



ALA GUIDES FOR THE BUSY LIBRARIAN

CATHERINE HAKALA-AUSPERK

BE A GREAT BOSS

ONE YEAR TO SUCCESS

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CATHERINE HAKALA-AUSPERK

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PREFACE

You've just been promoted, or maybe you've just appointed a new person to be the “boss.” Maybe you or they are the new page supervisor, or perhaps the technical services director, or, who knows, it could be the director.

You know just what it takes to succeed. A new boss needs to attend a couple dozen workshops, take a few classes, read a few of the right books, and hook up with some excellent role models or coaches and find a mentor.

But who has the time—or money—for that? Success needs to come a lot faster. This workbook can help.

Not only will it cover, in just one year, key issues and realities that all bosses need to know but also, and perhaps more important, it will introduce and establish a development and learning style that will perpetuate year after year.

Nobody wants to fail. Every boss really *wants* to be a “great” boss.

In order to make that happen, there's a lot of work to do . . .

INTRODUCTION

This is not a textbook.

There are plenty of them out there, if that's what you're looking for. Richard Rubin, a mentor and my first library school professor, wrote the classic *Human Resources Management in Libraries: Theory and Practice*. You could read that if you're looking for a classic, traditional textbook. Actually, I credit this disclaimer to Rubin, who is also Kent State University's library school dean, because he once opened a human resources lecture I attended by saying, "I am not a lawyer. I am not a lawyer. I am not a lawyer."

Well, this is not a textbook.

What this *is* is a workbook . . . and you're going to do the work. Within these pages is a compilation of trusted, experienced, and knowledgeable advice in areas you'll need to master in order to be a better boss. If you have people around to help you develop your skills, you're as lucky as I've been. But the more I travel around the country and talk to library leaders who are floundering, the more I've come to realize that not everyone is that lucky.

And here's one more thing that this book is *not*. It's not just one person's (my) opinion of what makes a person a good boss. Over the past twenty-five years I've collected, written, spoken, presented, whispered, conferenced, published, and otherwise handed down advice from some leading experts on libraries, management, leadership, and (now, don't roll your eyes if this sounds corny) life. It's all here.

And what do you have to contribute to attain success? Just one hour a week.

That's it. But, simple as that sounds, it's nonnegotiable. And, hey, I'm really doing you a big favor. If you haven't heard by now, managers, leaders, bosses *never* plan time in their schedules to just stop working and think. And we need to. All of us. So by the time you finish this workbook, you're not only going to be a great (or better) boss, you will have also developed the phenomenally productive habit of setting at least one hour aside every single week to think, reflect, and plan and, as a result, you're going to continue getting better all the time.

How does it work? It's easy. Start by getting out your calendar, whether you write it down, memorize it (oh, those were the days), store it online, or chip it in

stone. The first thing you *have* to do is block off one hour a week to work through this book. Every month's topic, every week's readings, even your homework exercises are going to help you develop the skills you really need in your job. So frame out a schedule to get through this workbook, get it down, get it in writing, get it in place, even if you have to move some sessions around because something comes up. A piece of advice: don't try to read through the whole book at once. It won't be as much fun, you won't really do the thoughtful work you need to do, and, well, it just isn't that easy.

Give yourself time to learn. There's a lot you have to think about. If being a great boss was just pushing papers around, anyone could do it. Give yourself this year and then, when you feel better about yourself, you can start helping someone else.

In the end, we all win as our libraries improve.

In these pages, week by week, you'll be asked to consider just about every aspect of a boss's job. You'll just think about some, you'll read about others, and then you'll apply it all in the exercises that follow each section.

Wait a minute. Don't even *try* to argue that you don't have the time for this process. Most of us, prob-

ably all of us, *waste* at least one hour each week doing something we don't need to do, redoing something someone else already did, or just cutting a day short here or there. If you absolutely, positively can't find this time, then give up a lunch hour or come in early once a week. Or, if you must, work at home, on your own time.

You'll grow. You'll come to feel that all the authors and speakers and teachers within these pages are friends of yours, just like mentors with offices right down the hall. All of their shared wisdom and valuable advice will come back to you right when you need it and, best of all, your staff—and your customers—will see you become a stronger, more effective, and happier boss.

Write in this book as you go. (I know that's not easy for librarians, but really, it's okay.) Tuck copies of articles in the pages. Send excerpts to friends and to new bosses or those who could use a refresher. Share what you're learning with your colleagues. Have fun.

Someone someday will be talking about the time they spent working for you. Maybe they'll be counseling someone who is thinking of applying for your staff. "Don't worry about the drive or the pay or even the job," they'll confide, "just take it! It's worth it just to work for such a great boss!"

Attitude

WEEK ONE

THE ATTITUDE YOU DISPLAY

If you aren't going to read this chapter, then don't bother with this book.

The title of this chapter is no joke. Your attitude is everything. With the right attitude, you can become a great boss. People will *want* to work for you. Staff will turn down better job offers if it means leaving your library. Your successes will be legendary. With the wrong attitude, you're going to count the days to retirement, like a ten-year-old waiting for summer vacation. Think about it.

This is the most important choice you'll make, and it will determine every aspect of your success from this point on.

I hope you are a boss for the right reasons. That is, I hope you have become a boss because you wanted to be one, not because you were the last person left standing, so to speak. Or, worse yet, not because you were the best at doing the tasks that were required of your old job. It's happened. I'm sure you've seen it too. The very best librarian, the "reference queen," gets moved into the branch manager's job when it opens up. She has had absolutely no managerial or supervisory training. She's never, in all her years, shown even the most marginal interest in supervising others or offering "big picture" ideas. So now she's the boss and all the boss stuff is sitting, undone, on her desk. But she's still out there on the floor, answering the complex questions in record time. Great. That's just great. But who's running the show?

I urge you to take some time today to think about the power that your supervisor's attitude has always had over your life—both at work and beyond. Early in my career, before online schedules, we were allowed to make copies of the printed schedules and take them home. Mine hung on my refrigerator. After getting three kids ready for school, packing five lunches, and (usually) cleaning up after the dog, I was ready to race out the door to work. But first I'd stop at the refrigerator to see who my "boss" or the PIC (person in charge) would be that day. On that point, the rest of my day hung in the balance. I'd see that it was either "Yeah, fun, whew. This

should be a good day” or “Damn. It’s Captain Moody today. This is going to be a loooooong one.”

Does your staff need that? Hardly. Remember the kids and the lunches and the life I mentioned earlier? I believe that every single employee has the right to have a good boss. One that is in the job for the right reasons. One whose attitude reflects positivity, respect, support, and encouragement. None of us needs to spend our days ducking away from emotional, moody, unresponsive, and unsupportive supervisors. We have enough to deal with in our “real” lives. How can we ever expect our employees to have the right attitude if their bosses don’t?

If things like hissy fits, moodiness, playing favorites, and so on describe you, then you need this book but it probably won’t do any good. Unless you’re ready to change your attitude.

When you become the boss, please realize that you literally hold the lives and, in large part, the happiness of all of your staff members in your hands. Schedules, budgets, furniture selection, and Chamber of Commerce luncheons aside, the single most inarguably important part of the attitude you display must be this: *Treat your staff well.* It is within your power. You *can* do it. How?

Attitude is your paintbrush. It colors every situation.¹

Adjust your attitude.

Here’s one of the best frames of reference about attitude that I’ve ever heard. It’s called “Permanent Whitewater” and I give full credit for it to John Schreiber and Becky Shannon, who for years facilitated Ohio’s Library Leadership Institute. I share this with all the new bosses I have the privilege to train.

Whether you are going to be the boss for one day a month or every single day from today on, you need to come to the library each morning expecting *per-*

The KEYS to PERMANENT WHITewater

- Keep paddling
- Cooperate from front to back
- Steer!
- Pull over every once in a while and rest
- Dodge all the rocks you can
- Be prepared to flip—and right yourself again
- Switch sides once in a while
- Wear life jackets
- Lock yourself in for the bad parts
- Know you’ll get wet²

manent whitewater. Expecting chaos. Expecting the need to make decisions, solve problems, and provide stable direction and leadership. When you close the car door in the morning and walk toward your library, you should not be thinking “I hope I can finish that annual report draft before lunch, so I can get caught up on those late evaluations. And I’ve got to get those schedules done and the budget started. Nobody better try to interrupt me.”

Instead, put on a life vest and wade in with the *right* attitude: “Okay, I’m not going to get to that annual report draft today. I better be sure to walk around the building to see if I can help keep things to a dull roar. *We* might have a couple of people call in sick; something’s been going around. I’ll make some changes to the schedule. Hmmm, I wonder how Dave’s mother is doing in the hospital.”

Being prepared for permanent whitewater will give you the attitude you need for that day, and then you can expand that to fill the whole year, as well as the next. You’ll still get your work done. But you’ll be putting the people whose lives you touch first.

Now, that’s a great boss!

WORKSHEET

-1-

Welcome to your first homework exercise. Don't skip it. A big part of the development process you're in for the year will include your participation in these journaling, researching, and reflective exercises. So go ahead. Your hour isn't up yet.

1. **Think back to** the worst boss you've ever had (no names, please). How would you describe her or his attitude?

2. **Think of an** example of something you saw a boss do to you or a coworker that had a significant, negative impact on them. What was it, and how could the *right* attitude have made a difference?

3. **How about your** best boss ever; how was her or his attitude different? How could you tell?

4. **Search for some** articles (you notice I didn't say "Google some articles"; I assume you have excellent database access as well). Read at least three with suggestions on getting and keeping the right attitude for leadership. Print them out, if you like, and clip them to this page. Summarize them here. What did you learn?

5. **Hopefully, you've got** a little bit of your hour left. Now, please go do something. Nothing to write down for that. It's time to get out of your office and practice a little "MBWA" ("Management by Walking Around"). Go observe the attitude your staff members exhibit and those of other supervisors, if there are any. If you find some bad examples, start thinking of ways to offer coaching for improvement. Say something exceptionally nice to the first employee you see when you step away from this book. Or just pitch in at the circulation desk and help out. Or pick something else. Do *anything* that shows the attitude of a great boss!

Success with Stakeholders

WEEK ONE

YOUR BOARD

Let's just say it out loud and admit that, first and foremost, anyone who would volunteer their time, often in an industry whose operations are totally foreign to them, and who would eagerly attend night meetings, day meetings, trainings, seminars, and other outings for the benefit of their libraries deserves our utmost respect and appreciation.

But let's be honest too. There are as many horror stories out there about "Boards from Hell" as there are titles by Danielle Steel. So whether you're the department boss or the branch manager or the director . . . how do you deal with your board?

First and foremost, you deal with them patiently.

To say new board members have a lot to learn about libraries is true, and yet this really only speaks to one of the smallest of the hurdles they and you face. What's bigger? They have to learn to be board members. And that's an even tougher tightrope walk.

First, most feel they were selected or appointed or elected because of a particular strength or experience they bring, and that's probably partly true. But while they sit at your meetings and make decisions about your future, they have to wear another hat too, and that's the harder one to grasp for most. The second "role" they play is that of "Joe Community." They each are expected to represent the overall community they serve and see to it that the library's policy stays on track with community-relevant interests.

That's where you come in. You must *patiently* remind them to stay focused on the policy end of your operation and let you or your director do the administrating.

Next, you should deal with your board respectfully. Help them learn. Acknowledge that it's *their* town and *their* neighbors being represented. Even if you live nearby too, you still have a more personal interest in the job. So while you're being

clear and firm about where their role stops and yours begins, be respectful and understand that they'll need some time to catch on.

And finally, deal with your board *consistently*. Set a high standard from the beginning for how quickly you'll answer their e-mails and calls, how thoroughly you'll prepare the massive amounts of paperwork they'll be perusing, and how simply and comprehensively you'll be presenting issues for their consideration, with all sides of an issue or problem represented. Once the board trusts you to be outstanding at *your* job, they can spend more time learning how to become better at theirs. Until then, they're going to be spinning everyone's wheels trying to do both.

One last suggestion is to be sure your staff know the board and vice versa. Rotate assignments for attending board meetings. Have staff make short (very short, because everyone's tired at 8:30 at night) presentations at the end of each board meeting to share or demonstrate something about the library's services that might be new. Actually, for your new board members, everything is new. Put their pictures and names up in your buildings, so both staff and customers can recognize them, literally and figuratively, for all they do.

What should you do if you're still having problems with your board? The same thing you should do with

WHY ARE THEY HERE?

Why would a person seek or accept a job in the public domain that sometimes draws criticism, pays nothing, is time-consuming, requires great diplomacy, and deals with a never-ending stream of complex problems, the solutions to which are often hard-won compromises?

- Because they believe strongly in the importance of libraries to their community
- Because they feel the need to represent the interests of the community to the library director and to the funding agencies
- To try to preserve what they see as traditional library service in light of the overwhelming influence of technology
- Because many see a responsibility to oversee the fair and ethical expenditure of public tax dollars
- Because of the social prestige¹

all your problems . . . ask your more experienced colleagues for help and advice. We're all in this together, and when we put our heads together, we've seen it all.

WORKSHEET

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- 1. How well do** you know your board members? Whether you're in a school or public library or even with a special organization, you can't possibly know them well enough. They're too important, especially to the bosses. Compile a brief biography of each member and attach it to this workbook. Include as much info as you can find about them. And while you're at it, share your final document with the rest of the staff and, if possible, with your customers, so they can all get to know the board better too.
- 2. Find an online** board orientation training program and review it. Or review your library's, if you're lucky enough to have one. There are some great examples on WebJunction and also on the websites of many state library organizations. What do they focus on? What do people need to learn about libraries in order to become good trustees? Once you've answered that question, jot some notes about how you can help better prepare them for their roles.

- 3. Find someone who** can tell you a story (or find an article online) about a "Trustee from Hell." What was the problem that trustee posed and how was it—or could it have been—resolved? No one intentionally accepts these demanding roles only to fail. We need trustees' help and they need ours. Again, jot some notes about how you can play a role in reducing these stumbling blocks.

- 4. With trustees on** your side, you can do a lot more for your staff and your library than you can without them. List one initiative or activity that you can plan *right now* that will involve one or more members of your library's board. Build a bond and help each other succeed.

- 5. Is there a** board in your community or in your library community that you might join? Look around for a good one (they all need supporters) and find out if and how you can get on it. Being a board member is one of the best ways you can come to understand other board members and how you can work better with them. What's your plan?

Staffing

WEEK ONE

HIRING AND FIRING

Entire libraries could be filled with all the books written on the topics of hiring and firing. Still, the single most inspirational hiring concept that I've heard in twenty-five years doesn't involve what you might expect to find in those books. It's not about how to do behavioral interviewing (although that is critical). It's not about performing drug and background checks (but don't skip those). It *is* about finding and keeping only the best.

It tells us we should accept *only* greatness. It's about great staffing at *all* levels. Just as collection development isn't just about buying books, but is also about weeding them, this idea does not just cover only hiring staff, but also helping the wrong people move on and developing the ones you keep. It's about who you hire, who you keep, and who you let go. Or, in the words of Jim Collins in *Good to Great and the Social Sectors*, it's about doing "whatever you can to get the right people on the bus, the wrong people off the bus and the right people into the right seats."¹

The best part is that any boss can do this. Jim Collins explained that Colorado high school teacher Roger Briggs applied this principle when he decided he *could* change the culture of the department he ran. How did he do it? He demanded greatness and he accepted nothing less. Collins explains that Briggs "began to view the first three years of a teacher's career as an extended interview."² He also completely changed the standard, all but expected three-year tenure track from "Yes, you'll likely get tenure, unless you've done something egregious" to a default of "No, you will most likely *not* get tenure, unless you have proven yourself to be an exceptional teacher."³

A critical part of his process was an honest, ongoing evaluation of each employee for their first few months and the honest understanding that if they did not prove themselves to be exceptional, they wouldn't be staying. Collins explains further that "early assessment mechanisms turn out to be more important than hiring

mechanisms. There is no perfect interviewing technique, no ideal hiring method; even the best executives make hiring mistakes. You can only know for certain about a person by working with that person.”⁴

So picture yourself at the decision-making point of your hiring process. If you have two *good* candidates from whom to choose, whether they be internal or external, my (and Collins’s) advice to you would be . . . repost! Don’t hire, don’t retain, and don’t settle for *good*. Insist on *great*. Teach yourself and your other hiring supervisors not to tolerate anything less in your staff than greatness and, seat by seat, you’ll turn your bus around too!

Here’s one way to apply *great* guidelines when making hires. At my library, we truly believe the *attitude* of our staff is more important than their skills. Not that skill doesn’t matter, because it does. But in our particular search for greatness, we feel attitude matters more. So we “scan” for that. We have no reference desks at my library and no circulation desk. We support our customers’ success in using their library by having staff all around, out on the floor, to help whenever and wherever needed.

We understand that it takes a special staff member to make this approach work, so more than once we’ve “prescreened” applicants *just* to check their attitude, their approach to working with others, and their communication skills. How? In groups, we’ve asked them to work together doing everything from building a bridge out of rolled-up newspapers to writing a rhyming answering machine message to explain the library’s closing on Groundhog Day.

Try whatever works for you. If your staff like to have fun (and they should, because, if not, why is everyone getting up in the morning?), then have fun with the activities. Let your applicant see the type of library you really are—and find out who they really are—behind their resume—as well.

As one expert explained, “It’s about learning to recognize and identify those qualities that drive individuals to succeed . . . optimism, empathy, persuasiveness. Forget about hiring for experience and hire based on that optimism, persistence and resilience that come through in a positive way.”⁵

Remember, your goal is to make sure that, in the end, the person you are bringing on board is the right person for your culture, the best person for the job, and the greatest person for your library.

No discussion about hiring would be complete without a note on hiring for diversity. If you don’t know that this means more than how many colors of the

Richard Rubin, dean of Kent State University’s School of Library and Information Science and a renowned expert on HR issues, outlined seven key principles for successful staff management:

1. *Principle of organizational survival*—Help accomplish organizational goals by managing people properly. Unfortunately, views people as means to an end. Mitigated by next principle.
2. *Principle of individuality*—People are important as individuals and must be afforded attention and respect even when organizational ends may be affected. Manifest in benefit programs, privacy, no mandating [that] all think the same.
3. *Principle of consistency*—You can’t apply rules in an arbitrary fashion. You will lose the confidence and respect of your employees. Being consistent often interferes with being fair.
4. *Principle of fairness*—Where consistency demands uniform application of rules and regulations, fairness demands that the rules themselves be just and justly applied.
5. *Principle of legal responsibility*—Personnel policies and practices must remain firmly within the bounds of the law, and no individual in authority should be permitted to order or encourage an employee to commit an unlawful act.
6. *Principle of happiness*—A personnel system should promote the greatest happiness for the greatest number. So policies [are] designed to maximize job satisfaction within a context that allows the organization to accomplish its goals.
7. *Principle of ethical action*—Examples of ethical breaches: privacy, misuse of authority, organizational inadequacies.⁶

rainbow are represented on your staff, then admit you are ready to learn more about this important facet of organizational success. Do you have a policy for ensuring that you have all kinds of people contributing to your success, and then make sure everyone follows that policy? If you don’t, then start working on your director or your board and get one written. You don’t need to read a list of the values that staff of many different ages, backgrounds, cultures, races, orienta-

tions, and lifestyles can add to your library. Everyone knows that. What most people don't know is how to find that mix.

Here's one simple and foolproof idea to follow. Stop and look over every interview pool before the first appointments are set. Is diversity reflected in the pool? If not, then what does that tell you about the odds of adding diversity to your staff? Make sure that every opportunity to add a new employee also offers an opportunity to diversify. Maybe that means finding a name in your "B" pile and moving it over to "A." Try it. You'll be surprised what you might have missed.

After the new person comes on board, your job is far from finished. Not all hires turn out well, to no one's particular credit or blame. If yours isn't going so well, you should know that your leadership is needed at this point more than ever. You have to fix it. Firing is to hiring as weeding is to collection development. One is really just as important as the other. Even though you may not want to, sometimes you just have to do it. You can be left with no other choice. Just be certain that you've tried the other choices earlier, and they didn't work. But it's never easy when you are negatively affecting the life of another human being. There are ways to ensure that your firings, which you will have, are the best they can be.

First, don't let it get personal. Although you must always maintain your own and your employee's dignity, you, as the boss, must also keep a professional distance and viewpoint. Don't use conversation that makes it about the person. For example, instead of "You haven't been doing your job well," perhaps "The library needs a different kind of performance from the person in your position." It's not about you versus them. It's about what's best for your library. Always, always leave the person with his dignity intact.

Second, be able to honestly say, "I did absolutely everything humanly possible to help this person turn himself around and succeed." Then make sure that's

true. Use frequent meetings, clear goal setting, fair and enforced improvement deadlines, applicable training opportunities, and perhaps even counseling to improve the situation. Do everything you can. In the end, the best you can do is to say "we tried to avoid separation" and mean it.

Popeye was right: "I y'am what I y'am." The most common—and fatal—hiring mistake is to find someone with the right skills but the wrong mind-set and hire them on the theory, "We can change 'em.'"

Firing is one of the most difficult things a boss can do. But don't avoid it. You can cause immeasurable, irreparable damage to your staff by dodging making that tough decision and leaving the wrong person in the wrong place. Everyone else depends on your decision-making in these situations.

So try to resolve the issues, try to improve the performance, and if that doesn't work, be the boss and make the tough call.

Then, with the position open, review everything you can find on hiring the *right* person and try again!

Suggested Reading

Collins, Jim. *Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer*. Boulder, CO: Harper-Collins, 2005.

WORKSHEET

1. **Most frequently, bosses** don't review their interview questions until the applicant is almost at the doorstep. That's too late to realize how old and "dated" they seem or that they're not going to tell you what you need to know. Find the most recent interview questions in your files and review them, *but first*, list here the qualities you hope to identify when interviewing. Then, toss the questions that don't apply.

2. **Think of at least three other ways**, besides using a traditional interview, that you can gain valuable insight about potential employees. It's okay to get help with this one. Remember what you learned in your first library class . . . the reference librarian's best resource is the telephone. Call a couple of experienced bosses and ask for advice.

3. **All of the above work applies** to new staff you'll be adding. Now take a look at your existing staff and, first, list the ones with the best attitude below. Then list those who could use some coaching. Do you see the obvious? Outline a staff-mentoring program that will bring them together. (Remember to articulate your goal for this program clearly, so everyone involved takes it as seriously as they need to.)

Funding

WEEK ONE

BASIC BUDGETING

A budget is a plan for getting and spending money to reach specific goals by a certain time.”¹

This just may be the one part of your “boss” job that you find the most frightening. And it doesn’t matter how much or how little money you control. If you’re running a department, you might be in charge of a small portion of your library’s budget, or perhaps you’re the branch manager or even the director and you’re responsible for the whole thing. One marker of the difference between professionals and paraprofessionals in most libraries is that the former are charged with the responsibility for money. There’s a reason for that. As the boss, you will be managing money, there’s no way around that. As a *great* boss, you’ll be managing it responsibly, knowledgeably, and openly. Whether you have frighteningly little training or a PhD in finance, you *can* learn to manage financial resources in a way that benefits your staff, your community, and your library *if* you stay focused on a few simple guidelines.

First and foremost, you will need to know (and admit) what you don’t know. Always start there. Most of us didn’t choose to go into library work because we’re dominated by the left side of the brain, which is all scientific, mathematical, and logical. Most of us and our staff members are liberal arts majors, right? We live on the right side, which favors great literature and history debates. Most of us prefer a rousing philosophical discussion or a haiku performance to spreadsheets and advanced Excel formulas. In short, there’s a lot we don’t—or didn’t—know about budgeting when we got started. It’s all right to admit that. As a matter of fact, it’s required. Just as with any other topic, there’s an almost never-ending supply of books, articles, and courses out there to help us learn. Not to mention our more experienced peers and our industry’s many organizations and chapters.

The greatest damage I've ever seen done in this arena was achieved by those who thought they had to pretend to know it all because they were the boss, so they stumbled along making one serious mistake after another like the Lone Ranger. Start by taking the most basic course or even a workshop in library funding. That beginning step should help you determine what further level of training and growth you'll need to do your job well. There are a lot of simplified versions and instructions out there. As with most complex issues, the best advice remains, keep it simple!

Keep this in mind too as you get started. Don't let history run your library. You're the boss. Don't be afraid to consider financial or budgetary changes. While you may be worried that you're messing with success, your ideas and new approach might be *just* what your staff and library need the most. Business concepts come and go. We've had *just-in-time* inventory, *one-minute* managers, and even concepts as routine as strategic planning over the years; all good ideas in their own time, until newer, more useful practices came along. See what's new out there and test your options. The budgeting model used by your predecessor for the past twenty years may *or may not* be the best path for your library to be on right now.

Lucky for library budgeters, we're starting from a good place. In a survey run by Public Agenda and published in a report called *Long Overdue*, the public's trust in our financial management and viability was confirmed. The report stated that "because most Americans believe libraries use tax resources wisely, libraries do not have to fight the 'cut the waste first' attitudes the public brings to so many issues of public funding."² We need to maintain that trust through careful budgeting. Then, when and if we must make the case for additional tax support, our reputation can speak for itself. "Even people who rarely or never use libraries," the report continues, "support raising taxes over other money-saving measures to help libraries."³

So let's go back to our first admission. It's time to answer some basic questions honestly. Did you know that there are four different types of budgets you could be using? Do you know what they are? Did you know that your library's strategic plan should be *directly* tied to your budget? What role does your county govern-

FOUR BASIC RULES about BUDGETS

1. A budget is a plan for spending money to reach specific goals by a certain time.
2. Any budget or plan is only as good as the time, effort, and information people put into it. Good budget practices should foster collaboration and exchange information among the budget team participants.
3. No budget or plan is perfect, since none of us can totally predict the future.
4. In order to reach our goals, all budgets and plans must be monitored and changed as time goes on.⁴

ment play in your funding and budgeting requirements? How about your local school board? What about your state library organization or state librarian?

Chances are, you have a lot to learn. The good news is that your eagerness, your dedication, your experience, and your potential got you into this job and will serve you well as you add new skills and abilities. That's really why most of us accept promotions, isn't it? To continue learning and growing? So start with the best sources around you—your peers—and start benefiting from as much of their experience as possible. Then look around for courses that can bolster your knowledge and fill in the gaps in your expertise. While we're *still* not splitting the atom here, creating, communicating, implementing, and evaluating your library's budget is going to be one of the most important aspects of your job as the boss and will have a trickle-down effect on everything, *everything* else that you, your staff, and your library accomplish.

Suggested Reading

Dropkin, Murray, and Bill LaTouche. *The Budget-Building Book for Non-Profits: A Step-by-Step Guide for Managers and Boards*. San Francisco: Jossey-Bass, 1998.

WORKSHEET

1. **Make a list** below of what you *don't* know about budgeting and what you *do* know. This will help get you started on the path to learning and it will help remind you that you're going to need help here. Be honest and as thorough as you can be.

2. **Take out the** most recent financial report you can find for your library. Hopefully, it won't be too old! Spend some real, focused time reading through it—carefully—and make notes below on questions that pop up. Next to each question, note who or what you'll consult to find answers.

3. **Make a list** of peers, colleagues, and perhaps even teachers who could help you begin to sharpen your budgeting skills. Create a "financial learning plan" for yourself, and be gentle. You can't be expected to master all of this overnight. But detail how you will go about answering short-term—and long-term—questions and building your skills.

4. **It's time to** get started. Set up *at least one appointment* right now, before your one hour is up for the week. Who will you speak to first to start your financial skill-building plan? Even if you've done budgets before, this is not an area where you can be lax. If you have time today, start following up on as many other contacts you've listed as possible.

5. **It's also never** too early to get started building your library's *next* budget. What method will you use? Zero-based? Programming budget planning? Design an agenda for a management team meeting that can help answer this question and map out a plan for your financial future.

Funding

WEEK TWO

THE PROCESS

By now you know you don't have to be afraid of budgeting. With the strength and knowledge of you and your staff, it's going to be just one more tool you use to move your library or department forward. But whatever else you do, don't try to go it alone.

This is where you get your team behind you from the beginning, so that, from day one, they are both creators and, perhaps most important, they are supporters of the financial decisions you've made. Your library board probably has a finance team or committee that it uses to make decisions. Governments, from local city councils to Washington, do as well. If you've done budgets before on your own, now would be a good time to reconsider establishing an in-house finance team of your own. If this is your first budget, you're in luck. You get to start out on the right foot from the beginning. What will your finance team do to help you? Plenty. With representation from all departments and branches of your organization, your team will work with you and the library's staff to analyze needs, assign priorities, forecast possibilities, discuss, debate, and, finally, develop and monitor your library's budgets.

Look around you. If you are the director, then select some key members of your administration to join this special subcommittee. If you're a branch manager or department head, select some other staffers involved in your area to join you. Look for other talent as well. I worked in a library once that was fortunate enough to have an MBA on staff, in a "nonfinance" position. The organization was wise enough to include her and benefit from her expertise in most finance matters.

First of all, make sure you understand the ground rules of the process you're beginning. Are you required to submit information to another government agency? If so, by when and in what format? Does your board have policies governing resource allocation or per capita spending? What are they? If you have formal policies and procedures in place, it's your job, as the boss, to know and understand

DOs and DON'Ts of BUDGET TEAM MEETINGS

In Meetings, Your Team Should

- identify issues and problems
- generate ideas and suggestions
- hold brief discussions
- make decisions
- report progress

In Meetings, Your Team Should *Not*

- have long and involved discussions*
- gather detailed information*
- analyze problems in detail*
- do background work for problem solving*

*“Ideally most—if not all—fact-finding, analytic, and detailed work should be done by individuals or by small subgroups between meetings. In this way, only the results [and not the time-consuming process] are presented to the entire team during the team meeting. This strategy will free up time for the tasks for which the entire team needs to be present.”⁵

them. You can change them later, if need be. But, for now, when you begin the budgeting process, they'll be your guideposts along the way and will help steer you toward success.

As your budgeting process moves forward, your next step is to decide what type of budget best suits your library's needs. To be honest, most nonprofit organizations, like libraries, use a simple, “incremental” budget system that simply increases the previous year's line-item amounts by a value equal to inflation. But don't feel compelled to use this system, even if it is the historical favorite. This is the place for you to learn about alternatives, such as zero-based budgeting or program budgeting, and this is the time in your process for your team to focus on alternatives. Do the research together, vet the pros and cons of all options, and pick the best process for your needs. Then get busy learning it inside and out.

The next step may be one of the most critical, as well as one of the most underrated, parts of the budgeting process. Establish a calendar! Why? Because, as we've said all along, involvement of staff members

BUDGET PROCESS STEPS

You've heard that even a walk around the world begins with the first step. Break the budgeting process down; it's worth your time.

1. Build your team.
2. Make sure you understand policies and procedures to be followed.
3. Choose the budget style that suits your library *today*.
4. Establish a calendar (that meets all deadlines).
5. Examine.
6. Plan.
7. Create.
8. Communicate.
9. Continually reevaluate.

is critical in establishing buy-in. A calendar, designed by your team to clearly involve input from your staff, clearly illustrates to everyone that all parts of the budgeting process are important. Plus, it establishes clear deadlines. The more people you have involved in this procedure, the more important it is for everyone to know what part they play, when they play it, and when they have to be ready with their input.

Once you have an effective calendar in place, you can reuse it, year after year. It can remind you not to jump over sections, and it can remind your staff and board that, on a continual basis, their input will be a critical element in the library's financial success.

You are on your way, at this point, to creating, communicating, and implementing a successful budget that mirrors your library's strategic plan and will help you reach your goals. This is one of the single most important things you can do as a boss, whether you run your entire system or an individual department. Just like schedules, budgets are pieces of paper that we *can* master. But remember one more thing, once your budget is completed.

You have to go back to it, month after month, and reassess, reevaluate, and recommit to its goals. Remember, “a budget is an estimate of the costs for some activity over a given time frame. People tend to forget that a budget is a plan.”⁶ If you don't keep the numbers real, if you don't react to your environment and make realistic changes to the budget when necessary, then you've just committed the age-old librarian error of just filling another binder for the shelves.

WORKSHEET

1. **List the four** most common budget formats used by libraries and comment on how much you know about each. If you don't know enough, do some reading to get the basics. Now, which one is best suited to work in your library? Once you've made your selection, note it here and start doing some *serious* reading and studying to prepare your library to do it right.

2. **Identify members you'd** like to invite to join your finance team. Even if you have a group with which you've worked before, consider all the staff. Is there anyone you can add? Write all team member names below and note what they bring to the process. (If they're just there because of their title but they don't bring anything, think about excusing them for one year and including someone else.)

3. **Do you have** a budget cycle calendar? If so, describe it below and consider whether revisions could improve it. Should more time be given over to research and discussion? Do you scramble to meet outside deadlines? If you don't have a calendar yet, create one here.

4. **Next, list all** the things you've learned about budgets in just the past two weeks, as well as the areas in which you still plan to get stronger.

People

WEEK ONE

GROUND RULES

What you have to remember is that they call it “human” resources for a reason. As has been already stated, your job—as the boss—is all about the people on your staff. Not the DVDs. Not the programs. Not even the books. Your librarians and support staff have been charged with taking care of them. You’re the boss and, as such, decisions that impact the day-to-day lives of your staff are in your hands.

“Human” resources refers to the incredible, immeasurable value contributed by the *people* on your staff. While dealing with, protecting, developing, and managing them can be an incredibly complex process, your one single goal should be simple. Value them.

If you’re lucky enough to have a competent HR person on your staff, you’re halfway home. In many libraries, though, the director or manager is also the HR person. If this is you, I suggest you seek help. Join a professional HR organization (even if you have to do it online), go to a conference, or join a roundtable or HR interest group. Send out a homing pigeon with “I need to speak to a professional HR person” on a note wrapped around its leg. Or just call the nearest library that has an HR professional and find a way to barter the sharing of her skills.

Human resources work is not for the faint of heart. It often calls for tough decisions and challenging conversations, at least when it’s done right. It’s also not for amateurs, especially when it comes to points of law. Remember the reference in the beginning of this workbook . . . “I am not a lawyer. I am not a lawyer. I am not a lawyer”? Luckily for us all, the ALA and the PLA can be there to help when we don’t happen to have a lawyer, or an experienced HR person, handy.

As the boss, you also have to keep on top of things, though. And “I didn’t learn that in library school” is not an acceptable dodge. Take a class (the CPLA program offers a great one), read a blog, check out a book on HR law . . . do *something* to bring your skills and understanding up to speed and keep it there. But don’t ever go

that extra mile and consider yourself the legal expert, especially when you hold someone's future in your hands. Your smartest step would inarguably be—to make a friend. Look to a neighboring library or a local or state organization and make friends with people who know all the HR stuff you don't. Ask questions. Don't ever be ashamed to admit when you're puzzled. The true shame would come in the form of a damaged career or, worse, a lawsuit that might result if you try to go it on your own.

Where do you start? How about with your hiring process? You can't rewrite all your procedures in one sitting and you probably don't have to, but, as they come up, follow them with an eye toward evaluating the legality—and humanity—of your library's practices and policies. When you see something that raises a red flag in your mind, you'll probably be right to have an expert take another look.

Think about how your library hires new staff, from the wording of the ad you run (on what is it based, is it fair?) to the interview questions you use (do they really reflect the current job description, or have they grown into a "wish list" that doesn't even realistically match the salary anymore?) to the comparison of all your applicants' answers (how do you "score" or evaluate one candidate against another? Did you clarify the "right" answer before you started, so you'd have a clear measure to use?).

You shouldn't be concerned about legal issues such as these because you're trying to keep from being sued; you should care about them because you want to sleep at night. You should care about them because it's your job now to protect the interests, futures, and present situations of everyone who works honestly and diligently for you. These are some heady decisions you get to make now, as the boss. You get to decide, literally, whose family gets to eat and whose does not. It's not your *fault* that they all need work, any more than it is that they're not all going to find it. But it is your *decision*, and you need to trust that you're making fair decisions.

Raise the bar at your library. Ensure that your staff can see integrity in the hiring process by treating all applicants with the utmost respect, honesty, and legal fairness possible.

And speaking of *all* applicants, is there any diversity in that pile of names to be interviewed? If you don't *interview* diverse candidates, you'll never *hire* diverse candidates. So how can you make sure both you and your staff understand what that really means?

DON'T SETTLE!

When hiring, look for these key leadership traits in *all* your staff:

- strategic thinking
- execution (and proven follow-through)
- decision-making
- technical competence and expertise
- teamwork
- ability to inspire
- ability to (positively) influence others
- emotional intelligence
- creativity
- resilience
- capacity (and desire) to learn¹

Other legal issues will come up. Have no fear that, as the boss, you'll be asked to decide everything from exactly what type of headdress fits in the dress code to what happens if someone needs six days to grieve a loss, instead of five. A lot of HR is black and white, law or not a law, and for that part, you need to admit what you don't know and call in the experts, before you get your library in trouble or cause a big hurt you can't fix.

Still, even more of HR work is intuitive, personal, and judgmental (in a good way). To prepare yourself to make those interpretive decisions, you need only have a heart and a conviction to respect your staff, above all else.

I can't help but share, at this point, the very best piece of hiring advice I've ever encountered. It is, if they're not *great*, don't hire them. If you find *good*, keep looking. Don't let an opening in your schedule and its resulting impact pressure you into settling. Jim Collins explains it this way: "Those who build great companies understand that the ultimate throttle on growth for any great company is not markets, or technology, or competition, or products. It is one thing above all others: the ability to get and keep enough of the right people . . . When in doubt, don't hire—keep looking!"²

Suggested Reading

Collins, Jim. *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*. New York: HarperCollins, 2001.

WORKSHEET

1. **Gather copies of** all the interviews your library uses. Does each have questions that will demonstrate the qualities listed in the “Don’t Settle!” insert? If not, write some new questions that do.

2. **List at least** ten different people, places, or groups that could offer you help or advice on human resources topics such as hiring or staff development. Be sure to include all contact information (numbers, web addresses, etc.), as you’ll likely be referring to this page again.

3. **What is your** library’s stand, policy, or general opinion of diversity in hiring? Read it over and make notes about how diversity *is* being supported and how it could be *better* supported.

Already supported by:

Could be better supported by:

4. **If you didn’t** find anything in writing for question 3, then you are going to need to start the process to create a policy or procedure. Make some notes here on how you’ll do that. Include asking other libraries for samples, doing online research, and looking for advice from some of your question 2 list in your plan.

Your Future

WEEK ONE

DAMAGE CONTROL

Before this yearlong development project ends, you have to know something important. You're going to make mistakes. You'll tell others on your watch that they can have bad days and then you yourself will have them too. There's no escaping it. You'll encourage supervisors to always be appreciative in their mentoring, and then you'll come down on someone. You'll expect others to make good, thoughtful decisions and then you'll make a bad one. All of this, everything you've read and learned and will continue to learn, won't work every day. But that's okay, for two reasons. The first is that we're all just human, and the second is that we can apply *damage control* and then try again.

When she came into her manager's office, the department head was distraught. Everything was a mess and, at least in her opinion, it was all her fault. The story went like this. When she'd first hired her good friend as a librarian in the department, she figured it would be easy. They got along really well, continued to confide in one another like they'd done for years, and were even able to go out together once in a while, while keeping their relationship at work professional. Or, at least, that's what she'd hoped.

Lately, though, her friend had been coming in late habitually and not getting her work done, and the rest of the department was suffering and, now, claiming favoritism. The manager asked her if she'd been addressing and documenting the tardiness and other performance problems. No, she answered uncomfortably, she hadn't. It had seemed too weird to do that. They'd known each other for twenty years. After all, other than recently, the librarian was great at reference and storytelling. This morning, though, the union rep had called her and asked for a meeting, telling her a class action grievance was being filed against her for allowing the problems to go on uncorrected.

DAMAGE CONTROL EMPHASIS

Don't Focus on:

- Blame-storming instead of brainstorming
- Scorekeeping
- Long memories

Do Focus on:

- Action
- Quick recovery
- Coping
- (Later) accountability for impact on results and people¹

You're probably wondering why, after almost an entire year working through this development book, you are just now getting to the *basics*, like making mistakes. It's because some things will recur in almost every situation you'll encounter. This story is just one example of a basic truth you'll need to face—you're going to make mistakes. It doesn't matter how much you read or how hard you study or what you're able to learn, you simply cannot be a great boss all the time. And that's just the first basic truth we'll deal with in this, your final month.

So what happened?

The manager in this situation, who was one of the best I've ever known, had just two words for her department head: *damage control*. When you make a mistake or act on a poor judgment or just plain miss something, think *first* of your primary responsibility—the library—and take steps to make sure to minimize the consequences however you can. Who might be hurt by your error? Can you intervene to limit the damage? What might be the repercussions down the road? How can you ameliorate them? Spending time, especially at the beginning of a problem, wringing your hands or berating yourself doesn't protect your library or your staff from additional damage. You need to do that first.

As author John Miller has stated, "Ownership is a commitment of the head, heart and hands to fix the problem and never again affix the blame."²

Later, after the dust has settled, there will be plenty of time for review and for finding that one thing (at

MISTAKES ARE INEVITABLE—WITHOUT THEM, SUCCESS IS NOT

Jack Ricchiuto points to several "successes" that took some practice:

- In a survey of baseball greats, we find that the top 10 hitters took an average of 54 swings for each home run.
- The *Star Wars* movie concept was rejected by twelve Hollywood studios before it was finally accepted.
- Post-it notes failed in all four of its first market tests.
- In 1962, Decca Records told the Beatles that groups with guitars were on their way "out."³

least) that you can learn from a bad experience, which will make you a better boss going forward.

When you're the boss, the best thing you can do is to close your car door in the morning and walk toward the building thinking, "I can handle whatever happens today. I can improve it or support it or, if necessary, fix it." Because that's what others will need you to do. What you should never walk into work thinking is, "I've learned all I need to know. I'm perfect and nothing will go wrong today. If it does, I'll be certain that it's someone else's fault." Those bosses are yesterday's bosses, literally and figuratively!

A very wise pediatrician once advised new parents that if their child didn't have at least one bump or bruise or Band-Aid on him at all times, they were being overprotective parents, which is potentially even more damaging. The same can be said of organizations. If someone on your staff doesn't make a mistake with consistent regularity, then you're not all trying enough new ideas or taking enough risks. Just like debt, risks are to be well managed—not avoided.

Another factor that will assure your staff that you're going to help with a crisis and not just react to it is memory. Yours. Imagine how difficult it would be for you to do your job if every single mistake you've ever made was brought up and reviewed at the beginning of each staff meeting. What kind of confidence and trust would that build between you and your staff? Everyone needs the chance to start over every day.

To live and learn, as the saying goes. At one library, when kids (or adults) become over-the-top disruptive or rude or even antagonistic, they're sent home *for the day*. Staff guards escorting them out of the building, with the kids grumbling all the way, dismiss them with a call of "See you tomorrow." They can come back and try again.

Most libraries operate that way, since it would be unreasonable to assume that everyone who acts out will be banned for life. Staff deserve that same opportunity. Don't grudgingly harbor ill will from transgressions gone by. Give everyone, including yourself, a chance to show what they've learned and how they've grown.

How can a great boss be so open and accepting of mistakes? Perhaps that's the greatest secret of all.

It's called kindness. While you may not have read it in the job description, that's the element of your personality—the most basic component—that's going to make a success out of all you do. "Kindness and leadership," Baker and O'Malley suggest, "are complementary and . . . this combination *specifically* gives a leader a crucial edge."⁴

Be as ready for failure as you are for success because you and your staff will face both. And that's a basic fact.

Suggested Reading

Baker, William F., and Michael O'Malley. *Leading with Kindness: How Good People Consistently Get Superior Results*. New York: American Management Association, 2008.

WORKSHEET

1. **Think of the** most recent time a member of your staff has reported to you a mistake she has made. List as much about your initial reaction as you can recall and then consider it against the “damage control first” concept.

2. **How could your** reaction to the incident in the first question have been better? How would you react now, if you had another chance?

3. **Think of the** most upsetting mistake you have made recently. List as many things as you can think of that you can learn from the experience.

4. **If they were** asked, what might your staff say is your normal reaction when something goes wrong? If you can't honestly answer this yourself, go ask some of them.

5. **From the answers** in the question above, how do you think you can be better prepared, each and every day, to react well to mistakes? What *specifically* can you start doing today?

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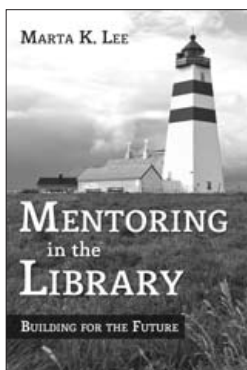
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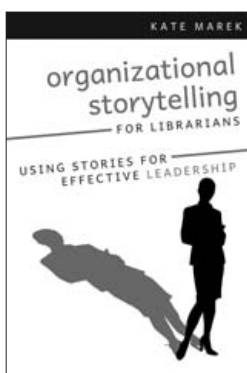


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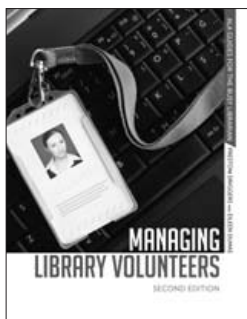


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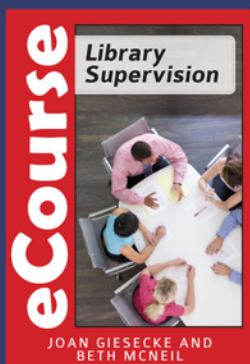
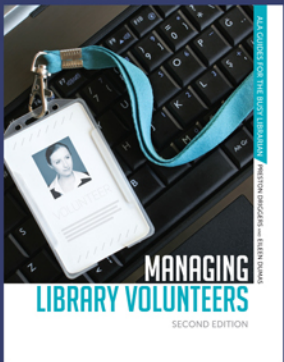
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