MANAGEMENT BASICS FOR INFORMATION PROFESSIONALS
Instructors adopting this textbook for a course may request supplementary case studies by e-mailing editionsmarketing@ala.org.
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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

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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!


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.


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 (Mackenize, 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-
Chapter One

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

**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.
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

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.
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?

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**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.

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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 material, and other activities ensures that everyone is involved and engaged in the success of the project. This approach not only builds teamwork but also fosters a sense of ownership and pride in the work being done. Additionally, it allows for a more inclusive and collaborative environment where all team members contribute to the overall success of the project.
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.

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**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.”
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

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

![Organizational Skill Sets](www.alastore.ala.org)
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.

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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.
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.
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.
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

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**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.

**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.

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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-

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**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 Arnow (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

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**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.
YOUR FUTURE AS A MANAGER
Early 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:

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.
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.
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.

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.
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Launching Pad


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.
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