markup Language (XML), 473
- external audits, 446–447
- external team, 335–336
- eye contact, 201
- F**
- face-to-face communication
- body language, 200–201
 - lessening concern about, 179–180
- fair, meanings of, 185
- fair use
- copyright and library services, 76–77
 - DMCA and, 469
- Fairfax County Library, Fairfax, Virginia, 91–92
- Faith Center Church Evangelistic Ministries, 69
- Family Place Library, 485
- Farrugia, Sarah, 57
- Fayol, Henri, 13–14, 114
- fear, 217–218
- Fédération Internationale d'Information et de Documentation, 5
- feedback
- about communication needs, 188–189
 - in communication process, 182–183, 199–200

- for customer behavior analysis, 273–274
 - for library marketing, 268
 - marketing audit, 276–277
 - teams and, 349, 354, 357
 - fees, 449
 - Fels Institute of Government at the University of Pennsylvania, 242
 - Fernandez, Joe, 95
 - Fernandez, Peter, 71
 - Ferri-Reed, Jan, 310
 - Fiedler, Fred E., 322–323
 - fight, 159
 - Fillmore, Derek, 200–201
 - filtering
 - access to Internet, 475–476
 - CIPA filtering, 67–68
 - of communication, 198
 - Finch, Elsie, 283
 - fines, 449
 - fire code, 54
 - firewalls, 474
 - First Amendment, 520
 - first sale doctrine, 78
 - fiscal management. *See* money management
 - fiscal year, 429
 - Fisher, Anne, 393–394
 - Fisher, David, 223
 - Fiske, Marjorie, 522
 - Fitzgerald, Laurie A., 215
 - Flagstaff Public Library, 456, 457
 - flexibility
 - for diversity, 371
 - e-leadership and, 334
 - of library space, 484, 487, 501
 - of working practices, 540
 - flight, 158–159
 - flow charts, 256
 - Floyd, Steven W., 102
 - Flynn, Nancy L., 193
 - focus groups
 - for customer behavior analysis, 273
 - on organizational change, 217
 - resources on, 254
 - for user data collection, 253–254
 - Follett, Mary Parker, 6, 19
 - food, in library, 486
 - force-field analysis, 212–214
 - forecasting the environment, 41–43
 - formal organizations, 32–34
 - formula budget, 437
 - Forrest, Charles, 272
 - Forrester, Paul, 216
 - Foskett, Douglas J., 526
 - foundation, 450
 - Fox, Adrienne, 125
 - Franklin, Pat, 247
 - Freedom to Read Statement (ALA), 515, 516–519
 - freelance work, 540
 - frequency of use (equipment/process) option, 141
 - Freund, Dale, 418
 - “friends” groups, 450
 - Frisch, Bob, 169
 - FTE (full-time equivalent) position, 393–395
 - Fulmer, William E., 324
 - functional option, 139–140
 - fund accounting, 444–445
 - funding
 - accountability for use of, 237
 - budget as control device, 427
 - budget request, defending, 432–435
 - competition for resources, 33
 - environmental scanning variable, 40
 - income generation, 448–452
 - for new staff, 394
 - for nonprofit organizations, 34–36
 - securing, 425, 426
 - for technology, 457–458
 - fundraising
 - advice for, 450–453
 - quotations on, 424
 - resources on, 448
 - furniture, 55
 - future
 - adaptive leadership and, 324
 - forecasting the environment, 41–43
 - leaders of the future, 336–337
 - rational decision making and, 164
- G**
- Galbraith, Quinn, 227, 461
 - Gallo, Carmine, 227–228
 - game theory, 256–257
 - Gantt, Henry, 13
 - Garcia, Melissa, 211–212, 216
 - Garvin, David A., 161
 - Gellerman, Saul, 46, 410
 - Gellert, Charlotte, 117
 - Gen X, 379, 381
 - Gen Y, 379–380, 381
 - gender
 - differences in leadership, 331–332
 - diversity in, 369
 - staffing diversity, 371–372
 - general fund, 446

- general management journals, 27
- generations
- communication preferences of, 187–188, 189
 - diversity issues and, 378–381
 - generational diversity issues, 369
 - motivation and, 310
- Gianfranco, Faruggia, 35
- Giesecke, Joan, 100, 330
- gifts, 451–452, 525–526
- Gilbreth, Frank, 12
- Gilbreth, Lillian, 12, 15
- Glen, Paul, 121–122
- Glenn, David D., 50, 51
- Glor, Eleanor D., 30, 32
- goals
- after strategic plan, 88
 - in career-planning process, 534, 536
 - delegation to achieve, 133
 - job design and, 395–396
 - motivation and, 294
 - objectives and, 97
 - of organization, 32
 - organizational environment types and, 37–38
 - organizational restructuring and, 136
 - of performance appraisal, 409–411
 - in planning process, 95–96
 - team empowerment and, 353
 - technology planning and, 464–465
- Godfrey, A. Blanton, 249
- Godkin, Lynn, 331
- Goldsmith, Joan, 319, 328
- Goleman, Daniel
- on emotional intelligence, 328–329
 - on leadership, 329
- Gore, Daniel, 243
- governance
- diversity and, 375–376
 - overview of, 117–118
 - visible/invisible organization, 121–125
- Government Performance and Results Act of 1993, 237
- government regulations, 390
- Gow, Peter, 90
- Graen, George, 112
- Graham, Roderick, 191
- grants, 34–35, 451–452
- grassroots, 333
- Gratton, Lynda, 340
- Green, Catherine, 123
- Greene, Courtney, 476–477
- Greenleaf, Robert, 324
- Greenleaf Center for Servant-Leadership, 323
- Grenny, Joseph, 513
- grievances, 414–416
- Griffith, James, 200–201
- Griffiths, Peter, 468
- Grogg, Jill, 358–359
- Gross, Melissa, 101, 236
- group accountability, 357–358
- group decision making, 168–170, 309–310
- “groupthink,” 168–169
- Gruben, Karl, 72, 475–476
- Grugulis, Irena, 108
- Gulick, Luther, 8
- Guth, William, 166
- Guzzo, Richard, 143, 344
- H**
- Hackman, J. Richard, 143–144
- Haener, J. J., 290, 301
- Hage, Christine L., 458
- Halsted, Deborah, 498
- Hammill, Greg, 188
- Hammond, James, 278
- Hammond, John, 156, 158, 162
- Handy, Charles, 109
- Haras, Catherine, 238
- Harer, John B., 238
- Hariff, Subnum, 278
- Harris, Lesley Ellen, 472
- Harris, Martin, 39
- Hart, Christian L., 200–201
- Hartman, Taylor, 327
- Hartmann, Meg, 425
- Harvard Business School, 16, 89
- Harvey, Carl A., 285
- Hawker, Kate, 211–212, 216
- Hawthorne, Pat, 388, 393–394
- “Hawthorne Effect,” 16–17
- Hayashi, Alden M., 162
- Hayes, Robert M., 170
- hazardous material, 55–56
- Healey, Paul, 65–66
- health, 462–463
- legal issues, 54–57, 392–393
 - library housekeeping and, 489
- hearing impairment, 202
- Heath, Robert L., 283
- Heckscher, Charles, 342–343
- Heid, Greg, 482, 488
- Heinritz, Fred, 13
- Held, Greg, 482

- Helgesen, Sally, 331
- Henriksen, Missy, 489
- Hensiack, Kathryn, 333
- Hererra, Luis, 7
- Hernon, Peter
 - on assessment, 238, 253
 - on “Emotional Intelligence,” 329
 - on library directors, 322
- Herzberg, Frederick, 302–304
- hierarchy of needs, 295–297
- Higa, Mori Lou, 132–133
- Higgs, Malcolm, 215
- Hill, Nanci Milone, 117
- Hill, Terry, 94
- Hiller, Steve, 171
- Hiring. *See* recruitment; staffing
- Hodis, Flavia A., 527
- Hofstede, Geert, 368–369
- Hogan, Robert, 524
- Holley, Robert P., 543
- Holloway, Karen, 220
- Holt, Glen, 431–432, 451
- Holt, Leslie, 101, 236
- homeless people
 - disruptive user behavior in library, 58, 59
 - ethical treatment of, 526
 - security at library and, 494
- Hondeghem, Annie, 313
- Hopkins, Michael S.
 - on decisions, 156
 - on innovation, 210
 - on technology, 456, 457
- Horn, Anne, 171
- House, Robert J., 303
- housekeeping, library, 488–491
- Howell, Donna W., 118, 375
- HR. *See* human resources
- Huang, Samuel T., 431
- Hudson, Frederic, 329
- Hull, Raymond, 296
- human resources (HR)
 - final decision about new employee, 403–405
 - grievances, dealing with, 415
 - legal concerns in, 390–393
 - See also* staffing
- humidity
 - controlling, 491–492
 - and building sustainability, 499–500
- Hunt, Gary, 448
- Hunter, Judy, 132
- Hurley, Robert F., 134
- Hus, Julia, 71
- Huwe, Terence K., 463, 487
- HVAC (heating, ventilating, and air conditioning) system, 491–492
- I**
- ICT (information and communication technology)
 - collaboration for, 458, 479
 - costs of technology, controlling, 466–468
 - integration into library operations, 459
 - planning for, 464–466
- IFLA (International Federation of Library Associations and Institutions), 5
- Illife, Ursula, 71
- ILL (interlibrary loan), 77
- ILS. *See* integrated library system
- IMLS. *See* Institute of Museum and Library Services
- incentives, 294
- income generation
 - advice for, 448–452
 - resources on, 448
 - See also* fundraising
- individual responsibility, 372
- industry benchmarking, 251–252
- influence
 - definition of, 110
 - description of, 113–114
 - in organizational politics, 121–122
 - team creation and, 349
 - in transformational leadership, 323
- informal organizations, 32
- information and communication technology.
 - See* ICT
- information systems control, 473
- informational roles, 10–11
- injuries, legal issues, 54–57, 63–65
- innovation
 - libraries and, 223–227
 - techniques, 227–228
 - See also* change
- Innuzzi, Patricia, 248
- Institute of Medicine, 242
- Institute of Museum and Library Services (IMLS)
 - Chicago Public Library project, 484
 - on grant eligibility, 34–35
 - outcome-based evaluation and, 237
- insurance, 491
- integrated library system (ILS)
 - decision making, 171
 - development of, 459

- integrated library system (ILS) (cont.)
 privacy, usage of library resources and,
 475–476
 user privacy and, 70
- integrity, 349
- intellectual freedom
 ethics, 519–520, 522–523
 lawsuit against library involving, 68
- intellectual property (IP), 75–78
- intellectual security, 474–476
- interdependence, within organizations, 32
- interim solutions, 166
- interior designer, 502–503
- interlibrary loan (ILL), 77
- internal audits, 445–447
- internal benchmarking, 251–252
- internal marketing, 275–276
- internal team, 335–336
- international conference of educators, 5
- International Council on Archives, 5
- International Federation of Library Associations and Institutions (IFLA), 5
- Internet
 CIPA filtering, 67–68
 cloud computing, 476–477
 filtering, 475–476
 flexible working practices with, 539–540
- interpersonal roles, of manager, 10–11
- interpersonal space, 201
- interviews
 interviewees, suggestions for, 538
 with job applicant, 401–402
 for library job, 537–540
 for user data collection, 253
- intranet, 193–194
- intuition, 163
- invisible organization, 121–125
- IP (intellectual property), 75–78
- Ishikawa, Kaoru, 249
- issue-based strategic plan, 88–89
- J**
- Jaeger, Paul T., 50, 52, 67
- Jansen, Barbara A., 68
- Jardee, Thomas, 9
- jargon, 183, 201
- Jaskyte, Kristina, 208
- Jasper, Richard, 498
- Jassawalla, Avan, 45
- Jassin, Marjorie, 540
- Jefferson, Renée N., 527
- Jennings, Anna, 461
- Jennings, Eric, 280–281
- job characteristics, 397
- job depth, 396–397
- job descriptions
 in advertisement for job opening, 399
 overview of, 395–397
 for volunteers, 419
- job design, 395–397
- job satisfaction/dissatisfaction, 303–305
- job scope, 397
- job specifications (JS), 398
- job success criteria (JSC), 397, 401
- job titles, 533
- Jobs, Steve, 227–228
- Johannsen, Carl Gustav, 324
- Johansen, Bob, 42
- John Dana Cotton Awards, 281
- Johnson, Heather, 96, 394
- Johnson, Julie, 331
- Johnson, Margeaux, 340
- Johnston, Megan, 381
- Joiner, Brian L., 349–350
- Jones, Barbara S., 191
- Jones, Sherri, 250
- Jones, Virginia, 498
- Jordan, Mary Wilkins, 118
- journal subscriptions, 466
- journals, management, 27–28
- JS (job specifications), 398
- JSC (job success criteria), 397, 401
- judgment, 158
- Jue, Dean K., 171
- Juran, Joseph M.
 quality approach, 20, 21
 Six Sigma approach, 252
 as TQM writer, 249
- justice, 512
- K**
- Kacmar, K. Michele, 371–372
- Kadlec, Daniel, 417
- Kahai, Surinder, 335
- Kahn, Miriam, 494, 498
- Kalan, Abby Preschel, 340
- Kalia, Arvind, 42
- Kalonick, Jillian, 118
- Kant, Immanuel, 512
- Kanter, Rosabeth Moss, 111
- Kantian ethics, 512
- Kaplan, Robert S., 103, 252
- Kathman, Jane McGrun, 221
- Kathman, Michael D., 221

- Katz, Robert, 9
- Kayongo, Jessica, 250
- Kazlauskas, Edward, 225
- Keeney, Ralph
 on bad decisions, 162
 on decision making, 156, 158
- Kegan, Robert, 218
- Kell, Thomas, 44
- Kellerman, Barbara, 318, 320
- Kendall, Frances E., 374
- Kennedy, Marie, 262
- Kennedy, Marilyn Moats, 123
- Kennedy, Mary Lee, 210
- Kennedy, Mike, 490, 496
- Kepner, Charles H., 165, 166
- Keyes, Kris E., 498
- Kies, Cosette, 265
- Kihlstrom, John F., 330
- Kitzis, Ellen, 479
- Kniffel, Leonard, 366
- knowledge work, 343
- Koontz, Christie, 171
- Kotler, Philip
 definition of marketing, 268
 on media release, 281–282
 on social marketing, 270
 strategic marketing process, 271
 on user-oriented marketing, 268–269
- Kotter, John
 eight-stage change model of, 214–215
 on managers who use power successfully,
 112–113
 on managing resistance to change, 219
- Kramer, Steven, 310–311
- Kranich, Nancy, 50
- Krueger, Richard A., 254
- Kumi, Susan, 252
- Kyrillidou, Martha, 250
- L**
- labor issues, 40
- Ladhari, Riadh, 250
- LaFasto, Frank, 358
- Lahey, Lisa Laskow, 218
- Larsen, Karin, 90
- Larson, Carl, 358
- Latimer, Karen, 482
- Lawrence, Paul, 39
- laws
 importance of in library management,
 51–52
 legal concerns in HR management, 390–393
 library services and, 66–69
See also legal issues
- lawsuits, 415
- Lawton, Eunice, 200
- Leader Behavior Description Questionnaire,
 322
- leaders
 determination of, 121
 team environment and, 351
- leadership
 approaches to, 321–325
 definition of, 321
 e-leadership, 332–336
 emotional intelligence, 328–330
 functions of, 325–327
 for fundraising, 449
 gender differences in, 331–332
 leader/manager, differences in, 319–321
 leaders of the future, 336–337
 one-on-one learning, 330–331
 in organizational politics, 121–122
 quotations on, 318
 skills, development of, 326–328
- Leadership in Energy and Environmental
 Design (LEED) rating system, 500
- Leadership Learning Community, 326
- Lean Six Sigma method, 252
- learning
 lifelong learning by leaders, 327–328
 one-on-one learning, 330–331
- Learning Center, 327
- learning organization, 18
- learning organizations, 152–153
- Leavitt, William M., 388, 393
- Lee, Deborah, 272, 277–278
- Lee, Hwa-Wei, 448
- Lee, Terry W., 510, 513–514
- LEED (Leadership in Energy and Environmen-
 tal Design) rating system, 500
- Lee-Smeltzer, Kuang-Hwei, 383
- legal accountability, 116
- legal authority, 114
- legal issues
 contracts/licenses, 73–75
 copyright, 75–78
 of digital content, 469–471
 disruptive user behavior, 57–62
 of diversity, 371
 documentation, 78–79
 establishing a library, 52–54
 health/injury concerns, 54–57
 in HR management, 390–393

- legal issues (cont.)
 - laws/regulations, importance of in library management, 51–52
 - of library services, 66–69
 - malpractice, 65–66
 - negotiation, art of, 75
 - tort law, liability, 63–65
 - user privacy, 69–73
- legal policies
 - for disruptive user behavior, 58
 - environmental scanning variable, 40
- legislative accountability, 116
- legislative act, 52
- legitimacy, of communication, 204
- legitimate authority, 115
- legitimate power, 111
- Leher, Matthew, 452
- Lehmborg, Timm, 50, 51
- Leibold, Marius, 224
- Lencioni, Patrick, 137
- lending, 471
- Lepsinger, Richard, 108, 109
- Lerdal, Susan N., 171
- letters of recommendation, 403
- leveling, 198
- Leventhal, Richard, 265
- Levy, Piet, 94
- Lewin, Kurt, 212–214, 322
- Lewin's model of change, 212–214
- Lewis, Janice Steed, 241
- Lewis, Linda K., 498
- Lewis and Clark Library, 69
- LexisNexis, 71
- Li, Sali, 156
- liability
 - definition of, 63
 - librarian malpractice, 65–66
 - of online service provider, 77, 470
 - tort law and, 63–65
- Liberty Counsel, 68–69
- LibQUAL+, 249–250, 251
- libraries
 - advocacy of, 284–286
 - establishing, legal issues of, 52–54
 - library as place, 485–487
 - as nonprofit organizations, 34, 35–36
 - promotion of, 278–281
 - as public service organizations, 32
 - See also* physical facilities
- Library Bill of Rights, 520
- library boards
 - diversity and, 375–376
 - governance by, 117–119
- library design
 - evolution of, 483–484
 - library as place, 485–487
 - planning for new space, 500–505
 - for sustainability, 499–500
- library directors, 117–118
- library environment, 37–38
- library governance, 375–376
- library leaders, 324–325
- library management
 - journals, 27–28
 - laws/regulations and, 51–52
 - technology's role in, 458–460
- library marketing
 - to customers/community, 263
 - reasons for, 264–267
- Library of Congress, 459
- library services
 - copyright and, 76–78
 - law and, 66–69
 - legal issues of, 66–69
- library website
 - as promotion tool, 279
 - as public relations tool, 284
- licenses
 - for digital content, 470–471
 - library licensing agreement, legal issues of, 74–75
 - negotiation of, 75
- lifelong learning, 327–328
- Likert, Rensis, 305–306
- Lindblom, Charles, 4
- Line, Maurice, 87, 89
- linear programming, 172, 256
- Linehan, Margaret, 324–325
- line-item budget, 432, 437–438
- Linn, Mott, 424
- Lipinski, Tomas A., 472
- Lippitt, Ronald, 322
- listening, 180, 197–199
- Little, Felicia, 498
- Litwin, Rory, 71
- Liu, Mengxiang, 381–382
- lobbying, 263–264, 433–434
- Locke, Edwin A., 304, 305
- logo, 277–278
- Logo Design Services Directory, 278
- Long, Sarah, 2
- Longnecker, Clinton O., 290, 292
- Lorsch, Jay, 39
- loyalty, 407, 532
- Lubans, John, 344–345
- Ludwig, Logan, 100

lump sum budget, 437
 Luthans, Fred, 19
 Lynch, Beverly, 36

M

- MacArthur Foundation, 484
 Machiavelli, Niccolo, 210
 Mackenzie, Maureen L., 3, 5
 Magi, Trina, 70–71
 Maguire, Carmel, 225
 Mahoney, Thomas, 9
 maintenance projects, deferred, 496–497
 Malenfant, Kara J., 30, 84
 Malgeri, Jack, 41
 malpractice, 65–66
 management
 concepts of, 11–21
 definition of, 6–8
 functions/behaviors of managers, 8–10
 need for management education, 3–6
 organizational skill sets, 10–11
 of physical library, 488–495
 style, development of, 22–23
 management concepts
 administrative approach, 13–15
 behavioral approach, 15–16
 composite approaches, 21
 contingency theory, 19–20
 management science/quantitative approach,
 17–18
 overview of, 11–12
 quality approach, 20–21
 scientific management, 12–13
 systems approach, 18–19
 management education
 development of management course at
 UCLA library school, 7
 need for, 3–6
 management ethics, 511–512
 management journals, 23, 27–28
 management science/quantitative approach,
 17–18
 management style
 Advisory Board Experience, 24
 Authors' Experience, 23
 continuum of management styles, 304–305
 development of, 22–23
 managerial power, 111–112
 managerial responsibility, 371–372
 managers
 assessment by, 236
 authority of, 114–115
 budget preparation, 430–432
 centralization/decentralization of organiza-
 tion and, 150–152
 communication, importance of, 179–181
 communication, organizational barriers
 to, 187
 communication channels/direction,
 202–204
 communication needs, 188–189
 communication process, 181–186
 conflict, dealing with, 33–34
 decision making, 157
 digital content, management of, 469–473
 diversity, managerial responsibility, 371–372
 diversity, planning for, 373–375
 diversity challenges for, 365–367
 electronic communication, 193–199
 environment changes, dealing with, 38–39
 ethical coworker behavior, 524–527
 function of, 6–8
 functions/behaviors of, 8–10
 internal marketing to, 275–276
 leader/manager, differences in, 319–321
 learning organizations and, 152–153
 listening by, 197–200
 management ethics and, 511–512
 managerial power, sources of, 111–112
 motivation, performance and, 291–293
 motivation, process theories of, 298–306
 motivation, reinforcement theories on,
 306–311
 oral communication, 196–197
 organizational communication, principles
 of effective, 189–192
 organizational skill sets, 10–11
 planning, responsibility for, 102
 power, successful use of, 112–113
 power sanctions of, 110
 power/accountability/responsibility and,
 110
 problem solving by, 164–166
 quality control and, 254–258
 solutions, types of, 166–167
 span of control, 149–150
 style, development of, 22–23
 team building, 341–342
 team environment and, 351
 visible/invisible organization, 121–125
 written communication, 192–193
 Managing and Leading Libraries in a Political
 Context course, 36
 managing by results, 308–309
 man–machine charts, 256
 Mann, Floyd C., 306

- Mannering, Karen, 62
 Manning, Tracey T., 331
 Mantere, Saku, 102
 Manville, Brook, 146, 310
 MARC (Machine Readable Cataloging) standard, 246
 March, James G., 17
 Marchant, Maurice, 309
 Marchionini, Gary, 482
 Marek, Kate, 217, 222
 market analysis, 269
 market intelligence, 270
 market segmenting
 - customer behavior analysis, 273–274
 - resources on, 272
 - senior managers and, 274
 - target group definition, 271–272
 marketing
 - branding, 277–278
 - definition of, 263
 - internal marketing, 275–276
 - library marketing, reasons for, 264–267
 - marketing audit, 276–277
 - process of, 271–275
 - promotion, 278–281
 - public relations, 281–284
 - quotations on, 262
 - views of, 267–270
 - yourself, 536–540
 marketing audit, 276–277
 marketing process
 - customer behavior analysis, 273–274
 - differential advantages analysis, 274–275
 - differential marketing analysis, 273
 - generic product definition, 271
 - target group definition, 271–272
 Markins, Michael, 103
 Marques, Joan F., 178
 Marshall, Joanne Gard, 533
 Marston, William M., 419
 Martin, Ann M., 503
 Martins, E. C., 225
 Maslow, Abraham, 293, 295–297
 Mason, Karen M., 384
 Masuda, Aline D., 524
 materials budget, 435
 matrix approach, 141–142
 matrix organization, 143
 Matthews, Gerald, 328
 Matthews, Joseph R., 468
 Maxfield, David, 513
 Maxwell, John C.
 - on communication, 178, 179
 - on staff development program principles, 348–349
 May, Ruth, 42
 Maycock, Angela, 70
 Mayer, John
 - on emotional intelligence, 292, 328–329
 Mayo, Elton, 16–17
 McClelland, David, 297–298
 McDaniel, Carl D., 279, 280
 McDowell, Amy M., 388, 393
 McFarland, Shannon, 535
 McGrath, J. E., 222
 McGregor, Douglas, 299–301
 McKee, Annie, 222, 542
 McLaughlin, Michael W., 211
 McMenemy, David, 510
 McMillan, Ron, 513
 McNamara, Carter, 88–89
 McNeal, James U., 265
 McWilliam, Carol L., 217
 Mealia, Laird, 358
 Mechanic, David, 113
 mechanistic systems, 39
 Media, Francis, 210
 media release, 281–282
 Meehan, Sean, 273–274
 memos, 192–193
 men
 - gender differences in leadership, 331–332
 - staffing practices, gender diversity, 371–372
 mental ability, 328
 mental models, 152
 mentoring
 - in career-planning process, 534–535, 543
 - by leader, 329
 Meraz, Gloria, 433
 merit systems, 416–417
 message
 - in communication process, 181–186
 - listening to communication, 197–199
 Meyer, David G., 162
 Mika, Joseph
 - assessment tools for management course, 327
 - management style of, 8, 24
 - “Mika Missives,” 203
 - on mission statements, 90
 - on responsibility/accountability, 120
 - on taking management course, 5
 Miles, Raymond, 87–88
 Milgram, Stanley, 513
 Mill, John Stuart, 512
 Millard, John, 532

- Millennials, 246, 310
 Miller, Corey E., 409
 Miller, David C., 118
 Miller, Joanne C., 331
 Miller, Jon, 278
 Miller, Tamara, 373
 Mills, John, 330
 minimum wage, 392
 Mintzberg, Henry
 composite approach of, 21
 on decision making, 158
 on managerial behavior/functions, 9
 organizational skill sets, 10–11
 on poor management education, 2, 3
 on strategic planning, 103
 miscommunication, 186
 mission
 of team, 145
 technology planning and, 464–465
 mission statement
 example of, 93
 as key element in strategic plan, 88
 overview of, 89–92
 Mitchell, Geanna W.
 importance of people skills, 3
 on preparation for tomorrow's workforce, 2
 on staffing, 388
 modeling, by leader, 329
 Moe, Tricia, 540
 money management
 audits/auditors, 445–447
 budget as control device, 426–428
 budget cycle, 429–430
 budget formats, 437–444
 budget preparation, 430–432
 budget reports, 448
 budget request, defending, 432–435
 budget types, 435–436
 fund accounting, 444–445
 income generation, 448–452
 overview of, 425–426
 quotations on, 424
 monitoring
 of diversity performance, 374
 of teams, 355
 Moniz, Richard, 178, 179
 Montana State Library, 69
 Monte Carlo method, 172, 256–257
 Montgomery, Jack G., 378
 Moore, Mary Y., 118
 Moorman, John, 284, 503
 morale, 355–356
 Morales, Miguel, 250
 Moran, John, 217
 Morrow, John, 252
 Mosley, Pixey Anne, 379
 motivation
 behavior and, 293–294
 content theories, 295–298
 definition of, 291
 generational differences in, 380–381
 job satisfaction, 302–306
 performance and, 291–293
 process theories, 298–306
 public service motivation, 312–313
 quotations on, 290
 reinforcement theories, 306–311
 of teams, 311–312, 355
 theories, 294–311
 of volunteers, 419
 Motorola, 252
 Moyer, L. S., 431
 Muir, David, 278
 Mullins, John, 324–325
 multicasting, 461
 Munde, Gail, 381, 505
 Munduate, Lourdes, 210
 Munsterberg, Hugo, 15
 Murley, Diane, 67
 Murphy, Sarah, 252
 mushroom effect, 415
- N**
- Naglewski, Ken, 160
 Nanus, Burt, 92–93
 National Association of College and University
 Business Officers, 251–252
 National Information Standards Organization
 (NISO), 247, 472
 National PTA, 263–264
 National Security Letters (NSLs), 72
 Neal, Jim, 424, 448
 Neal, Kathryn M., 384
 needs
 acquired needs theory, 297–298
 communication, 188–189
 in ERG theory, 297
 hierarchy of, 293–297
 staffing needs, determination of, 393–395
 Neely, Teresa Y., 383, 539
 negative reinforcement, 307–308
 negligence, 63–65
 negotiation
 art of, 75
 requirements for, 124
 in teams, 358–359

- Nelson, Bob, 352
networking, 535
New York State's Interstate Library Compact, 53–54
newspapers, 280
Nicholson, Scott, 171
Nikolaou, Ioannis, 222
NISO (National Information Standards Organization), 247, 472
Nohria, Nitin, 86
noise factors, 182, 183
nonprofit marketing, 269–270
nonprofit organizations
 fund accounting, 444–445
 mission statements of, 90
 overview of, 34–36
nonprogrammed decisions, 159, 161
nonuser, library, 266–267
nonverbal communication
 body language, 199–202
 of job applicant in interview, 402
 resources on, 200
Nooraie, Mahmood, 164
normative ethics, 512
Normore, Anthony H., 331
Norton, David P., 103, 252
Novacek, Jill, 524
NSLs (National Security Letters), 72
- O**
- Ober, Josiah, 146, 310
objectives, 88, 96–97
Occupational Safety and Health Administration (OSHA), 392
OCLC (Online Computer Library Center)
 DCMI standard, 247
 WorldShare Management Services, 477
O'Connell, Andrew, 158
O'Connor, Matthew, 311–312
O'Connor, Steve, 100
Oder, N., 505
OE. *See* operating expense
office politics
 acquisition of power/authority, 109
 visible/invisible organization, 121–125
Ohio State University, 322
O'Keefe, Claudia, 282
Olins, Wally, 278
Olver, Lynne, 3
Omachonu, Vincent, 343
Omega, 78
O'Neill, Robert, 494
one-on-one learning, 330–331
online service provider (OSP), 77, 470
OpenURL, 472
operant conditioning, 306–308
operating budget, 428
operating environment
 anti-environmental views, 43
 change and, 209–210
 environmental scanning, 39–41
 environment/organization, 36–39
 forecasting, 41–43
 formal organizations, 32–34
 nonprofit organizations, 34–36
 organizational culture, 43–45
 organizational culture, Authors' Experience, 46
 organizational culture, learning, 45
 organizational structure, redesign of, 131–133
 organizations, pervasiveness of, 31–32
 people-friendly organizations, 46–47
 quotations on, 30
 situational approach to leadership, 322–323
 See also physical facilities
operating expense (OE)
 categories of expenditures in, 435–436
 as primary budget, 435
operational plans
 definition of, 88
 setting goals, 95–96
operations management
 assessment, quality control, and, 235–236
 assessment and accountability, 236–237
 assessment tools, 245–253
 performance analysis, 237–243
 quality, defining/measuring, 243–245
 quality control, 254–258
 user data collecting methods, 253–254
Oppenheim, Charles, 71
opportunity, 512
oral communication, 196–197
Oreg, Shaul, 213, 219
O'Reilly, Charles, 225
organic plan, 89
organic systems, 39
organizational behavior modification, 306–308
organizational change
 change process models, 211–217
 implementing, 220–221
 innovation and libraries, 223–227
 innovation techniques, 227–228
 resistance to, 217–220

- resources on, 222
 - stress and, 221–223
 - organizational communication
 - barriers to, 187
 - principles of effective, 189–191
 - readability of, 192–193
 - organizational culture
 - Authors' Experience, 46
 - impact on view of workplace, 31
 - learning, 45
 - overview of, 43–45
 - people-friendly organizations, 46–47
 - role in organizational innovation, 226
 - organizational development (OD), 220–221
 - organizational power, 111
 - organizational skill sets, 10–11
 - organizational structure
 - centralization/decentralization, 150–152
 - change to, 211–212
 - changes in, 131–133
 - committees, 147–149
 - communication barriers, 187
 - creating/restructuring, 136–138
 - delegation options, 138–144
 - resources on, 139
 - teams, 143–147
 - organizations
 - anti-environmental views, 43
 - change, nature of, 210–212
 - change, resistance to, 217–220
 - change process models, 211–217
 - change/innovation and, 209–210
 - changes to library organizational structure, 211–212
 - collaborative communities, 342–343
 - decision making by, 17
 - environment and the organization, 36–39
 - environmental scanning, 39–41
 - forecasting the environment, 41–43
 - formal organizations, 32–34
 - goals of, 395–396
 - nonprofit organizations, 34–36
 - organizational culture, 43–46
 - pervasiveness of, 31–32
 - pyramid shape of, 6
 - quotations on, 30
 - stress and, 221–223
 - team empowerment, barriers to, 352
 - teams, issues with, 345–347
 - teams, role of, 341–342
 - visible/invisible organization, 121–125
 - orientation, for new employee, 405–406
 - originated policy, 97
 - Orr, Richard, 243
 - OSHA (Occupational Safety and Health Administration), 51, 54–57, 392
 - Outcome-Based Planning and Evaluation Model, 101
 - outcomes assessment, 236, 238–239
 - output, 32
 - outsourcing, 468
 - oversight bodies, 118
 - ownership, of digital content, 470
- P**
- Padfield, Tim, 472
 - Page, Daniel, 200
 - Pantry, Sheila, 468
 - paraphrasing, 60, 61
 - parent organizational environment, 37
 - Parham, Loretta, 367
 - Parker, Jon C., 264
 - Parker, Richard, 264
 - Parks, Judi McLean, 173
 - participative management, 309–310
 - partnerships, 451
 - patrons. *See* users
 - Patterson, Kerry, 513
 - Payne, David, 221
 - Paynet, Richard P., 488
 - Payton, William, 491
 - Pease, Allan, 200
 - Pease, Barbara, 200
 - Peer, Jean, 513
 - Pember, Margaret, 248
 - people-friendly organizations, 46–47
 - performance
 - analysis, reasons for, 237–243
 - corrective action, 412–413
 - motivation and, 291–293
 - problem solving and, 165
 - progressive discipline, 413–414
 - quality control, 254–258
 - reinforcement theories, 306–311
 - rewards for, 303–305
 - staff performance appraisal, 408–411
 - stress and, 222, 223
 - of teams, 311–312, 342, 346
 - performance budget, 438–439
 - performance counseling, 412–413
 - performance rights, 76–77
 - Perry, James L., 312, 313
 - Persistent Uniform Resource Locator (PURL), 472

- personal injury, 63–65
- personal mastery, 152–153
- personality
 - in Argyris continuum, 301–302
 - four basic types, 419
 - of team members, 347–348
 - team selection factor, 350
 - trait approach to leadership, 322
- personnel budget, 435
- persuasion, 192–193
- PEST (political, economic, social, and technological) analysis, 94
- Peter, Laurence, 296
- Peter Principle, 296
- Pfeffer, Jeffrey
 - on evidenced-based management,” 170
 - on power, 108, 113, 122–123
- Phipps, Shelley E.
 - on evaluation of teams, 358
 - on University of Arizona Library, 221, 359
- photocopying, 77
- phrases, 199
- physical facilities
 - access issues, 66–67
 - emergency/disaster management, 495–499
 - evolution of, 483–484
 - library as place, 485–487
 - managing, 488–495
 - moving to new location, 505
 - organizational restructuring and, 137
 - planning for new space, 500–505
 - quotations on, 482
 - sustainability of, 499–500
 - technological security, 473–474
 - See also* libraries
- physiological needs, 295–296
- Pike, George, 72
- Pintozzi, Chestalene, 146
- PLA (Public Library Association), 485
- placid-clustered environment, 37
- placid-randomized environment, 37
- planned giving, 450, 452
- planning
 - budget preparation, 430–432
 - for career, 531–532
 - career-planning process, 533–536
 - delegation and, 131
 - for diversity, 373–375
 - for fundraising, 449
 - for job interview, 401
 - for new library space, 500–505
 - in project life cycle, 101
 - staffing needs, determination of, 393–395
 - for team building, 345
 - for teams, 345
 - for technology, 464–466
- planning process
 - goals, 95–96
 - importance of, 85–87
 - nature of planning, 87–88
 - objectives, 96–97
 - policies, 97–98
 - procedures, 98–99
 - programs, 99
 - project management, 101
 - quotations on, 84
 - scenario planning, 99–100
 - strategic planning, 88–95
 - value of planning, 103
 - who should plan, 102–103
- PLR (public lending right), 78
- policies
 - advocacy as attempt to influence, 263
 - definition of, 97
 - for disruptive user behavior, 58
 - planning process, 97–98
 - types of, 97–98
 - for unattended children at library, 64–65
 - for user privacy, 69–70, 72
- political, economic, social, and technological (PEST) analysis, 94
- politics
 - accountability, 116
 - authority, 114–115
 - of budgeting, 432–435
 - of elections/political beliefs, 125
 - environmental scanning variable, 41
 - governance, 117–118
 - influence, 113–114
 - library involvement in, 36
 - political roles of manager, 10–11
 - power, 110–113
 - power, accountability, responsibility and, 109–110
 - responsibility, 118–120
 - status, 120–121
 - technology politics, 479
 - visible/invisible organization, 121–125
- Pollock, Ted, 138
- Pomerantz, Jeffrey, 482
- Pors, Niels Ole, 324
- Porter, Christopher D., 173
- POSDCoRB functions, 8–9
- positive reinforcement, 307
- Posner, Barry Z., 511
- Powell, Ronald, 322

- Powelson, Susan, 503
- power
 - accountability/responsibility and, 109–110
 - in acquired needs theory, 297–298
 - definition of, 110
 - leadership theories and, 322–323
 - managers' successful use of, 112–113
 - quotations on, 108
 - sources of, 111–112
 - status and, 120
 - visible/invisible organization, 121–125
- premises, library, 63
- press release, 281–282
- Pressley, Lauren, 195
- Presthus, R. V., 114, 115
- preventive solutions, 166
- Price, Lee, 84
- Priem, Richard, 156
- primary liability, 63
- print materials, 67, 484
- privacy
 - ethics, 522–524
 - intellectual security, 474–476
 - user privacy, legal issues of, 69–73
- problem solving
 - rational decision making and, 164–166
 - solutions, types of, 166–167
- process theories
 - Argyris continuum, 301–302
 - expectancy, 298
 - Frederick Herzberg's theory, 302–305
 - function of, 294
 - Likert's continuum of management styles, 304–306
 - motivation, 298–306
 - Theory X/Theory Y, 299–301
 - Theory Z, 301
 - valence, 298
- processing controls, 473
- product
 - delegation option, 140–141
 - differential marketing analysis, 273
 - generic product definition, 271
- production-centered managers, 304–306
- professional associations, 372–373
- professional development, 534, 536
- Proffitt, Marrilee, 208
- program budgets, 439–440
- programmed decisions, 159
- progressive discipline, 413–414
- project management, 101
- project teams, 344
- promotion
 - definition of, 264
 - of librarian in academic library, 532
 - overview of, 278–281
- Prusak, Laurence, 342–343
- PSM (public service motivation), 312–313
- PSOs (public service organizations), 32
- psychology, 15–16
- public lending right (PLR), 78
- public libraries
 - designated room/care of children, 65
 - disruptive user behavior, 57–62
 - establishment of through legislative act, 52
- Public Library Association (PLA), 485
- Public Library Geographical Database, 171–172
- public relations
 - definition of, 264
 - description of, 281
 - library website for, 284
 - media release, 281–282
 - public relations advisors, 282–283
 - timing of, 282
- public relations advisors, 281–283
- Public Relations Society of America, 281
- public service motivation (PSM), 312–313
- public service organizations (PSOs), 32
- publicity, 281–284
- Pulley, Mary Lynn, 332–334
- punishment, 307–308
- PURL (Persistent Uniform Resource Locator), 472
- Q**
- qualitative techniques, 170–172, 173–174
- quality
 - interpretations of, 244–245
 - questions for, 243–244
 - of service, millennials and, 246
 - user data collecting methods, 253–254
- quality approach, 19–21
- quality control
 - analysis, types of, 255–258
 - assessment tools, 245–253
 - importance of, 235
 - standards for, 254–255
- Qualk, James, 499
- Qualman, Erik, 478
- quantitative approach
 - best-known individuals in, 17–18
 - for decision making, 170–173
- Queen, Patrick, 252
- Quesada, Todd Douglas, 366, 367
- questions
 - on job application, 399–400

- questions (cont.)
 for job interview, 401–402, 539–540
 for mission statement, 91
 for planning, 85–86
 for technology planning, 465–466
 for vision statement, 93
- queuing theory
 for quality control, 256
 for quantitative decision making, 172
- Quick, James, 222
- Quinney, Kayla L., 461
- R**
- race, employment legislation and, 391–393
- racism, 374
- radical change, 210–211
- radio frequency identification (RFID) technology, 72–73
- Raiffa, Howard
 on bad decisions, 162
 on decision making, 156, 158
- Rampart Library District, Colorado Springs, Colorado, 68–69
- Rangan, V. Kasturi, 90
- ranking systems, 410
- Raphael, Molly, 108, 109
- Rashid, Md Zabid Abdul, 30
- Raskin, Robert, 524
- Ratcliffe, John, 84
- rating systems, 410–411
- rational decision making
 assumptions of, 163–164
 problem solving and, 164–166
- recovery plan, for disasters, 497–498
- recruitment
 application forms, 399–400
 cover letters, statements of interest, 400
 final decision, 403–405
 interviews, 401–403
 process of, 399
 of staff, diversity and, 376–378
 tests, 400–401
 verification/evaluation, 403
- Redfern, Bernice, 381–382
- Reed, Sally Gardner, 118, 420
- referent power, 111
- reflexive style, 163
- refreezing, 213
- regulations, 51–52
See also legal issues
- Rehm, Georg, 50, 51
- reinforcement theories
 Athenian model of motivation, 310
 function of, 294
 generational differences in motivation, 310
 manager survey, 310–311
 motivation, 306–311
 operant conditioning, 306–308
 participative management, 309–310
- relationships
 communication barriers and, 187
 in contingency theory of leadership, 322–323
 between library boards/library directors, 118
 library budget advocacy and, 434
 organizational politics and, 122, 123
 public relations for building, 281
 with social media, 477–478
- religious beliefs, 378
- religious groups, 68–69
- remote access, 459–461
- reports, budget, 448
- respect, 114
- responsibility
 accountability vs., 118–120
 delegation of, trust for, 134–136
 diversity and, 371–372
 organizational restructuring and, 136–138
 power/accountability and, 108, 109–110
 visible/invisible organization, 121–125
- résumé, 536–537
- retention
 of staff, 407–408
 of staff, salaries and, 426
 of volunteers, 417–419
- retirement, 393–394
- Rettig, Jim, 456, 460
- return on investment (ROI)
 funders want evidence of, 237
 generation of evidence of, 241–242
 library marketing and, 264–265
- review
 of marketing material, 275
 of written communication, 202
- reward power, 111
- rewards
 for performance, 303–304
 for positive reinforcement, 307
 team accountability and, 357–358
 for team performance, 346, 351
- RFID (radio frequency identification) technology, 72–73
- Ribbens, Geof, 200
- Richer, Lisa, 330
- Riley, Ann, 222

- risk
 of decision making, 158–159, 167
 planning and, 87–88
 tolerance, decision-making styles and,
 161–163
 risk management, 491
 Rivard, Suzanne, 468
 Roberto, Michael A., 161
 Roberts, Ken, 318
 Roberts, Richard A.
 on change, 208, 209
 on emotional intelligence, 328
 Robinson, Charles W., 118
 Robinson, Simon, 119
 Rogers, Paul, 156, 161
 ROI. *See* return on investment
 role ambiguity, 133
 roles, 10–11
 rolling plan, 464
 Romeo, Jim, 96
 Rooks, Dana C., 318, 320
 room usage policy, 68–69
 Roper, Kathy O., 488
 Roser, Missy, 477
 Rossiter, Nancy, 329
 Rowland, Deborah, 215
 Rowley, Jennifer
 on library marketing, 264, 265
 on innovation strategy, 224
 on U.K. public library branding, 278
 Royle, Molly, 373
 Ruane, Elizabeth, 476–477
 Rugaas, Benedik, 411
 Ruhlmann, Ellyn, 268
 rules, 59
 Rush, Graig, 381
 Russell, Carrie, 472
 Rutherford, Sarah, 30, 44
- S**
- safety
 disruptive user behavior, 57–62
 emergency/disaster management, 495–499
 legal issues, health/injury concerns, 54–57
 legal issues of HR management, 392–393
 of library facility, 488
 library housekeeping issues, 489, 491–493
 library liability and, 63–65
 risk management for library facility, 491
 Sager, Donald, 300–301
 salary
 costs, controlling, 466
 compression, 404
 funds for in budget, 435–436
 librarian career, plan for, 531, 532
 library budget and, 426
 for new employee, 404
 sales promotion, 279
 Salovey, Peter, 292, 328
 San Francisco Public Library System, 59
 San José State University, 381–382
 sanctions
 imposed on power by staff, 111
 of manager, 110
 for violation of code of ethics, 513
 Sandlian-Smith, Pam, 482, 484
 Santa Clara County (Los Gatos, CA) library, 72
 Saponaro, Margaret, 469
 Sashittal, Hemet, 45
 satisfaction, 303–305
 Saurin, Ruth, 84
 Savard, Rejean, 265
 scale, of change, 217
 scanning, environmental, 39–41
 scenario planning, 99–100
 scenario plans, 89
 Schein, Edgar, 44
 Schlesinger, Leonard, 219
 Schlipf, Fred, 505
 Schmid, Torsten, 102
 Schmidt, Warren H., 511
 Scholtes, Peter R., 349–350
 school libraries
 disruptive user behavior, 57
 establishment of library through legislative
 act, 52
 Schosser, Melanie, 102–103
 Schuman, Pat, 262, 284
 Schwartz, Candy, 238
 Schwarz, Jan, 38
 scientific management, 12–13
 Seattle Public Library, 504
 secondary liability, 63
 security
 crime prevention, 493–494
 emergency/disaster management, 495–499
 intellectual security, 474–476
 library housekeeping issues, 491–493
 needs, 295, 296
 system for library, 492–493
 technological security, 473–474
 Seer, Gitelle, 431, 432
 selection instruments, 398–399
 Self, James, 171, 252–253
 self-actualization needs, 295, 296, 297
 self-assessment, 533

- self-censorship, 522–523
- self-interest, 524–527
- self-managed teams, 144
- Selye, Hans, 221
- Senge, Peter M.
 - on learning organizations, 152–153
 - systems approach, contributions of, 18–19
- SengYap, Ching, 30
- Senior, Barbara, 215
- senior managers
 - budget preparation by, 430–432
 - functions/behaviors of, 9
 - library space and, 487
 - organizational barriers to team empowerment, 352, 353
- servant-leadership, 323, 324
- servers, 459–460
- service intangibility, 248
- service orientation, 389
- Sessa, Valerie, 332–334
- SFX, 472
- Shank, John, 461
- Shapira, Ian, 364
- shared visions, 152
- sharing, 7–8
- sharpening, 198
- Shaughnessy, Thomas, 139, 248
- Shaw, Ralph R., 234
- Sheffer, Carol, 130
- Sherman, Amy, 452
- Sherman, Harvey, 138
- Shetach, Ana, 168
- Shontz, Marilyn, 264
- Shurygailo, Stan, 335
- Sidorko, Peter, 100
- signs, as marketing tool, 280
- Silverman, Emily, 424
- Simmers, Claire, 193
- Simmons, J. K., 462
- Simon, Herbert
 - on behavior/decision making, 157
 - on quantitative approach, 17
 - on rational decision making, 163
- Simons, Robert, 84, 85
- Simons, Spencer L., 50, 57
- Simpson, Carol, 77
- simulation modeling, 172
- Singh, Rajesh, 262
- Sinwell, Carol
 - on communication, 181, 186
 - on delegation, 133
 - on library liability, 64
 - management style of, 24
- site budgets, 437
- situational approach to leadership, 322–323
- Six Sigma approach, 252
- size
 - of formal organizations, 32
 - of team, 350
- skills
 - career-planning process and, 533
 - of leadership, development of, 326–328
 - librarian career plan and, 532
 - team selection factor, 350
- Skinner, B. F., 306
- Skinner, Leane B.
 - importance of people skills, 3
 - on preparation for tomorrow's workforce, 2
 - on staffing, 388
- Skot-Hansen, D., 369
- SMARTER goals, 96
- SMARTER objectives, 97
- Smith, G. Stevenson, 445, 448
- Smith, Sara D., 227, 461
- Smith-Butler, Lisa, 264
- Snow, Charles C., 87–88
- Snowden, David, 159
- social contract ethics, 512
- social marketing, 269–270
- social media
 - for career networking, 535
 - for communication, 195–196
 - library use of, 477–478
- social needs, 295, 296
- social responsibility, 511, 512
- social space, 486–487
- socialization, 114–115
- sociocultural factors, 41
- Solomon, Laura, 478
- solutions, 164–167
- Sottong, Stephen, 458
- source, 181–186
- span of control, delegation, 149–150
- special-revenue fund, 446
- Speich, Daniel, 167
- stability, 334
- staff
 - advocacy by, 284–285
 - change, resistance to, 217–220
 - change process models and, 212–217
 - committees, 147–149
 - communication, managerial, 191–192
 - communication, organizational barriers to, 187
 - communication needs, 188–189
 - corrective action, 412–413

- decentralization and, 152
 - delegation of responsibilities, trust and, 134–136
 - delegation options, 138–143
 - disruptive user behavior, 57–62
 - diversity, individual responsibility for, 372
 - electronic communication and, 193–196
 - emergency/disaster management and, 495, 498–499
 - emotional state of, 185–186
 - ethical coworker behavior, 524–527
 - feedback for customer behavior analysis, 273–274
 - generational differences, diversity issues, 378–381
 - grievances, 414–415
 - housekeeping responsibilities, 488–490
 - innovation and, 224–225
 - internal marketing, 275–276
 - library assessment for, 238–239
 - for marketing program, 275
 - motivation, performance and, 291–293
 - moving to new location, 504–505
 - organizational change and, 210–212
 - organizational politics and, 126
 - organizational restructuring and, 136–138
 - performance appraisal, 408–411
 - planning, participation in, 102–103
 - power sanctions of, 111
 - progressive discipline, 413–414
 - redesign of organizational structure and, 133
 - roles/responsibilities, division of, 119
 - security at library and, 493–494
 - span of control and, 149–150
 - status of, 120–121
 - stress and the organization, 221–223
 - subordinate's informal power, 113
 - teams, 143–147
 - technology background/training, 460–464
 - technology resistance of, 461–462
 - technostress of, 462–463
 - unions/merit systems, 416–417
 - visible/invisible organization, 121–125
 - volunteers and, 419–420
- staff memo, 184, 185
- staffing
- corrective action, 412–413
 - developing/retaining staff, 407–408
 - diversity, managerial responsibility, 371–372
 - diversity and, 376–378
 - grievances, 414–415
 - job design/descriptions, 395–397
 - job specifications, 398
 - job success criteria, 397
 - legal concerns in HR management, 390–393
 - needs, determination of, 393–395
 - new employee, 405–406
 - people, importance of hiring right, 389
 - performance appraisal, 408–411
 - process, 395–399
 - progressive discipline, 413–414
 - quotations on, 388
 - recruitment, 399–405
 - selection instruments, 398–399
 - steps of, 390
 - unions/merit systems, 416–417
 - volunteers, 417–420
- stakeholders, 238–243
- Staley, David J., 30, 84
- Stalker, George M., 20, 39
- standards
- for assessment, 246–249
 - for ethics, 514–515
 - for quality control, 254–256
- Standards for Libraries in Higher Education* (ACRL), 246–247, 248, 514–515
- Standards for the 21st-Century Learner* (AASL), 247
- Starbucks, in library, 486
- statements of interest, 400
- status, of library staff, 120–121
- Steele, Richard, 103
- Stephens, Clara Gatrell, 247
- Stephens, Julia, 366, 367
- Stephens, Michael, 195
- Stewart, Thomas A., 87
- Stewart, Wayne, 42
- Stoffel, John D., 41
- Stoffle, Carla J., 359
- storage control, 474
- strategic goal
- objectives and, 97
 - setting, 95–96
- strategic management, 88
- strategic marketing
- description of, 269
 - process of, 271–275
- strategic planning
- data gathering example, 91–92
 - definition of, 88
 - mission statements, 89–92
 - model, 96
 - models of, 88–89
 - questions about, 103
 - SWOT analysis, 94–95

strategic planning (cont.)
 value statements, 95
 vision statements, 92–94
 strategic plans, 88
 strategy, 88
 Streb, Christoph K., 224
 stress
 from disaster, 495
 technostress, 462–463
 work/life debate, 541–542
 workplace stress, 221–223
 Stribel, Barbara J., 349–350
 Strong, Gary E., 130
 Sturgess, Paul, 71
 Suarez, Doug, 243
 success, 542–543
 Sujansky, Joanne, 310
 Sumanth, David, 343
 Sun-Tzu, 39–40
 suppliers, 40
 support group, 450
 surveys, 91, 253
 sustainability, of library building, 499–500
 Sutton, Robert, 171
 Sverdlik, Noga, 213, 219
 Sweeney, Richard, 380
 Switzer, Al, 513
 SWOT (strengths, weaknesses, opportunities,
 and threats) analysis, 94–95
 Sy, Thomas, 142–143
 system output, 473–474
 systems approach, 18–19
 systems thinking, 152
 Szamosi, Leslie, 210–211

T

Taatgen, Niels, 164
 tact, 202
 tactical plans, 88
 Tagiui, Rento, 166
 Taleb, Nassim, 43
 target group definition, 271–272
 targeted report, 448
 task forces, 148, 149
 task structure, 136–138
 tasks
 in job design, 396
 of teams, 146–147, 351
 Taylor, Frederick W., 12, 13
 team charge, 349–350
 team learning, 152–153
 team selection, 350

team-based libraries, 359–360
 teams
 accountability of, 357–358
 coaching, 354–355
 collaborative communities, 342–343
 communication and, 356–357
 creating, 348–349
 definition of, 143, 344–345
 empowering, 351–354
 e-team issues, 335–336
 feedback and, 357
 group decision making, 168–170
 importance of, 341–342
 integrated, 144
 maintaining, 355–356
 motivation of, 311–312
 negotiation in, 358–359
 organizational issues, 345–347
 overview of, 143–147
 planning for, 345
 questions for approach to, 145
 self-managed, 144
 sharing of work activities, 7–8
 span of control and, 149
 team charge, creating, 349–350
 team environment, 350–351
 team member issues, 347–348
 team resources, 354
 team selection, 350
 team-based libraries, 359–360
 teamwork for performance, 293
 trust and, 354
 value of, 343–344
 technical words, 183, 201
 technology
 challenges of, 457–458
 cloud computing, 476–477
 collaboration for, 478–479
 communication through, 179–180
 costs, controlling, 466–468
 digital content, 469–473
 as disruptive force in workplace, 221
 e-leadership, 332–335
 environmental scanning variable, 41
 Gen Y and, 379–380
 intellectual security, 474–476
 librarian career plan and, 532
 library design and, 483–484, 487
 planning for, 464–466
 quotations on, 456
 role in library operations, 458–460
 security, 473–474

- social media, 477–478
 - staff background/training for, 460–464
 - technology scout, 460
 - technostress, 462–463
 - TechSource Online (ALA), 458
 - teenagers, 484
 - telecommuting jobs, 540
 - Teleometrics International, 327
 - temperature
 - for library, control of, 491–492
 - library building sustainability, 499–500
 - temporary work, 540
 - Tenbrunsel, Ann E., 510
 - Tepper, Bennett J., 510, 513
 - Terblanche, F., 225
 - territorial option, 140
 - Terzian, Dan, 458
 - tests, for job applicant, 398–401
 - theft, 492–493
 - Thenell, Jan, 62
 - Theory X, 299–301
 - Theory Y, 299–301
 - thinking, 228, 229
 - Thomas, David A., 377
 - Thomas, R. Roosevelt, 375
 - Thomas, Stewart, 163
 - Thompson, Bruce, 250
 - Thomsett, Michael C., 252
 - Thornton, Carl, 409
 - 3M, 224
 - throughput, 32
 - Tichy, Noel, 158
 - time
 - for communication assimilation, 189
 - for team creation, 346
 - time frame for team, 347
 - time management, 137–138
 - timing, of public relations, 282
 - titles, 120–121
 - Tjosvold, Dean, 110, 113
 - Todd, Peter, 2, 3
 - Todnem, Rune, 217
 - tort law, 63–65
 - TQM (total quality management), 249
 - traditional authority, 114
 - training
 - in ergonomic library equipment/furniture, 55
 - of library staff, 58, 407–408
 - for new employee, 405–406
 - of staff, diversity and, 377
 - staff technology training, 460–464
 - of teams, 350–351
 - of volunteers, 419
 - trait approach, 322
 - transactional leadership, 323
 - transformational leadership, 323, 331
 - Transportation Agency, Santa Clara County, Johnson v.*, 392
 - travel scholarships, 541
 - Tregoe, Benjamin B., 165, 166
 - Tretheway, Barton G., 99
 - Trevino, Linda K., 527
 - Trinidad, Cristina, 331
 - Trist, Eric
 - on contingency theory, 20
 - on organizational environments, 37
 - on turbulent environment, 159
 - Trotta, Carmine J., 488
 - Trotta, Marcia, 488
 - trust
 - coaching and, 329–330
 - delegation and, 134–136
 - of employers, lack of, 532
 - for group decision making, 170
 - nonverbal communication and, 200–201
 - team empowerment and, 352
 - team feedback and, 357
 - teams and, 354
 - Trustees. *See* board of trustees
 - trusts, 450–451, 452
 - Tucker, Cory, 530
 - Tunstall, Pat, 405
 - turbulent environment, 38
 - Turner, Anne M., 445
 - Turock, Betty, 364, 365
 - Tushman, Michael, 225
 - Tvarzka, Kathryn, 280–281
 - Twait, Michelle, 486
 - Tzabbar, Daniel, 208
 - Tzoc, Elías, 532
- ## U
- Uchitelle, Louis, 407
 - Uklja, Mick, 381
 - uncertainty, 86–88
 - unfreezing, 213
 - unions, 393, 416–417
 - University of Arizona Library, 146, 359
 - University of California, 167
 - University of California, Los Angeles, 7
 - University of Hawai'i–Manoa (UH), 241–242
 - University of Maryland Libraries, 359
 - University of Nebraska–Lincoln Library, 142

- University of New Mexico
 - disaster recovery at, 495
 - security at, 494
 - Starbucks in library, 486
 - University of Texas Southwestern Medical Center's library, 132–133
 - Urwick, Lyndall, 8, 13, 14
 - U.S. Department of Labor, 55, 395
 - U.S. Merit Systems Protection Board, 417
 - U.S. Supreme Court, 78
 - USA PATRIOT Act, 69, 70, 72, 475
 - user data, 253–254
 - user privacy
 - intellectual security, 474–476
 - legal issues of, 69–73
 - user-centered assessments, 237
 - users
 - crime at library, prevention of, 493–494
 - disruptive user behavior, 57–62
 - as key to library marketing, 268–269
 - LibQUAL+ library assessment, 249–250
 - library assessment for, 238–239, 241–242
 - library budget advocacy and, 433
 - library design and, 486–487
 - library marketing, reasons for, 266–267
 - marketing data collection from, 270
 - marketing process, 271–275
 - safety issues at library, 491–492
 - technology, expectations for, 457–458
 - technology planning and, 465–466
 - TQM for library assessment, 249
 - utilitarian theories, 512
- V**
- Vaara, Eero, 102
 - Vakola, Maria, 222
 - Valdes, Manuel, 535
 - valence, 298
 - Valentin, Erhard K., 94
 - Valentine, M., 191
 - Valentine, Sean, 331
 - Valentinov, Vladislav, 90–91
 - value
 - of teams, 343–344
 - value assessment for library, 241–242
 - value orientation, 161–163
 - value statement
 - as key element in strategic plan, 88
 - preparation of, 95
 - values
 - ethics and, 511, 514–515
 - politics of, 125
 - qualitative decision-making techniques, 173–174
 - variances, 448
 - Varner, Iris, 377
 - Vaska, Marcus, 503
 - verbal abuse, 59–60
 - verification, 403
 - Verrill, Phil, 292
 - veterans, 378–379, 380
 - video interviews, 537–538
 - video-on-demand, 461
 - virtual teams, 312, 335–336
 - virus-checking programs, 474
 - visible organization, 121–125
 - vision, 321, 325
 - vision statement
 - advice for crafting, 92–94
 - example of, 93
 - as foundation of planning, 86–87
 - Joseph Mika on, 90
 - as key element in strategic plan, 88
 - revisiting, 89
 - visually impaired users, 67
 - Voelpel, Sven C., 224
 - Volunteer Match (website), 420
 - volunteers, 417–420
 - Von Bertalanffy, Ludwig, 18
 - voting paradox, 169
 - Vroom, Victor H., 306
- W**
- wage, 392, 403–404
 - Wageman, Ruth, 351
 - Walden, Graham R., 254
 - Walker, Richard, 37
 - Walter, Virginia
 - on evaluation/assessment, 236
 - female leadership book recommendation, 331
 - on project management, 101
 - Walters, Bruce, 156
 - Walters, Suzanne, 265
 - Walton, Linda, 100
 - Wang, Catherine, 224
 - Ward, Patricia Layzell, 318
 - Ward-Griffins, Catherine, 217
 - Warnement, Mary, 501
 - warrants, 72
 - water damage, 496
 - Waters, Natalie, 343
 - wave theory of needs, 296, 297
 - Wayne, Richard, 86

- Weber, Max
 administrative approach contributions by,
 13, 14–15
 on authority, 114
 website, library, 279, 284
- Weingand, Darlene
 definition of marketing, 267–268
 on library marketing, 265
 on marketing audit, 277
- Weir, Anthony, 225
- West, James A., 195
- West, Margaret L., 195
- West, Michael, 355
- Westerbrook, Roy, 94
- Western Electric's Hawthorne, Illinois, plant, 16
- Westmoreland, Douglas D., 503
- Wheeler, Maurice, 373
- Whelan, Debra Lau, 522
- Whipple, Robert, 200
- White, Bonnie J.
 importance of people skills, 3
 on preparation for tomorrow's workforce, 2
 on staffing, 388
- White, Lynda, 253
- White, Ralph, 322
- white-collar work, 343
- white lies, 514
- Whitear, Greg, 200
- Whitten, Dwayne, 371–372
- Whittington, Richard, 103
- Wigdor, Lawrence, 303
- wikis, 196
- Wildavsky, Aaron, 432
- Wilkins, Val, 292
- Wilkinson, Frances C., 498
- Williams, Mark, 370–371
- Willis, Alfred, 252–253
- Willis, Mark, 62
- Wilson, Concepcion, 171
- Winston, Mark, 364, 365
- WIPO (World Intellectual Property Organization), 76, 469
- Wise, Lois Recascino, 312, 313
- Wisse, Barbara, 110, 113
- Witt, Andreas, 50, 51
- Wolf, Dominique, 250
- women
 gender differences in leadership, 331–332
 staffing practices, gender diversity, 371–372
- Wood, Daphne, 318
- Wood, Elizabeth J., 265
- Woodward, Belle, 527
- Woodward, Jeannette
 on job market, 539
 on electronic privacy, 71, 475
- Woolridge, Bill, 102
- word choice
 in communication process, 183–185
 overreaction to words/phrases, 199
- work analysis, 255–256
- work groups
 committees, 147–149
 teams, 143–147
- work sampling, 255–256
- working practices, flexible, 540
- working teams, 344
- work/life debate, 541–542
- workplace health/safety issues, 392–393
- World Intellectual Property Organization
 (WIPO), 76, 469
- WorldShare Management Services, 476–477
- Wotruba, Thomas R., 510, 513–514
- Wren, Daniel, 6
- Wrong, Dennis Hume, 114
- Wynn, Michael, 372
- Wyoming State Library, 118
- X**
- XML (eXtensible Markup Language), 473
- Xu, Yu, 200
- Y**
- Yagyu, Sachi, 153, 523
- Yan, Zheng, 50, 52, 67
- Young, Arthur, 322
- Young, Victoria L., 265
- young adults, 68
- Youngblood, Stuart A., 527
- Yukl, Gary, 320–321
- Z**
- Z39 standards, 247
- Zaccaro, Stephen, 222
- Zaleznik, Abraham, 319–320
- Zeidner, Moshe, 328
- zero-base budget (ZBB), 440–441, 444
- Zhu, Lihong, 359
- Zigon, Jack, 358
- Zimmermann, Felix, 50, 51