THE THEOLOGICAL LIBRARIAN'S HANDBOOK

Management in Theological Libraries

VOLUME 5

EDITOR: STEPHEN SWEENEY

atla
Collectors & Connectors
in Religion & Theology

Management in Theological Libraries

The Theological Librarian's Handbook – Volume 5

EDITED BY STEPHEN SWEENEY

SERIES EDITOR MATINA ĆURIĆ

atla Open Press

Cover design by Simply Aesthetic

Contents

Principles

Processes

Personnel

Principles

Leadership, Management, and the Role of Administration in Theological Libraries

STEPHEN SWEENEY

Viewed through the lens of theological libraries but broadly applicable to libraries of all types, leadership, management, and administration all play crucial roles that contribute to the library's success. This work happens in the context of a larger institution as well. Leadership within a library involves setting a forward-thinking vision that meets the current and future needs of the community: "Leadership is a process whereby an individual influences a group of individuals to achieve a common goal" (Northouse 2022, 6). Library leaders inspire staff, perform strategic planning in collaboration with their institution, encourage innovative services, and create an inclusive environment that fosters growth and learning. Unlike leadership, library management organizes resources, handles daily operations, and oversees staff ensuring staff members have the necessary support to achieve their objectives. Managers oversee budgeting, staff scheduling, program coordination, and resource

allocation to ensure smooth, responsive operations. According to Peter Drucker, management is essentially a relationship between managers and the most important assets of any organization are the employees (1990, 147). Meanwhile, administration encompasses the oversight of library policies, strategic planning, and adherence to institutional guidelines. Administrators manage the library's legal and regulatory compliance and create policies aligning the library's mission with larger organizational goals. Administration is the act of leading, managing, and supervising an organization or a group of workers (Hardy, Lambert, and Weimer 2008, 13). Understanding these distinct roles is crucial for effective library operations, as each contributes uniquely to overall functionality. Leaders expend their effort on strategic planning and motivating the team; managers create policies and coordinate resources to keep the library running efficiently; and administrators create a framework of policies and compliance measures.

This chapter aims to define leadership, management, and administration within a library and to emphasize the importance of recognizing their differences. However, it is important to acknowledge that a single person in the library may serve in multiple roles as the administrator, the manager, and the leader. By understanding these distinctions, theological libraries can operate more effectively, creating a balanced, innovative, and organized institution that meets community needs.

Leadership in the Library Setting

"Management is efficiency in climbing the ladder of success; leadership determines whether the ladder is leaning against the right wall" (Covey 2004, 101). Leadership in a library involves innovative thinking and strategic planning to align the leaders with their followers (often staff) in setting shared goals. Those goals include meeting the evolving information needs of faculty, students, and staff. A library leader is responsible for systems thinking, building relationships, managing conflict, and being able to inspire and influence others toward shared goals (Stueart and Sullivan 2010, 14). This role includes inspiring among staff a shared vision that allows the library to embrace change, develop its staff professionally, and build an environment of ongoing engagement and service improvement.

Leaders are also responsible for cultivating community connections, creating partnerships, and promoting library services to ensure the library remains relevant and responsive to community needs.

Effective library leaders demonstrate innovation in programming and foster creative approaches to services and outreach. They advocate for resources and work to secure funding and support to enhance library services. Leaders encourage collaboration within the library team and with external community organizations (within the confines of the goal of the parent institution the library serves), strengthening the library's role as a community hub. Additionally, they often serve as public figures, representing the library in community events internal to the organization and externally, advocating for the library's role in public education and information access.

Leadership theories such as transformational and servant leadership are particularly relevant to libraries. Transformational leaders inspire and motivate by setting high expectations and fostering a forward-looking environment. This leadership style stands in contrast to transactional leadership and broadly holds the modern definition of leadership. James MacGregor Burns defined transformational leadership as "occurring when one or more persons engage with others in such a way that the leaders and followers raise one another to higher levels of motivation and morality" (1978, 20). Servant leadership is built on transformational leadership as well as on authentic leadership with altruism at its core (vanDuinkerken and Kaspar 2015, 13). Articulated by Robert Greenleaf, this model of leadership emphasizes the leader's role in supporting the team's growth and the community's needs. Servant leadership, on the other hand, "selects the needs of others…as the leader's main aim" (vanDuinkerken and Kaspar 2015, 13). Both approaches contribute to a positive, user-centered library environment that supports staff development and active community engagement. Additionally, these leadership styles enhance the library's culture, promoting a sense of purpose, teamwork, and a proactive approach to improving library services.

Management in the Library Setting

While leadership focuses on the bigger picture, management is more concrete and focuses on getting things accomplished. "The art of getting things done through people" is one definition of management

(Stueart, Moran, and Morner 2013, 6). Management in a library encompasses the organization, coordination, and control of human and information resources to ensure efficient library operations. Managers are responsible for executive function roles, including controlling, planning, organizing, and staffing. Communication roles in which library managers might find themselves include spokesperson, allocator, leader, and figurehead (Stueart, Moran, and Morner 2013, 9–11). Managers are also responsible for handling budgets and maintaining the library's infrastructure.

The core functions of library management include overseeing the cataloging of materials for easy access by the library's users, staffing to meet institutional needs, organizing services to enhance user experience, and maintaining the collection for quality and relevance. Additionally, library managers oversee daily operations, including facility maintenance, budgetary considerations, and policy implementation.

Management has been recognized as a desirable skill set for a long time. Still, it has only been in the past 150 years that a particular interest has been given to management as it pertains to organizational success (Evans and Alire 2013, 11). Two management theories—scientific and systems—can be applied to library settings. Scientific management emphasizes a fair day's work for a fair day's pay, and one of its first proponents was Frederick W. Taylor (1911, 49). The efficiency and task optimization that spring from this style prove useful for workflows like cataloging or circulation processes. Systems theory relies on the interdependency of all the parts of the organization for the success of the whole. Because this way of thinking views the library as an interconnected whole, managers can successfully coordinate resources and services effectively, ensuring that each department functions cohesively.

Key skills in library management include communicating, decision-making, and advocacy, which allow managers to address operational challenges and adapt to changing patron needs while ensuring the team stays cohesive. Budgeting skills are crucial for allocating resources effectively, while technology proficiency helps managers streamline operations and optimize services. These skills enable managers to meet library goals and respond and advocate effectively up and down the hierarchy of the institution.

Library managers also fall into what can be referred to as a so-called middle ground, being responsible for staff and to supervisors. "A manager is a coordinator who makes certain things get

done…" while helping to manage expectations of the superior in the organization (Farrell and Schlesinger 2013, 117). With this understanding, managers play a critical role in a library's success. They can ensure efficient resource use and effective service delivery. Library managers create an environment in which students and faculty can access services easily, and staff can work effectively, helping the library achieve its mission of serving the community's educational and informational needs.

Administration in the Library Setting

As outlined in the beginning of this chapter, library administration involves leading, managing, and supervising the organization and its staff. Some of the principles of administration include providing managerial unity, delegating responsibility, determining, creating, and overseeing policies, engaging in long-term planning, managing budgets, and fostering stakeholder relations. Administrators are responsible for establishing good communication and maintaining efficiencies in library operations and services (Hardy, Lambert, and Weimer 2008, 13).

Additional key functions of library administration include making decisions, developing goals, and effective use of staff (Hardy, Lambert, and Weimer 2008, 13). Decisions are guided by the policies of the library and the institution the library serves. A decision might come from a manager or a leader. Administrators are also responsible for advocating for the library's role in the institution and ensuring compliance with legal and regulatory standards to maintain accountability and transparency. Planning is crucial to the effective use of staff. Departures can mean realignment; ongoing consistency and care for employees are vital to a healthy work environment.

Library administration varies across contextual settings. Academic libraries often focus on supporting research and instructional goals, aligning with university standards, and reporting to academic boards. Theological libraries typically have more specialized mandates, with a focus on distinct funding, private stakeholder engagement, including a board of trustees, and adherence to theological education guidelines and accrediting standards. These library leadership or management style variations reflect unique governance, funding structures, and stakeholder priorities.

Conclusion

Effective leaders, managers, and administrators work together in theological and other library settings to ensure a library's success. Leadership has evolved over time; in 1927, a proposed definition of leadership was "the ability to impress the will of the leader on those led and [to] induce obedience, respect, loyalty, and cooperation" (Northouse 2022, 2). Today, effective leadership happens through influence. Library leadership at its best sets a vision and inspires both library staff and user populations, guiding the library toward innovation and responsiveness. Management brings this vision to life by coordinating daily operations, handling resources, and supporting staff effectively. Many competencies accompany management, including knowledge of twenty-first century technology and applications, the global workplace, and management skills of nonprofit organizations, to name just a few (Todaro 2014, 10). Administration creates the necessary policies, funding structures, and compliance frameworks to sustain library functions and uphold institutional standards.

When brought together, all the people who hold these roles foster a dynamic and organized library environment, enabling staff to serve their community's needs while aligning with broader organizational goals, thus ensuring operational success and lasting impact. A leader might also be a manager and an administrator. The roles that librarians and library staff play in their libraries and their institutions situate them uniquely to potentially serve all three of these roles on a daily basis.

References

Burns, James MacGregor. 1978. *Leadership*. New York: Harper & Row.

Covey, Stephen R. 2004. *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change: Restoring the Character Ethic*. Rev. ed. New York: Free Press.

Drucker, Peter F. 1990. *The Essential Drucker*. New York: Harper Business.

Evans, G. Edward, and Camila A. Alire. 2013. *Management Basics for Information Professionals*. 3rd ed. Chicago: Neal-Schuman.

Farrell, Robert, and Kenneth Schlesinger, eds. 2013. *Managing in the Middle: The Librarian's Handbook*. Chicago: ALA Editions.

Hardy, LeAnne, Linda Lambert, and Ferne Weimer. 2008. *The Librarian's Manual*. Cedarville: Association of Christian Librarians.

Northouse, Peter G. 2022. *Leadership: Theory and Practice*. 9th ed. Thousand Oaks: Sage.

Stueart, Robert D., Barbara B. Moran, and Claudia J. Morner. 2013. *Library and Information Center Management*. 8th ed. Santa Barbara: Libraries Unlimited.

Stueart, Robert D., and Maureen Sullivan. 2010. *Developing Library Leaders: A How-to-Do-It Manual for Coaching, Team Building, and Mentoring Library Staff*. Chicago: Neal-Schuman.

Taylor, Frederick W. 1911. *The Principles of Scientific Management*. New York: Harper & Brothers.

Todaro, Julie. 2014. *Library Management for the Digital Age: A New Paradigm*. Lanham: Rowman & Littlefield.

VanDuinkerken, Wyoma, and Wendi Arant Kaspar. 2015. *Leading Libraries: How to Create a Service Culture*. Chicago: ALA Editions.

Library Management as Pastoral Care

DAVID W. KIGER

Management of a theological library has the potential to be a transformative exercise rather than a transactional process. The theological library is uniquely disposed to be a place for transformation because it allows space for pastoral care as both curricula and operational guidelines. A pastoral approach to management would not necessarily focus on control for the sake of the institution but instead pay attention to the flourishing and agency of the individual. For library management to create a pastoral lens, space for the transformation of the internal person must be available. In an era where efficiency and productivity often overshadow human concerns, the theological library stands as a unique institution poised to prioritize the flourishing and agency of individuals. In this chapter, I argue that by adopting a pastoral approach to management, theological libraries can create spaces that nurture the holistic growth of their staff, patrons, and supporters. The chapter begins

with an overview of management theory, highlighting the need for a pastoral approach, and then discusses Henri Nouwen's three dispositions that can shape the management of a theological library.

In her work on management theory, Lisa K. Hussey notes that the main theories of management concern two principal ideas: motivation and control (2019, 1). Management theories try to discern the best avenues for individual employees' motivation and use that motivation to control the circumstances of the library's work. These two ideas engage in the history of management theory, in which management principles focus on how to get the best productivity out of an employee or system. Some management theories emphasize what is best for the organization, so the focus is on productivity, while a natural inclination is often at the expense of human capital. In their discussion on the history of management, Moran and Morner note three current and emerging approaches to management. The three approaches are "an increased emphasis on quality; a growing reliance on evidence-based management and big data; and the development of a more employee-centered workplace" (2018, 29). While these trends allow for greater attention to the needs of the labor force, even in systems where a person is seen as important, their individual personal importance is seen within the context of the organization's goals and purposes, not in their individual humanity.

Persons filling management roles within a theological library must be concerned with the well-being of multiple audiences: those who work at the library, those who use the library, and those who support the library. These audiences are important not because of their role in the library structure, but because they are human beings. When library management views people through a pastoral lens, they become concerned with the dignity of people. The human person is composed of external and internal elements. Human beings have thoughts and ideas that are internal to themselves. These thoughts and ideas are sometimes expressed externally through words and actions, but at other times, these thoughts and ideas are cultivated within the interior person. A theory of pastoral management relies on the cultivation of the inner person as an essential element of library operations.

One of the greatest services libraries offer is space for reading and study, connection to resources and people, and internal reflection and dialogue. This latter space, the space for internal reflection, is often forgotten but absolutely crucial. As a scholar of human dignity, Donna Hicks notes, "I have learned that lack of self-knowledge—not

of our individual, unique qualities, but of a broader dimension to self-understanding—is our greatest collective ignorance" (2018, 29). Relating this thought to management, Hicks suggests that organizational culture requires a type of insight into "how to develop healthy relationships with people and about what it takes for all of us to grow and flourish" (2018, 47). A theological library offers such a space, where the person matters as a person and is then able to reflect on their thoughts and ideas.

The management of a library embracing this approach requires a focus on what Allison Pugh has called "connective labor." In a recent work on the importance of attention to the human person in the workplace, Pugh describes "connective labor" as the pastoral work of connecting with another human being, and she emphasizes that this labor is often unaccounted for in discussions about workplace productivity. Pugh defines connective labor as "the forging of an emotional understanding with another person to create valuable outcomes" (Pugh 2024, 16). Connective labor finds practical application in the realm of ministry. In Henri Nouwen's classic book on the nature of ministry, *The Wounded Healer*, he suggests that three dispositions should guide what he calls "Tomorrow's Leaders:" the ability to understand and articulate inner events, the capacity for compassion, and the ability to be "contemplative critic[s]" (2010, 41).

These three dispositions also serve as a guide for the management of a theological library. For the remainder of this chapter, I connect each disposition to a pastoral practice to show how pastoral care informs the management of a theological library. Each disposition and theme highlights the importance of the human person in the management system.

A Non-Anxious Presence to Help Articulate Inner Events

Leadership and management are fraught with anxiety. Anxiety about budgets and space, and how best to manage conflict and people, are all constants in managing a library. Some of these anxieties are amplified in a theological school setting. For a library manager, this challenge is one that is deeply internal to the person but has the potential to be expressed in external ways. Managing in such an

environment requires attention to one's internal conflicts and struggles. To be non-anxious demands reckoning with the anxieties one holds. When a manager is able to defer their own anxiety and keep it apart from those who are managed, a transformational experience occurs. A non-anxious presence leaves space for another person's anxiety. Such a presence acknowledges the real challenges of the situation but is not a victim to the worries that the situation presents. If the library manager is able to articulate their own anxieties, then that manager can help others do the same so that those anxieties lose their power.

Managing a theological library with a non-anxious presence creates space for listening to real and perceived procedural problems from library staff, patrons, and administration. A non-anxious presence allows for the person to be authentically themselves and to create the internal space for the person to learn and manage their own anxiety through articulating their own stresses. Nouwen suggests that "those who can articulate the movements of their inner lives, who can give names to varied experiences, need no longer be victims of themselves" (2010, 42). Errors made due to stress and anxiety are often compounded because of an individual's internal narrative about themselves and the situation. By being a non-anxious presence, the library manager focuses on the person instead of the problem and helps the vision of the library to be defined by hope, rather than by the confusion that anxiety brings.

Compassion in the Face of Change

Library management is in a constant state of change. There are new technologies, new workflows, new resources, new employees, new administrators, and new patrons. Something is always changing and new. When the COVID-19 pandemic put a pause on in-person schooling and universities and seminaries were forced to attempt distance education, libraries still needed to provide services and so still needed to be managed. Coming out of the context of the pandemic, Morrissey and Roberts suggest that a trauma-informed pastoral care model should serve as a management model, especially for student workers (2024, 77). Such a model emphasizes the need for compassion for student employees who are first and foremost people. The management of a theological library enacts pastoral care with

compassion and sensitivity to change because human beings are constantly surrounded by change.

As Nouwen states, "For a compassionate person nothing human is alien: no joy and no sorrow, no way of living and no way of dying" (2010, 45). Nouwen goes so far as to equate compassion with authority. In so doing, he highlights that compassion as authority focuses on the humanity of all people, and suggests that compassion as authority allows leadership to bring out the best in people. The library does not exist apart from people, and so people must be the priority of managing the library. One guiding pastoral practice is that of compassion, especially in the face of change. When changes occur for the employee, the patron, or the collection, the library manager can approach the situation with rigidity or compassion. Compassion emphasizes the humanity of the people involved and acknowledges the personal and internal challenges that are present in such a situation. Practically speaking, this means management handbooks and documentation need a constant evaluation of how the procedures apply to the people within the library. This means that rules, which are established for the good of the organization, should be imagined through the lens of the people involved and their humanity. When policies are envisioned through a lens of compassion for the person, policies will necessarily be augmented and personalized for the people involved.

The COVID-19 pandemic threw into sharp relief the volatility of our world. In a world awash with change, people need to experience compassion from people in management systems. Managers ought to practice compassion as a form of connective labor in order to acknowledge and meaningfully connect with the shared humanity of the people with whom they work. Such connection emphasizes the importance of the human person for whom the library exists.

Contemplative Criticism to Focus on Human Flourishing

The connective labor of library management with a focus on pastoral care creates what Pugh calls "three threads of connection" (2024, 42). First, dignity is established between the parties. Second, the two parties are bound together as people who matter as people. Third,

connective labor leads to a "greater understanding of self and other" (Pugh 2024, 48). These threads are themselves an act of what Nouwen calls "contemplative criticism" (2010, 47). Each thread focuses on connecting to the human being for their dignity and value as a person. There is a rich theological tradition of *cura personalis*, which focuses on the care of the whole person as a way of practicing ministry. This same type of care becomes critical of systems that seek to exploit and deny another's humanity. Focus on the care of the person allows library management to criticize elements of institutions and cultures that devalue the person.

In their study on the pastoral role of school librarians in England, Shaper and Streatfield suggest that librarians need to articulate this role as valuable to the library management to receive credit for their personalized way of operating a library (2012, 74). Such a personalized and pastoral approach to management emphasizes human flourishing. Whether it is for a library employee or a library patron, the goal of an interaction should be the betterment of the person. By its nature, management in such a posture is outside of societal norms that seek to promote organizational health, or that focus solely on productivity. Library management that focuses on human flourishing leaves space for transcendence in a world that is concerned with immanence.

Conclusion

There is a tendency in the modern world for people to prefer the immanent and, as a matter of course, remove the societal need for the transcendent. This way of thinking has had an impact on the modern Western world and has, in part, led to transactional ways of moving through the world. People do not treat others as people, but as means to control the end. The human being is not viewed in a way that allows for transcendence to break in and impact. Such an approach can readily be seen in the world of management. An organization wishing to be more productive might ask employees to work more for less pay or might search out nonhuman automated ways of accomplishing the task. With each growth of technology, there is a fear of the loss of human work.

I would suggest that theological libraries and their work are more than subject-specialty libraries. A theological library creates a

community that is drawn together by more than an academic interest in an intellectual discipline. A theological library serves as a locus of pastoral care where information retrieval is as much about the inner person as it is about the content of the subject under study. A theological library invites and encourages the element of faith in the intellectual process; such an invitation establishes and builds a faith that seeks understanding and inclusion. The management of such a library ought to focus on the human being as a person, and as such, must begin from a non-anxious, compassionate, and contemplative posture. In this way, the whole person can be understood and acknowledged as a person, and the library can be a place for transformation instead of mere transaction.

References

Hicks, Donna. 2018. *Leading with Dignity: How to Create a Culture That Brings out the Best in People.* New Haven: Yale University Press.

Hussey, Lisa K. 2019. "Management Theory." In *Library Management 101: A Practical Guide,* edited by Lisa K. Hussey and Diane L. Velasquez, 1–20. 2nd ed. Chicago: ALA Editions.

Nouwen, Henri J.M. 2010. *The Wounded Healer: Ministry in Contemporary Society.* 2nd ed. New York: Image Doubleday.

Moran, Barbara B., and Claudia J. Morner, eds. 2018. *Library and Information Center Management.* 9th ed. Santa Barbara, CA: Libraries Unlimited.

Morrissey, Jude and Roberts, Deanna K. 2024. "Re-Visioning Student Staff Management Through a Pastoral-Care Lens." In *Personalizing the Pandemic: Experiences of Theological & Religious Studies Librarians During COVID-19,* edited by Megan E. Welsh and Ian Burke, 67–86. Chicago: Atla Open Press. *https://doi.org/10.31046/atlaopenpress.96.*

Pugh, Allison J. 2024. *The Last Human Job: The Work of Connecting in a Disconnected World.* Princeton: Princeton University Press.

Shaper, Sue and David Streatfield. 2012. "Invisible Care? The Role of Librarians in Caring for the 'Whole Pupil' in Secondary Schools." *Pastoral Care in Education* 30, no. 1: 65–75. *https://doi. org/10.1080/02643944.2011.651225.*

Change Management in Theological Libraries

TIMOTHY D. LINCOLN

*T*he term change management became popular in American business circles in the 1990s with books like *Leading Change* (Kotter 1996) and *Who Moved My Cheese* (Johnson 1998). All kinds of organizations, including libraries, have used change management principles to help organizations that seem stuck in their ways adapt to changing circumstances. This chapter has four sections. First, it describes the main features of change management and distinguishes this approach from other management approaches that address change in organizations. In brief, change management is a multistep process requiring a guiding vision, leaders with sufficient power to effect change, the encouragement of taking risks, and eventual consolidation of progress as a new normal for an organization. Second, the chapter briefly critiques change management. Third, the chapter provides some examples of change management as applied in public and academic libraries. Finally, the author offers

suggestions for how a change management approach might be helpful to theological librarians.

What is Change Management?

To begin, this section describes the origin and distinctive ideas of the change management approach. Its roots lie in psychologist Kurt Lewin's (1951) model about how change happens in organizations. He describes three stages. First, an organization must unfreeze. Second, the organization makes intentional changes. Finally, as the changes become established in organizational habit, the organization regains a new and more productive equilibrium. The organization then refreezes in a new form. Lewin's key insight was that there is difficult psychological work to be done for an organization to realize that operating as it has habitually done is not meeting organizational goals and that, therefore, the organization must change.

As envisioned by John P. Kotter, change management is concerned with large-scale changes in organizations. Change management recognizes that techniques that work fine for managing small projects or modest changes in workflows do not conceptually address the complexity and stress that large-scale change produces in individuals working in organizations. As Kotter argued, successful change is "associated with a multistep process that creates power and motivation sufficient to overwhelm all of the sources of inertia" (1996, 20). Notice that although this approach is called change management, important facets of change management require vision, access to resources, and power. If one considers "management" as primarily concerned with the competent execution of predictable tasks and "leadership" as concerned with large-scale changes and organizational vision, then a better name for this approach might be *change leadership*, in keeping with the title of Kotter's book *Leading Change* (1996).

Kotter (1995; 1996) proposes that lasting organizational change typically involves a sequence of eight stages. First, members of an organization must acquire a sense of urgency. Unless staff feel the need to change, large-scale change will not happen. Second, a small group must become committed to leading the change. Third, this cadre of leaders needs to cast a guiding vision for the results of change. Fourth, leaders must relentlessly communicate the new

vision and model changed behaviors themselves. Fifth, action must be taken to remove institutional obstacles and encourage experimentation. Sixth, leaders must figure out how small signs of change can become visible to staff in the short term. These "wins" demonstrate that change is possible and desirable. Staff that played key roles in creating these wins should be visibly rewarded. Seventh, based on short-term wins, leaders consolidate gains and inspire more change that is consistent with the guiding vision. Finally, staff's changed behaviors and attitudes are solidified as part of the organization's culture. As envisioned by Kotter, implementing all eight steps is necessary. Skipping any step will delay or derail progress toward the desired change. While some stages of the process are iterative (first, there are several small gains, later larger ones), Kotter understands the change process as having an intentional beginning (creating a compelling sense of the need for change), a middle stage (steps two through seven), and an ending (the consolidation of gains as the new operational normal for an organization).

Kotter notes specific threats that may derail the change process at each stage. For example, during stage three, enough time must be taken so that all leaders agree on the new organizational vision: "Vision is never created in a single meeting. The activity takes months, sometimes years" (Kotter 1996, 81). To cite another example, during stage five, one threat to the encouragement of experimentation is the active resistance of managers who either oppose or do not understand the desired change (Kotter 1996, 115).

Other change management proponents have their own steps or terminology for describing the process. For instance, in Beverly Patwell's book *Leading Meaningful Change: Capturing the Hearts, Minds, and Souls of the People You Lead, Work With, and Serve* (2020, chapter 4) the four stages of the change process are called alignment, integration, action, and renewal. The seven steps of the process are called as follows: understand the need, enlist collaborators, envisage a new solution, motivate people, communicate the vision, act to create the vision, and consolidate gains.

Regardless of how the specifics of a given change management approach are arranged, the main conceptual point that distinguishes change management approaches from other approaches to management is that change management asserts the value of large-scale change, in contrast to some management approaches that argue that sustained improved performance comes incrementally from building on existing strengths (such as Elia, Veldheer, and Turner 2019).

Change Management Critiqued

Having laid out the basic ideas of change management, this section notes similarities with other approaches and offers some criticism. As an approach to leadership of organizations, change management is similar to adaptive leadership as articulated by Ronald Heifetz (1994) and colleagues (Heifetz, Grashow, and Linsky 2009). Adaptive leadership distinguishes between technical problems (which can be solved by tweaking processes) and adaptive challenges, the latter of which require deep organizational change. If a theological library needed to begin buying ebooks as well as print books, that change would be technical. If a theological library's mission was redesigned from only supporting the information needs of academic users to becoming a center for helping recent immigrants navigate government services and the legal system, such a change would require adaptive work in Heifetz's sense or would require a change management approach like Kotter's, because the changes required are qualitatively more complex than purchasing books in two different formats.

Both the change management and the adaptive leadership approaches focus on making decisions about significant changes in the direction of an organization (mission or vision) or profound changes in the methods used within an organization (a school decides to teach only online, and thus the library needs to be transformed from a library of print books to a library of electronic resources). Proponents of both the change management and the adaptive leadership approaches believe that gifted, charismatic, relentless leaders can create the conditions needed to overcome resistance to change—which is utterly normal. Such leaders marshal resources, remove obstacles, and ultimately transform an organization.

Change management approaches like Kotter's can be criticized for three reasons. First, while change management acknowledges the reality of organizational culture, there is little or no explicit attention given to the ways that gender, class, and race impact the work of persons within an organization. Neglecting these social factors may lead those promoting change to misunderstand some of the reasons why staff or other stakeholders resist change. Such neglect may lead to enacting a new vision that unintentionally reproduces existing inequalities. Second, Kotter's approach focuses on barriers to change within an organization, such as organizational culture and employee habits. He spends little time talking about how changes

might be resisted by those served by the organization, such as library patrons. Third, Boff and Cardwell (2020a, 2020b) found in their study of change at academic libraries that change sometimes was far less linear and sequential than Kotter's eight stages, especially when the change had to do with reorganization (2020b, 87).

Despite these criticisms, a virtue of the change management approach is that it suggests a clear set of steps for library managers to undertake in order to unfreeze an organization and make a change. By contrast, the model developed by Gunapala, Montague, Reynolds, and Vo-Tran (2020) of a library nested within a complex organization such as a university excels at showing the interplay of forces arrayed for and against change (such as stakeholder perceptions and advances in information technology). Still, such a model offers little practical assistance to a library manager who seeks to undertake large-scale change.

Getting Down to Cases: Change Management in Library Settings

Despite the criticisms noted in the previous section, library leaders have successfully used change management approaches in various settings. This section reports on how change management approaches were used in some public and academic library settings. Düren (2013) describes how change management informed transformational changes in German libraries, ranging from library mergers to the implementation of a radio frequency identification (RFID) system in an academic library with more than 750,000 print volumes. Wandi (2019) reported how Copenhagen's public library system implemented a new strategic vision. She noted that "trust is a particularly important element in implementing transformational changes because the fear of losing one's job or not being able to see [one's] self in new roles can be overwhelming" (Wandi 2019, 919). Boff and Cardwell (2020b) curated and analyzed change stories from twenty North American academic libraries. The kinds of changes discussed include cultural change, strategic planning, technological change, revising staff roles, and reorganizing units and lines of authority. In many cases, these libraries employed outside consultants to facilitate large-scale changes. Boff and Cardwell found that

Kotter's framework usefully described typical issues and sequences in the change process but concluded that "the use of and reliance upon a single model, whether for analysis or active use in the change process, is not enough," and that leaders require "additional expertise and resources, particularly when it comes to influencing human behavior" (Boff and Cardwell, 2020b, 291).

The Usefulness of Change Management in Theological Libraries

As the examples in the previous section report, change management approaches have been used effectively in library settings to produce large-scale changes. This section offers suggestions about the usefulness of change management in theological and religious studies library settings. In theological libraries with limited resources of personnel or funding, some change management techniques may not seem feasible. For instance, Kotter assumes leaders can reward staff for embracing a reforming vision. Doling out these rewards serves to motivate others to become allies of change. Few leaders of theological libraries can provide bonuses or promotions to early adopters of innovations. Indeed, if new costs are associated with implementing large-scale change, such projects may not be feasible in theological libraries serving struggling schools.

However, as Joshi (1998) noted in a review of Kotter's book (1996), the key ideas of change management are scalable; that is, they apply to making both small and large changes to goals or services. To successfully introduce even modest changes in a library setting, a leader should articulate reasons for the change, garner resources, inspire staff, and celebrate incremental achievements. The change management approach warns librarians against thinking that a vision for change is obviously better than current practices. In theological libraries hoping to make improvements in services, a change management approach is helpful because it pushes the librarians seeking change to take seriously the power of habit and routine in library operations. Envisioning and implementing new goals and workflows requires overcoming these inertial forces. The change management approach also pushes managers of theological libraries to overcome an emphasis on everyday library operations or frustration about the

ability of library staff to change. In response to these real barriers, the change management approach challenges library managers to understand themselves as persons with positional power, valuable ideas, and leadership skills—in other words, as leaders who have agency and who can nudge the librarians, they lead out of habits that no longer serve the needs of their patrons.

References

Boff, Colleen and Catherine Cardwell. 2020a. "Anchoring Change: Using the Kotter Change Management Framework to Analyze & Facilitate Change in Academic Libraries." *University Libraries Faculty Publications*. Bowling Green University. Number 63. *https://scholarworks.bgsu.edu/ul_pub/63*.

Boff, Colleen and Catherine Cardwell, eds. 2020b. *Leading Change in Academic Libraries.* Chicago: Association of College & Research Libraries.

Düren, Petra. 2013. *Leadership in Academic and Public Libraries: A Time of Change.* Chandos Information Professional Series. Burlington, VT: Chandos.

Elia, Anthony J, Kris Veldheer, and Bob Turner. 2019. "The Meanings of 'Innovation' in Theological Libraries: Bold Ideas of Empty Promises?" *Atla Summary of Proceedings* 72: 173–89. *https://doi.org/10.31046/proceedings.2018.111*.

Gunapala, Matara, Alan Montague, Sue Reynolds, and Huan Vo-Tran. 2020. "Managing Change in University Libraries in the 21st Century: An Australian Perspective." *Journal of the Australian Library and Information Association* 69, no. 2: 191–214. *https://doi.org/10.1080/24750158.2020.1756598*.

Heifetz, Ronald A. 1994. *Leadership Without Easy Answers.* Cambridge, MA: Belknap Press.

Heifetz, Ronald A., Alexander Grashow, and Marty Linsky. 2009. *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World*. Boston: Harvard Business Press.

Johnson, Spencer. 1998. *Who Moved My Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life.* New York: G.P. Putnam's Sons.

Joshi, Maheshkumar P. 1998. "Leading Change." *Personnel Psychology* 51, no. 1: 254–56.

Kotter, John P. 1995. "Why Transformation Efforts Fail." *Harvard Business Review* (March–April): 59–67.

Kotter, John P. 1996. *Leading Change.* Boston: Harvard Business School Press.

Lewin, Kurt. 1951. *Field Theory in Social Science.* New York: Harper & Row.

Patwell, Beverly. 2020. *Leading Meaningful Change: Capturing the Hearts, Minds, and Souls of the People You Lead, Work With, and Serve.* Vancouver: Figure 1.

Wandi, Christina. 2019. "Change Management in Public Libraries: Seven Recommendations from Copenhagen Libraries." *Journal of Library Administration* 59, no. 8: 915–26. *https://doi.org/10.1080/01930826.2019.1661746*.

Processes

One Library's Workflow and Processes for Record Management

LESLIE A. ENGELSON

Keeping track of files of bibliographic records, and procedures and decisions related to those records, can sometimes feel like herding cats. Trying to keep them together and moving in the same direction can be frustrating. Developing a data management plan to facilitate this process provides several benefits for the library and makes managing the metadata for those resources less daunting. Krier and Strasser (2014) speak to these benefits when they state that:

> Data management plans save time for the researcher over the long term. Effort spent before data collection begins can be focused on the wider context of the project rather than the details of a specific task or item. This ensures that the decisions made about data organization, management, and preservation are beneficial to long-term goals. Less time is spent rearranging, renaming, searching for, or otherwise

handling files and data sets if their organization and management are thought out well in advance.

Plans prevent upheaval brought about by staffing changes. …The fact that staff come and go has no effect on the accessibility or usability of that data. The knowledge about data management, organization, and archiving stays within the group. (19–20)

While Krier and Strasser are speaking specifically about research data, their arguments for these plans apply equally to metadata related to bibliographic or authority records. Without a plan on how to manage metadata, "…the varied data management practices that result from [an] ad hoc practice can create a lack of continuity and lead to missing or incomprehensible data when a research assistant [or staff member] leaves the project. Data is easier to retrieve and use, whoever produced it, when it is managed properly" (2014, 7).

Following the concepts supporting research data management (RDM), metadata management plans should include:

- **Sources** of metadata

- **Tools** used to process metadata

- **Organizing strategies** for metadata

In this chapter, I discuss these elements of the metadata management plan as related to records for resources acquired by the Murray State University (MSU) libraries. I cover where our record files come from and list additional record sources, the tools I use for managing metadata, principles for organizing files, and additional information helpful to managing the full metadata lifecycle. For each source of files, I record the metadata management plan in a document called the Procedure.

Sources of metadata

While metadata describing information resources can come in a variety of schemas (MARC, MODS, Dublin Core, XML, etc.), MSU uses only MARC records in our catalog. Most records are acquired through OCLC's WorldCat database. When we cannot find a record

in WorldCat, we create one that conforms to international cataloging standards and add it to the WorldCat database.

A second source of records is vendors. When records are acquired from vendors, the Procedure documents the URL or ftp address, login information, and contact information for the vendor representative. Two of our vendors provide records that require minimal processing. The other vendors' records vary in quality and completeness. Details about record quality are documented in the Procedure. Because of the variance in quality of vendor records, I determine on a vendor-by-vendor basis whether or not the records will be used or if each resource will be manually cataloged, and note it in the Procedure. Some factors informing that decision are how many records we are acquiring at one time, if we are acquiring them one-by-one or from a package, and if data points are provided that facilitate matching records in WorldCat using a batch search. The use cases below demonstrate these factors and the decisions I made regarding whether or not, and how, vendor records are used.

- Use case 1. The vendor provides WorldCat records for both print and electronic records. The records are high quality and require minimal processing. The vendor notifies us when new and changed records are available on a monthly basis. We download the records, import them into our library management system (LMS), and batch add our holdings to WorldCat.

- Use case 2. The vendor provides basic records for electronic resources including the URL for accessing the resource. These records are fairly accurate but do not include unique identifier numbers (OCNs) for WorldCat records. I download records several times a year from the vendor's website for new and deleted resources. Using batch searching capabilities in Connexion, OCLC's cataloging tool, I match WorldCat records and add holdings, process the records adding the URL, and then import them into our LMS. I batch delete deleted records from our LMS and capture the OCNs to batch delete those holdings from WorldCat.

While MSU does not use Z39.50, this is a very useful way of acquiring records for many libraries that cannot afford a WorldCat subscription. Z39.50 is an international communication protocol

that allows for searching library databases and retrieving records. Searching and exporting records is limited to one record at a time. Any cost is tied directly to staff time and internet usage, so it is essential that library databases selected for searching are vetted for their ability to provide the maximum number of records. A first choice would be a national library database, as they tend to make their catalogs available for searching via Z39.50 and have significant holdings. These include:

- Library of Congress (United States)

- Bibliothèque et Archives (Canada)

- Biblioteca Nacional de España (Spain)

- Deutsche Nationalbibliothek (Germany)

- Bibliothèque nationale de France

An additional choice for acquiring MARC records for theological and religious libraries is via library catalogs at institutions connected to religious studies and theology. Check with the libraries to determine if they have made their databases available for Z39.50 searching.

Some LMSs provide another way to access records for electronic resources. Utilizing a centralized knowledge base available to all libraries using a specific LMS, a library can activate records for resources, making them available for use. Availability and access are dependent upon the relationship of the LMS vendor with the resource vendor. The MSU libraries utilize the knowledge base associated with our LMS to activate records for electronic resources we either subscribe to or have available through a demand-driven acquisition plan, but not for purchased resources.

Another source of metadata for records is an institutional repository (IR) from which metadata can be harvested and converted to MARC records. Finally, we create brief records for resources that we do not lend. These records are for equipment that can be checked out such as cameras, laptops, and study room keys, and are either created manually or converted to MARC from a spreadsheet.

Tools

Website links to the resources listed below are included in Appendix 4A.

The basic tool necessary for working with MARC metadata is the LMS. These systems vary in capability and facility for editing bibliographic records. When a group of records is acquired, many of the changes that need to be made to one record need to be made to many records in the group. One tool that I use for batch editing thousands of records at a time is MarcEdit. In addition to bulk editing MARC records, it can convert other schemas and data in spreadsheets to MARC. This tool is very powerful, has incredible functionality, and is free. Its creator, Terry Reese, is continually updating the tool with new functionality. He has provided documentation and YouTube videos to help you learn how to use it.

Another tool recently added to my cataloging toolbox is ChatGPT for creating tables of contents notes. Any AI tool for text generation can likely be used for this purpose. The challenge is developing a set of prompts to get results that require only minimal manual adjustments. This tool has the potential to save a significant amount of time and minimize inputting errors.

Included in the Procedure for each vendor is a list of edits to make to their records. These are considered guidelines as each file should be assessed for necessary edits due to changes vendors make in their metadata processes. Past practices do not always carry forward from file to file as vendors respond to customer feedback and changes in cataloging standards.

In addition to batch editing tools, cataloging tools for description, classification, subject analysis, and configuration within the MARC schema are necessary. Many are available freely on the internet; some require a subscription fee. Resource Description & Access (RDA) guidelines are the most current international descriptive cataloging guidelines and are available through the RDA Toolkit for an annual subscription fee based on the number of concurrent users. The Toolkit is used in conjunction with the RDA Registry, a free resource that "contains linked data and Semantic Web representations of the entities, elements, and terminologies approved by the RDA Steering Committee" (American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals 2024). The concepts underlying the RDA

guidelines are challenging to understand, and there is a steep learning curve associated with using the Toolkit. To help with this, the Program for Cooperative Cataloging (PCC) developed training for using this resource. Tools for help with the MARC schema include MARC21 Format for Bibliographic Data and OCLC's Bibliographic Formats and Standards, both freely available.

The main subject heading thesaurus is *Library of Congress Subject Headings* (LCSH). These headings can be found in downloadable PDFs or in a searchable database. This database also includes authorized headings for names, titles, genre terms, and more. When using this database, it is important to understand that unauthorized headings are also indexed. Their presence in the database does not indicate that they are the authorized term. To inform your usage of the terms in this database, identify the thesaurus from which the term is obtained, understand the structure of narrower and broader terms as well as "see" and "see also" references, recognize the 1XX tag used, and read scope notes. Buttons on the main page and inside the database for help for a specific page are invaluable.

In addition to this authority database, the Library of Congress has also provided access to another database of searchable ontologies and controlled vocabularies called *id.loc.gov*, in which LCSH and name authorities, genre terms, relators, and RDA terminology can be searched. This service intends to provide uniform resource identifiers (URI) for use in linked data and it is freely available. PDFs of the Library of Congress' Subject Heading Manual are available for help in building subject heading strings through the use of subdivisions and pairing headings to best reflect the topic of the resource.

The two main classification systems used by libraries are the Library of Congress Classification System (LCC) and the Dewey Decimal System (DDC). The LCC is available in PDFs, searchable through *id.loc.gov* and The Cataloging Calculator, and can be accessed by subscription through Classification Web. The DDC is owned by OCLC and can be accessed through a subscription to the WebDewey database.

Finally, The Cataloging Calculator is a free resource that provides searching of LCSH, LCC, standard subdivisions, and several other cataloging resources. Additionally, geographic and LC Cutters can be easily calculated using this tool.

Organizing strategies

Once you have determined the source of your records, what editing is needed, and how the editing will happen, it is time to design a plan for organizing the record files. Whether downloading files to an individual's computer if they are the only ones who need access to them, or to a networked folder if more than one person needs to access them, it is crucial that the file naming convention be shared with, understood, and implemented by each person accessing them.

Because our library receives MARC records for a variety of projects, the initial organization of computer folders is by project. For projects that acquire MARC records from multiple vendors, I create folders for each vendor. Within each vendor or project folder, I include a Procedure document and any other documentation associated with the vendor such as vendor-specific access and editing requirements, licenses, and technical specifications.

I then create an additional folder for records. This provides a dedicated area in which I can organize the various record files as I work through the editing process. This folder contains a document for keeping notes to track the editing progress and problems encountered for follow-up. This document is extremely helpful for keeping me on track in the event of interruptions. I include chain of custody information such as the date and initials of who updated the file. Finally, if it is important to archive old files, I add an archive folder and move the files I wish to retain to that folder to make the records folder available for the next load of records.

Downloaded files will have a vendor-supplied name and, depending on how informative that name is, you may want to keep it. More likely, you'll want to determine a naming convention by considering who will access the files and what information needs to be conveyed by the name. Computer scientists have determined best practices for naming versions of files, and a quick internet search results in a slew of resources on file naming conventions. Some of the main considerations are:

- Use a unique and descriptive identifier. Keep the name short and easy to understand. Since files are sorted by the first few elements, start with more general components and move to more specific ones.

- Avoid special characters and spaces. The only non-alphabetic and non-numeric characters that should be used in file naming are hyphens (-) and underscores (_). Avoid using spaces. While some recommend not using capital letters for consistency, it can be helpful to use them when identifying the beginning of a new word.

- Numbering. Use leading zeros in numbering for the computer to sort sequentially. Additionally, when using dates, use the format YYYYMMDD.

- Version control. Whether it is a file of MARC records or a spreadsheet of data, always keep the original file unchanged. When saving each edited version, add the letter v and a number to the end of the file name, e.g. v01, v02, etc. Resist using the word "final" as the inevitable need to edit the final version might result in some odd naming contortions to distinguish the different "final" versions.

Finally, include in the Procedure information about the lifecycle of the files. The determination of how long to keep metadata files is often based on the project, the comfort level of those who work with the files, and computer storage space. Once MARC files are imported into our LMS, we delete most of them from the computer. Some files are kept until the next batch is run as a way of documenting when they were last processed. Some spreadsheets that document decisions are kept long-term in the event they need to be referenced later. Reasons for archiving metadata should be documented in the Procedure and the decision reviewed periodically.

Conclusion

Managing metadata can sometimes be confusing and chaotic with numerous files and versions of files, multiple vendors, a variety of workflows, and various procedures to keep track of and implement. However, by utilizing some documentation practices and organizing strategies, managing metadata can become much more manageable. By developing a metadata management plan for each source of files, documenting that plan, and assigning a meaningful name to the files, I have a tidier list of files, I know what needs to be done with them

and how often, and, most importantly, our users have timelier access to resources available from the MSU library.

References

Krier, Laura and Carly A. Strasser. 2014. *Data Management for Libraries.* Chicago: ALA TechSource.

American Library Association, Canadian Federation of Library Associations, and CILIP: Chartered Institute of Library and Information Professionals. 2024. "RDA Registry." Accessed May 29, 2024. *https://www.rdaregistry.info/*.

Appendix 4A: Links to Resources and Tools

Cataloging tools:

Bibliographic Formats and Standards: *https://www.oclc.org/bibformats/en/home.html*

Classification Web: *https://classweb.org/*

id.loc.gov Linked Data Service: *https://id.loc.gov/*

Library of Congress Authorities: *https://authorities.loc.gov/*

Library of Congress Classification: *https://www.loc.gov/catdir/cpso/lcco/*

Library of Congress Subject Headings: *https://www.loc.gov/aba/publications/FreeLCSH/freelcsh.html#About*

MARC Format for Bibliographic Data: *https://www.loc.gov/marc/bibliographic/*

RDA Registry: *https://www.rdaregistry.info/*

RDA Toolkit: *https://www.rdatoolkit.org/*

Subject Heading Manual: *https://www.loc.gov/aba/publications/FreeSHM/freeshm.html*

The Cataloging Calculator: *https://calculate.banerjee.site/*

WebDewey: *https://dewey.org/webdewey/login/login.html*

Editing tools:

ChatGPT: *https://chatgpt.com/*

MarcEdit: *https://marcedit.reeset.net/*

Tutorials:

MarcEdit tutorials: *https://www.youtube.com/@tpreese*

PCC Introductory RDA Training: *https://www.loc.gov/catworkshop/rda/index.html*

Using Qualitative Data to Manage and Improve Theological Libraries

TIMOTHY D. LINCOLN

*A*theological library exists to serve a specific group of patrons, typically the students and faculty of a particular seminary, school, or the members of a religious community. Managers of theological libraries want to meet the information needs of their patrons as well as possible. In order to understand these needs, managers try to find out what user needs are and what aspects of library services might frustrate or empower users during their research. Armed with such information, a library manager is able to make a reasoned argument for changing some aspect of the library operations, such as adjusting hours of service or for requesting more funds from school leaders. This chapter describes how library managers can collect and use qualitative data to support efforts to improve library services.

The chapter first explains the distinction between quantitative data (typically derived by counting events, participants, or

transactions) and qualitative data (words and images used to describe the texture and impact of experiences). Second, managers learn how qualitative data can communicate the emotional impact of library services as a kind of storytelling. Third, the chapter introduces interviews and the gathering of testimonials as pertinent methods to collect qualitative data. Fourth, the chapter links qualitative data (stories and testimonials) to managers' requests for the resources needed by theological libraries and the management of staff. A list of resources for further reading is provided at the end of the chapter.

Quantitative and Qualitative Data

Social scientists divide data about their object of study (for instance, the workings of a library) into two broad categories. Quantitative data is information that can be summarized and manipulated using mathematical or statistical tools. In other words, such data begins as numerical counts. For instance, by counting the number of library books checked out during an academic year, a librarian can calculate descriptive statistics like the total number of books circulated, the average number of books checked out per week, or the average number of books checked out per student. Integrated library systems and database vendors collect such counts (for instance, which online journals were used most frequently by patrons) without explicit human intervention. Answers to survey questions about activity (e.g., how many times did you visit the library building last week?) are also quantitative data.

By contrast, qualitative data begins as observations, interviews, or answers to open-ended questions. Qualitative data values human experience and wants to understand those experiences in all of their texture and variety. Qualitative questions about library services for a specific library might include:

- Most of the time, what motivates you to use library services?

- How easy or difficult is it for you to use the library catalog? Why?

- Please provide an example of a library staff member helping you.

- Do you have a favorite place in the library, and why?

- (For faculty) What parts of library services might be improved to help you instruct students better?

It requires more human effort to collect and tabulate qualitative data than to collect quantitative data. For instance, if a librarian wants to interview a group of students to learn how they search for information, the librarian needs to schedule a meeting, issue invitations, and decide how to capture student comments. By contrast, usage counts of database searches, journal article downloads, or books checked out by patrons may be automatically generated by library software.

Quantitative and qualitative data both help library managers understand how patrons use library services and where areas of improvement might lie. Standard library reports, such as those sent to accrediting agencies, frequently ask only for quantitative data (how many faculty do you serve? How many information literacy presentations were made last year?). Qualitative data supplements simple counts and helps to show librarians and other stakeholders the complexity of library services and their value to patrons.

Communicating the Value of the Library through Storytelling

How can library managers explain the benefits of library services to a board of directors, skeptical students, or school leaders who control the budget? One way is through nonfiction stories about library usage. By story, I simply mean examples of user experiences and opinions collected by an interviewer. Just as a journalist interviews many individuals and then writes a story that is faithful to the facts, a library manager can also use stories collected from library patrons to make a case for the value of the library. Well-told stories capture and retain our attention. Vora notes that "data when converted into stories generates emotions . . . which park such data events in the audience's long-term memory while also increasing their inclination towards a recommended decision or action" (2019, 17). Of course, interviewees tell stories for a variety of reasons. Researchers need to discern when they "suspect that we are being told apocryphal tales"

(Barbour 2008, 124). Stories of user success can communicate the library's value to other administrators in the school.

Sometimes the stories collected from patrons may point to problems experienced by library users. In a recent library questionnaire, the author asked an open-ended final question: "Is there anything else that you would like to comment on?" Several students indicated that they had experienced problems using an access code to be able to enter the building during evenings and weekends. Asking open-ended written questions provided library patrons an anonymous and safe space to express frustration—and helped staff make sure that all students had the correct access code.

Methods of Collecting Qualitative Data

Many books explain specific methods for collecting qualitative data. See the end of this chapter for some suggestions. Some of these methods are underpinned by theories and ideological commitments, such as feminism or phenomenology (Brisolara, Seigert, and SenGupta 2014; Creswell 2007). Two methods of collecting qualitative data pertinent to theological libraries are interviewing and collecting testimonials. These methods can produce reliable data for managers through the use of consistent procedures.

First, interviewing is a structured way of asking library patrons about their experiences seeking information or using a library. The results of interviews (whether detailed notes or recordings) count as qualitative data when the researcher/interviewer follows consistent procedures that allow interviewees to express themselves freely. When analyzing interviews, researchers should exercise discipline when interpreting the words of interviewees so that resulting summaries or reports accurately capture the most frequently expressed views (even if they are contradictory) and the full range of opinions expressed. Researchers should not focus only on what they may have hoped to hear. To collect good data, a researcher creates an interview protocol used for all interviews. The protocol briefly explains why the researcher is conducting the interview and a set of questions. It is good practice to ask open-ended questions ("tell me about the last time you asked library staff for help" is better than a binary question like "the last time you asked a staff member for help, were you satisfied?"). Another form of interviewing is a group interview, also

called a focus group. In such groups, the researcher asks questions to an entire group of people who are knowledgeable on subjects that the researcher cares about. For instance, a researcher might invite a group of local ministers who use a library to learn more about their reasons for visiting and which resources they use. Focus groups can provide rich data, in part because the ideas voiced by one participant spark comments by others in the group. Leading focus groups can be challenging. In contrast to individual interviews, the researcher needs to lead discussions to enable all those in attendance to participate and to ask all pertinent questions within a limited amount of time.

A second method is collecting testimonials. In contrast to an interview (which happens synchronously with the possibility of asking follow-up questions), a testimonial is a written response to questions of interest to the librarian researchers. For instance, as the COVID-19 pandemic lessened and libraries reopened to patrons, the author asked students for written answers to a few questions about their recent experiences with library services. One was: "What did you miss the most about visiting the library during the COVID-19 pandemic?" There was a wide variety of answers. One student said they missed "a place to retreat from the world and rest among the books." Such testimonials help explain to school leaders the value of a library building as a place. Conducting a face-to-face interview no doubt has greater promise to discover the texture of experiences using a library than answering a written question or two. It can be challenging to schedule in-person interviews. On the other hand, patrons can provide testimonials at their convenience. For instance, patrons may answer a question posed in an email, or a print questionnaire available at the library service desk.

Both testimonials and notes or transcriptions of interviews provide vivid first-person stories about real people using a theological library. After collecting these words, the researcher makes sense of them in a two-step process. First, the librarian looks for the themes (repeated topics or ideas) expressed by participants. Social scientists call this process coding. When coding, the researcher notices repeated words or ideas in the data set (i.e., the transcripts) that belong together. Coding allows a librarian, for instance, to summarize words spoken by several interviewees under a common heading. Coding does not require software. A librarian may mark sections of transcripts with a symbol or colored pen to indicate that a set of words belongs to a theme. The second step in making sense of data

is thinking about why people said what they said. To put it another way, what do these data mean? Understanding both what patrons say about library services (data) and why they think that way (an explanation or theory) are foundational steps needed before using qualitative data to make decisions about improving library services.

Using Qualitative Data to Help Manage

If qualitative data are collected to support the management of a library rather than because of academic interest, then the manager needs to use the data for management purposes, such as to help inform stakeholders or make decisions. For instance, an annual report by the library director to their supervisor or board can become more impactful by sharing stories of how the library served patrons. Stories make more emotional connections with readers than simply reporting a quantitative statistic like "when asked about satisfaction with library services, 80 percent of patrons said they were satisfied or very satisfied." Adding a quotation from a satisfied patron, like "I didn't know where to start finding sources for my ethics paper, but a librarian suggested some sources for me to read," shows how the library positively impacted patrons better than a report that cites only numbers.

Qualitative data can also help managers discover the sources of changed patron behavior. For instance, imagine a case in which a theological librarian notices that the number of reference questions answered (as counted by staff) drops markedly below typical levels. There might be several explanations for this drop. Asking patrons about their use of this service via interviewing, (a qualitative data collection method) could reveal reasons that the library manager might be able to address. If patrons reported, hypothetically, that they ask fewer reference questions than in the past because the staff acts as if it is a bother to speak with patrons, then a librarian can use this new information to talk to staff members about their roles. If patrons reported instead that the library has become so hot that it is an uncomfortable place for study, then the librarian can conclude that the difficulty is not due to staff behavior, but because of the limitations of the heating and ventilation system. Qualitative data can lead a manager to explore the reasons for changes in countable behaviors (quantitative data).

Librarians may also use qualitative methods to support the work of inclusion and anti-racism. Rebecca Donald explored the experiences of students of color at Trinity International University with the goal of making the library more welcoming. In response to findings, the library has intentionally mounted displays showing different cultures and continues collecting books addressing race and culture issues (Donald 2021).

Additionally, managers can use qualitative data to encourage library staff during performance reviews. Staff members appreciate being praised for the quality of their work. A patron testimonial like "the reference librarian was always patient with me" supplements numeric summaries such as "80 percent of patrons reported their level of satisfaction with reference services as satisfied or very satisfied." Testimonial comments may also be used in reports to communicate the impact of library services to other school staff members.

To summarize, library managers benefit from collecting and analyzing both quantitative and qualitative data. Reports using quantitative data communicate well to readers who value productivity and numerical precision. Reports using qualitative data communicate well to readers who focus on the human dimensions and impact of library services. Theological librarians can seek out individual testimonials and conduct interviews to collect nuanced stories about how their patrons use and value the theological library. These stories can communicate the library's value to stakeholders and help librarians change services to meet patron needs.

Resources

Many resources describe the procedures for collecting and coding qualitative data, such as Aurini, Heath, and Howells (2022), and Barbour (2008). Open access resources include Lincoln (2021), which discusses individual interviews, group interviews, and coding, and Edwards and Holland (2013), which focuses on interviewing. Donald's article (2021) includes examples of open-ended interview questions. For librarians interested in group interviewing, open access resources by Krueger (2002) and The National Association of Citizens Advice Bureaux (2015) describe how to run focus groups and interpret the data collected from them.

References

Aurini, Janice, Melanie Heath, and Stephanie Howells. 2022. *The How to of Qualitative Research*, 2nd ed. Thousand Oaks, CA: Sage.

Barbour, Rosaline. 2008. *Introducing Qualitative Research: A Student Guide to the Craft of Doing Qualitative Research.* Los Angeles: Sage.

Brisolara, Sharon, Denise Seigert, and Saumitra SenGupta, eds. 2014. *Feminist Evaluation and Research: Theory and Practice.* New York: Guilford.

Creswell, John W. 2007. *Qualitative Inquiry & Research Design*, 2nd ed. Thousand Oaks CA: Sage Publications.

Donald, Rebecca. 2021. "Building Trust: How Understanding Users Can Lead to Inclusive and Equitable Library Services Interviews with Students of Color." *ATLA Summary of Proceedings* 75 (2021): 196–203. *https://doi.org/10.31046/proceedings.2021.2945*.

Edwards, Rosiland, and Janet Holland. 2013. *What Is Qualitative Interviewing?* London: Bloomsbury Academic. *https://directory.doabooks.org/handle/20.500.12854/92684*.

Krueger, Richard A. 2002. *Designing and Conducting Focus Group Interviews. https://www.eiu.edu/ihec/Krueger-FocusGroupInterviews.pdf*.

Lincoln, Timothy D. 2021. *Qualitative Research: A Field Manual for Ministry Students*. Chicago: Atla Open Press. *https://doi.org/10.31046/atlaopenpress.24*.

The National Association of Citizens Advice Bureaux (UK). 2015. *How to Run Focus Groups. https://www.citizensadvice.org.uk/Global/CitizensAdvice/Equalities/How%20to%20run%20focus%20groups%20guide.pdf*.

Vora, Sejal. 2019. *The Power of Data Storytelling.* New Delhi: Sage.

Counting Our Blessings

Inventory of a Roman Catholic Seminary Library

TAMARA A. CONLEY

*T*he presence or absence of items in a library collection and the accuracy of the catalog compel library managers to conduct regular inventory. Inventory involves almost every library function—management, circulation, acquisitions, cataloging, reference, special collections, collection development, repair, and shelving. Therefore, inventory affects the library staff, patrons, and related groups such as administration and faculty in an academic institution.

Inventory management requires attentiveness to the individual item and a corresponding overall collection viewpoint. Project managers must be able to respond to both the details and the greater institutional demands. This chapter will use basic project management principles and steps to explain the inventory process at the Cardinal Stafford Library.

The Cardinal Stafford Library is the library of St. John Vianney Theological Seminary (SJVTS), which is a major seminary serving the Roman Catholic tradition for the Archdiocese of Denver in Colorado. The Seminary also receives men from 13 other dioceses and several religious orders. The primary patron base is about 120 seminarians in formation to become ordained priests in addition to faculty. At the time of this writing, the library also served a graduate school of theology for lay people called the Augustine Institute. The Saint Francis School for Deacons, a division of SJVTS forming men for the permanent diaconate, also has access to library resources. In addition, SJVTS has a lay division with educational programs such as the Catholic Biblical School and the Catechetical School.

The Cardinal Stafford Library has over 173,000 items in its collection as of October 2024. The collection is classified using the Library of Congress system. To date, the library has completed six inventories of the entire collection. The first two inventories used the SirsiDynix Symphony integrated library system (ILS). Following a migration to OCLC's WorldShare Management Services (WMS), the inventory from 2017 onward has happened in this ILS.

Project Management and the Library Inventory Process

Library inventory serves many purposes. First, inventory supports the mission of the library and its overall institution (Henry, Longstaff, and Van Kampen 2008, 113). For example, if an institution's mission is to prepare men for the Roman Catholic priesthood, inventory would contribute to that mission by having an accurate record of the books available to those men as they study and prepare. The more accurate the library's catalog, the better it reflects the collection. An accurate catalog contributes to confidence in the overall library, staff, collection, and services (Sung, Whistler, and Sung, 2009, 323; Xu 2018, 44). It shows care of the collection, which transfers to care of its patrons and the larger community or institution (Braxton 2005; Sung, Whistler, and Sung, 2009, 314).

Another purpose of the inventory process is to review subject areas that have increased or decreased by the number of volumes in the collection. This is achieved not only by visual assessment of the

materials on the shelves but also by various reports of withdrawn items and newly added items. Shifting is often an indicator of this type of collection information. Additional purposes of inventory include assessing areas for shifting, growth, or weeding (Braxton 2005).

As library staff members assess collection and shelf space along with inventory, they increase their awareness of the condition of the collection. Physically placing hands on the items in the collection, book by book, shelf by shelf, produces greater familiarity with the collection. The time spent physically in the stacks is a byproduct of collection maintenance (Braxton 2005).

Another benefit of inventory is that library holdings are confirmed for insurance purposes. Library disasters remind library directors that an accurate record of their stacks is crucial if items are lost or damaged due to theft, floods, or fires. Claims can be supported with a recent inventory (Oehlerts 2009, 73).

Finally, inventory contributes to the story of the library. Each inventory event will bring to light parts of the collection or individual items that are unusual, important, or special.

Basic Project Management Steps

Pre-Project Planning

The first step is to gather information about the project. Knowledge of the current state of the collection and when the last inventory was completed, if at all, will be the basis of many decisions by the project manager (Perera 2023, 21). The project manager should consider whether this inventory will be partial or full (meaning one part of the collection, a sample, or the entire collection). Possible dates for conducting inventory should be studied. For example, an academic library may use summer break for this purpose. At the Cardinal Stafford Library, inventory has been started on smaller parts of the collection in March, and the main stacks have been inventoried during summer break.

Library inventory policies will be the foundation for project management decisions. Policies are made by the library director with the approval of the administration of the institution and any relevant committees (academic council, library committee, etc.).

Library inventory policies should work with any existing policies of the larger institution. Considerations could include frequency, type, whether to be open to circulation or patrons, and what to do with the information.

A library inventory policy may include frequency of inventory or schedule. For example, ongoing inventory is usually done anytime a staff member has contact with an item. Annual inventories of an entire collection may be easily conducted on smaller collections. Other intervals may also be selected based on a variety of factors. For example, every other summer may be a good choice for an academic library when the students and faculty are not in classes or on campus. Frequency can also increase or decrease for a particular part of the collection. For example, if a library has relocated a rare books collection, the staff would conduct a pre-move and post-move inventory to ensure that all items were relocated successfully.

The process and procedures followed for inventory also depend on the cataloging system used. The ILS used by the library will have a process for electronically marking individual items as inventoried. For example, OCLC's WMS product uses regular item barcode scanning in the Check In function. Other systems require a scanner that stores barcodes, which are uploaded later to the ILS. A printed list is also an option if your chosen collection is small or there would be difficulty in using a barcode scanner or laptop.

Other decisions to make are related to the practical aspects of drawing resources to conduct inventory. Closing the library, stacks, or certain areas of your collection during inventory could make the process easier and faster. An important consideration is that closing could be inconvenient to patrons. If closing is selected, other options may be offered to serve patrons—for example, some limited hours, extended holds, or longer checkout times. Consider the ability and availability of staff or volunteers working on inventory and the other responsibilities and tasks they may have to handle. If closing for a few weeks allows staff to focus and complete inventory, then it could be the most effective option.

The personnel needed to complete inventory depends on the scale and type of inventory. Consider that the staff may be using stepladders, reaching up or down, carrying heavy books, and repetitively pressing a scanner. Inventory tasks can be physically demanding, especially over long periods of time. Staff members may have to adjust their workday to add time for inventory. Consider the tasks that may be deferred during this time. Plan accordingly if overtime

is required of your staff. Volunteers may not be able to commit to the time needed to complete an inventory. Volunteers are unpaid so the budget would be unaffected. Some volunteers are unskilled and may require more supervision. In academic libraries, students are sometimes recruited for inventory. Students may be similar to volunteers in skill level but may be paid. Most students can be flexible with schedules and may be physically able to handle the work (Perera, 2023).

Another practical consideration is weeding or deaccessioning items from the collection. Weeding can take place before inventory to reduce the number of items inventoried. Weeding before inventory can also make room for shifting. Weeding after inventory may allow more time to assess whether an item should be removed.

Shifting can also take place either before or after inventory. Shifting before inventory may be helpful because tight areas can be hard to scan or reach easily. Shifting after inventory can be saved for areas that are lower priority.

The facts gathered during this crucial stage should lead to possible outcomes. Outcomes or deliverables will help to plan the budget, staff, and schedule (Perera 2023, 27–28). For example, if the expected outcomes include significant book repair and replacement, the budget should include repair supplies, bindery costs, and replacement tasks and costs (Perera 2023, 21). For example, the outcomes for the first inventory in 2012 at the Cardinal Stafford Library were dusting the books and shelves, repair, and catalog reconciliation.

After the initial information gathering, all inventory activities should be defined. For example, in 2017, we planned to use our new ILS to conduct a full inventory from March until July. Inventory scanning would be conducted by two members of the staff with support from the cataloger. Laptops with scanners were prepared. Staff members were assigned call number ranges. Inventory anomalies went to the cataloger for corrections. After gathering information from previous inventories, these decisions were made in the fall semester.

The appropriate authorities should be consulted for approval as soon as the preliminary plan has been created. For our six inventories, the seminary administration has approved the inventory projects at the fall semester library committee meeting, with the final approvals of the academic dean and rector.

One area of concern within the field of project management is scope creep. Scope creep is when work that was not included in the original plan is added (Searcy 2018, 103). This can be expensive and

have financial or staff time or resource implications. Avoiding scope creep happens in the pre-project planning process by gathering as much information as possible and then making firm decisions about the work to be done (Searcy 2018, 102).

Communication is the responsibility of the project manager during all phases, and especially during pre-project planning. At SJVTS, inventory dates, locations, and other details were provided to faculty, seminarians, and other patrons. Email and word of mouth were our small community's primary means of communication.

Project Planning

At this stage, the project plan should be prepared by the project manager listing activities and milestones. The project plan should document how to accomplish inventory (workflow), who will perform the inventory (team), and when the inventory will be accomplished (schedule with milestones; Perera 2023, 22). A Gantt chart, software, or online planning websites are options to create a project plan. Many options are free or inexpensive. A project planning tool should be compatible with the inventory budget and scale. Updating this information and communicating it will be essential throughout the project.

The project manager will share the project plan with the team and other relevant parties, such as supervisors or administration. Depending on the level of information needed by the various parties, the appropriate information should be made available. For example, the team scanning books for inventory needs the workflow and schedule.

Implementation

As the inventory proceeds, the project manager will monitor the inventory workflow; maintain the schedule, budget, and staffing; and communicate with the relevant people or groups. Implementation will include changes, working with reports, consideration of electronic resources and special collections, as well as budget.

The project manager should handle changes to the project, updates, achieving milestones, and setbacks with clear communication with the affected people. For example, a shelf unit was

discovered to be leaning during one inventory. The inventory in that call number range was halted while the facilities manager and library director conferred on the issue. The team was able to move to another section without impacting the budget or schedule negatively. Communication was critical while updates to the plan were made so that workers were able to continue inventory safely.

Before the first book is scanned, the project manager should provide a report or list that includes the items in the collection or section to be inventoried. The list should include as much information about the individual items as possible. Sorting data from a report should allow for separating by date inventoried, item location, status, or other information that is relevant to a particular inventory. Spreadsheet software is usually used for this purpose. Reports may be able to be run at various intervals based on the other facets of the inventory conducted. Changes to the catalog may be made based on the results of the report and the process of reconciling the report with the collection. Results of reports also show where budgets have been spent or where they need to be spent in the following fiscal year. Inventory ensures that there is proof of the need for repair, replacement, acquisition, or deaccessioning (Braxton 2005, 53).

An inventory project plan may include electronic, digital, or multimedia types of resources such as CDs or DVDs. Patrons and staff may be confused or frustrated by broken links or inaccurate records. Website cleanup could be considered part of this process. Inventory can be a time to evaluate whether you can or want to create or absorb a special collection. Inventory of special collections helps to ensure that all items that belong in a particular collection are in the right location.

Another important consideration in the implementation phase is the execution of a planned budget for the inventory. Personnel, supplies and equipment, and collection maintenance are a few of the items that a project manager may consider for the inventory budget (Searcy 2018).

Thinking about areas of concern can span the entirety of the project. Budget and scheduling issues arise from scope creep and lack of information during the pre-project planning stage (Searcy 2018; ALCTS 2019). Project managers can reduce the impact of budget and scheduling problems by remaining firm in the project plan and discussing solutions with other decision-makers. (Searcy 2018, 103).

As the end of the project nears, a meeting should be held to discuss lessons learned and future tasks. Inventory often leads to other

projects such as large-scale shifting, weeding, acquisitions, or cataloging changes.

Communications

Throughout the project management process for inventory, communication has been discussed. All aspects of the project require communication with specific groups or individuals. The project manager is responsible for communication with the team, decision-makers, and patrons. The project manager expects to share the schedule, workflow, and other relevant details with the team conducting inventory (Searcy 2018; Perera 2023, 28). Decision makers may expect to view the schedule, budget, and outcomes from the inventory process. This may be in the final report. Patrons should expect to receive information as it pertains to accessibility to the collection, the staff, and the library facility. Websites, emails, and other methods of reaching the patron base should be employed to share these messages. Regular updates to all parties of progress or changes are important. The conclusion of the inventory should be communicated to relevant groups. Outcomes and next steps should be presented to decision-makers (Perera 2023).

Conclusion

Inventory at any library requires project management principles and practices. In the presented SJVTS case study, it was crucial to keep in mind library staff, patrons, and related groups when considering the impact of the project from pre-project planning to plan execution, implementation, and its implications, to closing the process in advance of the next inventory.

Inventories conducted within a project management framework may benefit from organizational and communication elements. Basic project management steps, budget, communication, and areas of concern apply to library inventory. Project managers must be able to respond to the details of a project and the greater institutional demands.

References

ALCTS. 2019. "Library Project Management 101." Archived February 29, 2024 at *https://web.archive.org/web/20240229061403/https://www.ala.org/alcts/library-project-management-101*.

Braxton, Barbara. 2005. "Inventory: 26 Reasons for Doing One." *Teacher Librarian* 32, no. 4: 52–53.

Henry, Elizabeth, Rachel Longstaff, and Doris Van Kampen. 2008. "Collection Analysis Outcomes in an Academic Library." *Collection Building* 27, 3: 113–17.

Oehlerts, Beth. 2009. "Inventory: Risk Identification and More." *Library and Archival Security* 22, no. 2: 73–83.

Perera, Treshani. 2023. "Project Management Strategies for Managing Metadata in Institutional Recordings Collections – A Case Study." *Music Reference Services Quarterly* 26, no. 1: 15–36.

Searcy, Carly Wiggins. 2018. *Project Management in Libraries: On Time, On Budget, On Target*. Chicago: ALA Editions.

Sung, Jan S., John A. Whistler, and Nackil Sung. 2009. "A Cost-Benefit Analysis of a Collections Inventory Project: A Statistical Analysis of Inventory Data from a Medium-Sized Academic Library." *The Journal of Academic Librarianship* 35, no. 4: 314–23.

Xu, Gordon F. 2018. "A Best Practice of Book Inventory Project at a Medium-Sized Academic Library: How to Choose Hand-Held Inventory Devices and Handle Inventory Exceptions." *Technical Services Quarterly* 35, no. 1: 42–67.

Further Reading

Alvin, Glenda. 2016. "Collection Management Matters – Facing the Ugly Truth: Inventory." *Against the Grain* 28, no. 1: 62.

Buda, Maria, and Helen He. 2012. "Collection Inventory in a Canadian Academic Dentistry Library." J*ournal of the Canadian Health Libraries Association* 33: 123–26.

Cooperman, Larry. 2015. *Managing the One-Person Library.* Waltham, MA: Chandos.

El Rayess, Maroun. 2015. "A Quick, Accurate, and Free-of-Cost Inventory and Shelf-Reading Solution." *Journal of Access Services* 12: 104–17.

Ernick, Linda. 2005. "Notes on Operations: Floating Bibs and Orphan Bar Codes: Benefits of an Inventory at a Small College." *Library Resources and Technical Services* 49 (3): 210–16.

Greenwood, Judy T. 2013. "Taking It to the Stacks: An Inventory Project at the University of Mississippi Libraries." *Journal of Access Services* 10: 77–89.

Guimaraes, Anastasia, Lea Briggs, Kirsten Clark, Wendy Tressler Jasper, and Zheng (John) Wang. 2021. "State of Project Management in Libraries." *Journal of Library Administration* 61, no. 6: 644–58.

Harveland, Jennifer. 2017. "Library Inventory Methods: Using Flexibility and Creativity to Achieve a Common Goal within a Federated Library System." *Collaborative Librarianship* 9, no. 3: 168–74.

Loesch, Martha Fallahay. 2011. "Inventory Redux: A Twenty-first Century Adaptation." *Technical Services Quarterly* 28, no. 3: 301–11.

Mahard, Martha. 2018. "An Unparalleled Opportunity: Creating an Inventory of the Print Collection at the Boston Public Library." *Art Documentation: Journal of the Art Libraries Society of America* 37, no. 1: 55–70.

Mays, Dorothy A. 2013. "The Critical Path for Middle Managers: A Project Management Technique for Librarians." In *Managing in the Middle: The Librarian's Handbook*, edited by Robert Farrell and Kenneth Schlesinger, p. 71-74. Chicago: ALA Editions.

Shouse, Daniel, and Linda Teel. 2006. "Inventory: Catalyst for Collection Development." *Collection Building* 24, no. 4: 129–33.

Stewart-Mailhiot, Amy. 2015. "Project Management: Moving Beyond MacGyver." *Reference and User Services Quarterly* 55, no. 1: 18–20.

Stueart, Robert D., and Maureen Sullivan. 2010. *Developing Library Leaders*. New York: Neal-Schuman.

Teel, Linda M. 2008. "Applying the Basics to Improve the Collection." *Collection Building* 27, no. 3: 96–103.

Walden, Pam, Margaret Donnelly, and Cheryl Otterbein. 2011. "How to Inventory a Small Library." *Feliciter* 57, no. 2: 62–64.

Walker, Stephen, and Jennifer Poggiali. 2020. "Lost But Not Forgotten? An Inventory and Use Analysis of an Undergraduate Art Book Collection." *Art Documentation: Journal of the Art Libraries Society of America* 39, no. 1: 102–13.

Wamsley, Lori H. 2009. "Controlling Project Chaos: Project Management for Library Staff." *PNLA Quarterly* 73, no. 2: 5–6, 27.

Winston, Mark D., and Tara Hoffman. 2005. "Project Management in Libraries." *Journal of Library Administration* 42, no. 1: 51–61.

Personnel

Balancing Efficiency and Service

Managing a 4-Day Work Week Model in a Small Theological Library

VICTORIA TSONOS

*I*n recent years, there has been a significant increase in the adaptation of flexible work arrangements to account for societal, economic, and industry changes. Telework, flexible hours, and alternative workloads have all been introduced across multiple industries (Vidat 2023). One of these new alternative work arrangements that has become increasingly popular in recent years is the concept of a 4-day work week. The 4-day work week model has been presented as a potential solution to improve work–life balance, enhance productivity, and promote overall well-being among employees. This work model challenges the traditional 5-day work week, proposing that reducing the number of days spent at work can significantly benefit workers and employers.

There are two different models for the 4-day work week; the first reduces the work week from five to four days but with the same number of hours in a week. The second model reduces both the number

of days and the number of hours in the work week. An example of the difference between the two would be a 4-day, 40-hour work week during which an employee works 10-hour days, versus a 4-day, 32-hour work week, during which an employee maintains the traditional 8-hour workday. Both models retain the same level of pay/salary for employees as if they worked a typical 5-day work week. Studies suggest that the 4-day work week model presents many benefits, such as a healthier work–life balance and flexibility, higher employee retention rates, increases in efficiency and productivity, and an increase in overall well-being (Bersin 2023; Moen and Chu 2023; Wadsworth and Facer 2016).

The 4-day compressed work week has been introduced by various employers, such as Microsoft Japan and Utah state-affiliated employers. Both Microsoft and Utah state initially implemented pilot projects and found that this alternative work model increased productivity and lowered absenteeism, while the employees reported better work–life balance and improved employee satisfaction (Vidat 2023; Wadsworth and Facer 2016). While remote and hybrid work models have become increasingly popular since the COVID-19 pandemic, there are still many jobs where remote or hybrid work models do not work but could successfully implement a 4-day work week model for all employees (Moen and Chu 2023).

However, there are many challenges and implications to consider when implementing an alternative work schedule, especially when it comes to management. Managers may have to redesign jobs, tasks, or departments to account for new timesaving or productivity strategies. Workloads may need to be altered or shifted, and the maintenance of service or turnaround times will need to be considered along with alternative scheduling for employees and/or services. In light of these changes, managers will need to be intentional in maintaining relationships with employees despite the decreased facetime (Moen and Chu 2023; Wadsworth and Facer 2016).

In the last few years, there has been a significant increase in alternative or flexible work schedules, including remote or hybrid work at colleges and universities across the world. However, post-secondary institutions have yet to attempt a compressed or diminished work week. It begs the question of whether a 4-day work week could be successfully implemented across various departments or entire institutions. In 2022 Saint Paul University, a pontifical catholic university in Ottawa, Canada, introduced a 4-day work week pilot project for all administrative staff in the hopes of creating more work–life

balance, increasing employee satisfaction, increasing productivity, increasing retention rates, and remaining competitive in a city with multiple post-secondary institutions with higher budgets and salaries. Managers and supervisors across the university were informed of this change and asked to address each service's potential impacts, challenges, and opportunities. In 2023, the university concluded the pilot, and the 4-day work week was officially adopted and ratified in the support staff collective agreement.

This chapter will discuss how a small catholic university implemented the 4-day work week model for its administrative and support staff, and how this model has affected the library, its services, and the management of the library. This chapter will explore how the library employees adapted to this new model despite its small team, and the challenges library management faced when trying to find appropriate and adaptable strategies to maintain its high-quality services to the university community.

Managing the 4-day Work Week

Many theological libraries are small; most of these libraries are run by a staff of fewer than 10 people, and in some cases, by a single person. The Jean-Léon Allie Library at Saint Paul University employs seven full-time staff: three librarians and four library technicians. The pilot project included all library technicians as well as the Chief Librarian. The other two librarians fall under the full-time (FT) professor's union and were thus excluded from the project. As such, five of the seven FT library staff were switched from the regular 5-day, 35 hours/week schedule to a 4-day, 28 hours/week schedule. The first pilot project was introduced in June 2022 and concluded in October 2022, followed by a second pilot project from October 2022 to May 2023. Managers were informed of the project by human resources and upper administration and were given details as to how the 4-day work week would work. They also provided managers with various project management techniques to help them determine what changes would need to be made in their departments to maintain productivity, efficiency, and service. Managers were asked to examine their departments and determine what practices to keep, which ones needed improvement or changes, and what new practices needed to be added. Before the beginning of the pilot, the Chief Librarian met

with the head of user services to discuss the potential challenges, opportunities, and changes that would need to be made to accommodate this new model.

Challenge 1: Workload

Managers across the university were asked to examine each employee's workload to make sure that the same level of work and service were maintained within the 4-day work week. This proved very challenging as we now had five employees working not only one day less, but seven fewer hours, going from 35 hours a week to 28 hours. This meant that our staff needed to do the same amount of work in the week but with thirty-five fewer hours to do it. Each manager met with their employees to discuss their workload and examine all processes to see if any tasks could be improved, changed, or eliminated. During the first few months of the pilot, there were no significant changes in the workload for our FT employees, and they were able to complete all of their tasks and provide quality services to our patrons during the 4-day work week. However, full-time classes and our full student population returned in September. We began to notice a few problems; we were not able to shelve our books at the same rate as before, and the turnaround time for scan requests was getting longer. The service desk team met to discuss these problems and try to come up with solutions. We looked at our process for shelving and scanning, such as how many hours we all dedicate to these tasks and at what time of day would be the best times to try to complete them. We determined that gathering all of the scans needed in the morning and leaving them for our PT staff to complete in the evenings when the desk traffic was typically slower would help us maintain our turnaround time for scans, and free up more time for FT staff to shelve instead of scan. We also acknowledged that hiring work-study students to assist with shelving could be a possible solution. Subsequently, whenever we noticed that certain tasks became increasingly difficult to complete, all managers and library staff met to discuss what we could collaboratively do to maintain or improve our workloads and services.

Challenge 2: Days Off

The biggest challenge we faced when implementing the 4-day work week was making sure that the library's service/circulation desk would remain staffed for the same number of hours as usual. From September to April, the library's service desk is open 7 days a week. FT employees staff the desk from Monday to Friday during regular business hours, and three part-time (PT) employees staff the desk in the evenings and on weekends. Currently, three FT library staff work at the service desk, all of whom switched from a 5-day to a 4-day work week. This initially caused major scheduling conflicts. With the 4-day work week, employees were allowed to decide which day of the week they take off, also known as their "free" day, with many employees at the university opting for either Mondays or Fridays. There was a potential problem with employees all wanting the same day of the week off, and how we would determine who got what days. With three employees working four days, we needed to figure out which days they would like off while acknowledging that they could not take the same day off. We settled on a consistent schedule with one employee taking Mondays off and two employees taking Fridays off, with employees having the option to change their day if needed by submitting a change request in advance. The issue arose that if two employees took the Friday off, there would only be one employee left to work the desk for the whole day, meaning that the desk would need to close for breaks, lunch, and would, in turn, decrease the number of hours of service we provided to the university community. We needed to acknowledge that only having one person work the service desk on Fridays was not viable, so extra hours would need to be given to PT staff to cover any gaps in service. The head of user services also offered to cover and work the service desk on Fridays to help ease the burden of the only employee scheduled that day.

Challenge 3: Budget

We needed to increase the number of hours our PT staff worked to maintain the same level and hours at the service desk. Before the pilot, there were 30 hours/week of PT work, which needed to be increased to 45 hours, for a total increase of 15 hours/week. This had significant budget considerations. In the entire university, we were

the only department that needed to hire/increase PT work to account for the new work model. Upper administration granted our budget increase so that we could maintain our service hours. However, we acknowledge that this could be difficult for institutions that have very conservative or strict budgets.

Extra shifts were added on both Mondays and Fridays to accommodate the lower number of staff working that day and to account for any potential missed days due to vacation or illness. However, this, too posed challenges when hiring PT staff. The library tried to hire graduate students in master's library programs from another university to work the service desk during the year, and it became increasingly difficult to find students who could work during the day due to their class schedules. We expanded our pool of candidates to include students in the local college's library and information technician (LIT) program and increased the number of PT hires from three to four. We also hired two more PT Saint Paul students for work-study jobs in the library at 10 hours/week during the fall and winter semesters to keep up with our shelving and scanning demands. Overall, a small increase in PT staff as well as our budget was needed to maintain the same level of service and efficiency as before.

Moving Forward

Since the beginning of the pilot, our staff has reported that they feel a greater and more positive work–life balance and overall job satisfaction since the implementation of the 4-day work week. Our team comes to work with a more positive outlook and is ready to assist any of their team members as needed. We have noticed an overall increase in collaboration and willingness to adjust to emerging situations. We have also noticed an overall higher retention rate across all staff in the university. Being a smaller university in a city with two other major universities that are twenty to forty times larger than us, it can be difficult to attract employees as our salaries tend to be lower than those at bigger institutions. The implementation of the 4-day work week has proven to be an attractive work model and has allowed us to remain competitive. We have now had two years to adjust to the 4-day work week and have been able to implement it successfully in the library while maintaining the same quality of service to our patrons.

Managers have had to come up with creative solutions to adjust employee's workloads, scheduling, and budget to make this model a success. Managers remain in continuous open communication with their employees to adjust to any changes in service or schedule. The 4-day work week has required increased collaboration within the library and the entire university. Sometimes we may try to contact employees in other departments who are gone due to their free day, and it is important to have open communication across departments to ensure that we can all collaborate successfully, maintain service, and meet deadlines.

In conclusion, the 4-day work week model represents a paradigm shift in how we perceive work, productivity, and well-being in the modern age. By prioritizing efficiency, employee satisfaction, and work–life balance, organizations have the potential to foster a more engaged and motivated workforce. However, many challenges exist with this model, resulting in library management needing to be proactive in maintaining library services. As societal attitudes toward work continue to evolve, the 4-day work week is a progressive alternative to traditional work structures. While widespread adoption may not be feasible or suitable for every industry or organization, this model encourages employers and managers to rethink how they approach work hours and employee well-being. As more data becomes available and success stories such as ours emerge, the case for a shorter work week will likely continue to grow stronger. As we navigate the complexities of the 21st-century workplace, embracing innovative approaches like the 4-day work week could pave the way for a more sustainable and fulfilling future of library work.

References

Bersin, Josh. 2023. "How to Actually Execute a 4-Day Workweek." *Harvard Business Review,* December 8, 2023. *https://hbr.org/2023/12/how-to-actually-execute-a-4-day-workweek*.

Moen, Phyllis, and Youngmin Chu. 2023. "Time Work in the Office and Shop: Workers' Strategic Adaptations to the 4-Day Week." *Work and Occupations* 51, no. 4: 607–33. *https://doi.org/10.1177/07308884231203317*.

Vidat, Ana. 2023. "A Measure to Make Work More Flexible: Reducing the Working Week to 4 Days." *Perspectives of Law and Public Administration* 12, no. 4: 618–22.

Wadsworth, Lori L., and Rex L. Facer. 2016. "Work–Family Balance and Alternative Work Schedules: Exploring the Impact of 4-Day Workweeks on State Employees." *Public Personnel Management* 45, no. 4: 382–405. *https://doi.org/10.1177/0091026016678856*.

Managing Graduate Student Workers in Theological Libraries

VINCENT WILLIAMS

Many theological libraries hire graduate student workers to help meet their staffing needs. These workers fulfill a vital role within the library, often staffing a large percentage of circulation/reference desk hours, performing circulation tasks and shelving books, contributing to special projects, and providing hospitality for patrons. They are the first point of contact for many patron questions and are sometimes the de facto face of the library to patrons. The vital function these student workers provide to the library requires seriousness concerning their orientation, training, and ongoing development. However, due to a higher level of turanover compared to permanent staff coupled with their student status, equipping them to succeed can be challenging. Many supervisors and librarians find it difficult to match their significant role with proper training and guidance.

This chapter explores these issues and recommends some basic best practices for operating an efficient student worker program in theological libraries. Topics covered include recruitment, hiring, and interviewing; orientation, training, and ongoing development; scheduling and assigning shifts; dealing with problems like poor

performance or unreliability; and inspiring them as partners serving the library's mission. The chapter draws upon scholarly literature in academic librarianship and a few case studies and concludes with a blueprint for operating an effective graduate student staff program at theological libraries, in which student workers are fully equipped to contribute to the library's mission.

First Steps

Before initiating a recruiting or hiring process, managers should have an updated job description for each graduate student worker position. Updating these files at the beginning of each hiring cycle, often at the beginning of each semester, ensures that the library aligns the positions with its broader mission and initiates clear communication of expectations to the potential staff. In many cases, working with your institution's human resources or student employment office can guide you in setting a job description's format, required elements, and pay scales for each position. Beyond these formalities, it is also critical for all managers to understand their legal obligations as supervisors concerning their relevant legal jurisdiction. These may include knowledge of anti-discrimination, pay, breaks, and confidentiality regulations that must be followed.

Recruiting and Hiring

Hiring well is perhaps the most influential aspect of a successful student worker program. Supervisors devote considerable time and energy to each employee, and employees are trusted to contribute significantly to the library's mission. For these reasons, hiring students with strong potential is critical (Stevenson and Vanier 2018, 209). Theological libraries rarely fire employees, so hiring the best candidates ensures that libraries use their limited resources to manage students effectively.

A fair application process should ensure all interested students can apply. Working alongside any institutional staff responsible for student employment increases the likelihood that you will start with a good pool of interested candidates. Too often, libraries hire

students without appropriate due diligence to ensure they get the best candidates. The initial hiring and recruitment process sets the tone and expectations for the rest of the employee's relationship with the library, so it is essential to be intentional (Rex and Whelan 2019, 32–33). Post job openings in official venues for student employment and wait to hire until all interested students can reasonably respond to the advertisement and apply. This is a handy tip at the start of an academic year, where many students may reach out through informal channels to inquire about working in the library. While these early birds may demonstrate initiative, other great candidates may wait until they arrive on campus and have begun orientation to campus life to learn about employment opportunities. Gather an applicant pool of sufficient size to your context before moving forward.

When interviewing, it is acceptable to keep the process relatively informal yet serious. An initial written application process can help hiring managers gather relevant data from students, like resumes, prior work experience, and a particular interest in the position. It can benefit managers and potential employees to interview all qualified candidates except for nonviable outliers. On the one hand, hiring managers gain practical experience in conducting interviews. On the other hand, students benefit from interview practice and can use it as part of their overall learning experience at your institution, regardless of the outcome. Look for candidates with either an existing skillset or the potential to develop the skills outlined explicitly in the job description, whether customer service-based or attention to detail with shelving/shifting, for example. When evaluating candidates, use the job description as a guide to what the ideal candidate looks like. Wherever possible, be transparent with the applicant about the number of spots available, the timeline for decisions, and the process for the next steps. Transparency early on sets the tone for effective regular communication for hired applicants.

Because libraries often rely on student workers to provide staff for the library's full open hours, hiring managers might be tempted to hire non-ideal candidates. This may be necessary due to your context, but in my experience, it is usually better to under-hire slightly if there are not enough quality candidates. As alluded to previously, it is unlikely that you will fire a mediocre or below-average performing student worker, and they often take up significantly above-average time and energy to manage. Suppose an applicant pool is not of high enough quality. In that case, it is usually better to under-hire and fill what would regularly be a student shift or project with professional

library staff. That arrangement is better for the library than being stuck with a student who is not a good fit for your library, as they will reduce library service quality to patrons and require more stressful supervision.

Onboarding and Initial Training

Getting new student hires to a place where they can succeed in their library jobs can be challenging. Libraries often have complex policies and widely varying patron groups. While no one-size-fits-all approach exists, one can glean general best practices from the existing library and information science scholarly literature and case studies. Managers can use backward design principles to construct a training program (Stevenson and Vanier 2018, 211). A well-written job description can also provide helpful guidance for an intentionally designed program for new hires. Viewing elements of the job description as end goals or objectives can allow managers to prioritize training elements and formats conducive to helping students learn the required skills and gain the necessary knowledge for the position.

Practically, training might entail creating circulation procedures handbooks, utilizing an online LibGuide or wiki format for easy accessibility and updating, one-on-one training with a supervisor, group training events at the start of the term, and the use of quizzes, role-playing, or other reinforcement mechanisms tailored to the diverse learning preferences of your hires. Delivering training materials in an online format can help minimize the time managers spend on training, especially if not all employees can attend a single training event due to scheduling difficulties (McKenna 2020, 78). If managers have the relevant technical skills, there may also be benefits to embedding graduate student worker training into your institution's learning management system or a paid tool, such as LibWizard. Managers can include written procedures and policies there, along with videos or links to external web pages helpful for student training.

Ensuring library policies, including those for performing the job and those regarding scheduling processes, work expectations, payroll, and so on, are in a written format can help students reference them as needed without relying on their memories or notes from a

verbal training session, which may be incomplete or misinterpreted. If they are easily accessible and updated, students can also reference these procedures on the fly during their shifts. Supervisors may also save time and make their employees more effective by allowing students to specialize in their job responsibilities. If only a smaller portion of student workers need to learn a particular process/procedure, managers can save time by assigning that training to only that smaller portion of workers. If specific students evidence an aptitude for a particular task, they can become the go-to experts whenever that task needs to be completed (Cady et al 2003; Mestre and Lecrone 2015, 1). As I will explain later, specialization also pays dividends for employee engagement.

I have had some success in my library by creating a "working with me" document that I share with all employees so they can anticipate my management style and expectations unique to my personality. This kind of document might, for example, include your preferred communication method, expectations, how you provide feedback, and basic "about me" information to help new hires learn how to relate to you best. Again, in all cases, written documentation goes a long way to setting clear, transparent expectations for the job.

Ongoing Supervision and Development

An initial training or orientation is, of course, never the end of the employee's development. Being honest about what a one-shot or initial training session can accomplish, just as you are in library orientations or instructional sessions more broadly, can ensure students grow over time, gaining the skills they need to be more effective workers. Utilize the pedagogical insights you have gleaned from other library instructional programming to make your student worker training more effective. Student workers need regular communication and frequent feedback to let them know how they are performing and whatever issues must be addressed. From experience, it is also critical to address any problems before they become a habit and a culture of permissiveness develops concerning sub-par library service (Chung 2021, 35). It can be helpful, however, to reframe some of these issues less as problems to address and more as opportunities for ongoing development and reinforcement. It takes

time for students to become fully capable in any role in the library, so sequencing or appropriately pacing additional training is valuable.

Similarly, it is rarely apparent to the new employee how each element of their job fits together. They will develop new skills over time and only later make connections between their sometimes disparate responsibilities. Managers can aid this on-the-job learning process by being explicit about the value of the skills they are building both to perform their job well for the library and the transferable skills that will follow them back into the classroom or their post-graduation careers (Adeogun 2016, 18; Bischoff, Armstrong, and Waddell 2024, 261; Charles, Lotts, and Todorinova 2017, 13; Pierard, Baca, and Schultz 2022, 651). Working in the library provides students with critical thinking skills, enhanced information literacy, and time management skills that are a boon to their growth as graduate students (Mestre and Lecrone 2015, 17). They are students first, with vocational goals (usually) outside a library context. Elaborate on how the skills they develop inside the library will help them in their future vocations. Similarly, it can be helpful to intentionally design some job responsibilities or projects with these larger end goals in mind, assisting students in developing relevant skills for any context.

Clear communication is vital in the practical matter of assigning work shifts and projects. For institutions with greater numbers of graduate student workers, having a centralized method of keeping track of project progress and assignments is helpful. Several free digital tools, like Trello (which I use in my work), can help everyone be on the same page. More analog methods can function similarly, like a student worker task inbox/outbox in a shared location. It is a time-saver to track projects in a central place so that you are not trying to verbally keep track of each student's work individually, and this is especially useful when student shifts do not always match up with manager work shifts. For scheduling student shifts, larger libraries have had success with online shareable files using something like Google Docs, where students can volunteer for shifts themselves. However, for smaller libraries, a more manual process of gathering availability and assigning shifts is probably best to ensure maximum coverage. A manual process takes significant effort initially, but it can best align student worker shifts with library coverage needs. In all cases, aiming for consistent scheduling is crucial both for the students to plan around their academic and extracurricular activities and for managers to have regularity in their supervision duties.

Engagement

One of the most significant challenges managers face in theological libraries is how best to engage and motivate student workers. Indeed, one librarian wrote, "Many librarians and library staff members struggle to motivate their student employees and help them see their employment as a highly valuable, formative work experience" (Stevenson and Vanier 2018, 208). While I have briefly suggested aligning work assignments with student strengths, more can be said here. Much of the day-to-day work of a student worker role may consist of basic duties and recurring responsibilities, tasks that are not unique to the individual. Many libraries hire students primarily to staff a circulation desk and shelve books, with few other responsibilities. However, managers can increase the engagement level of their student workers and make progress toward broader library goals by involving these workers in more specialized library projects. There are always projects to be done in any library, and it is beneficial for managers to get creative in imagining how student workers could contribute to that work (Everett and Bischoff 2021, 418). Specialized library projects also allow students to utilize their unique skills and gain a greater variety of work experience, benefitting both employers and staff. Students who perform more specialized work feel a greater sense of ownership over their contributions and are more engaged (Sterling 2015, 23–25). They are more motivated in this case than if their responsibilities were narrowly limited to only basic functions.

Several case studies in the library and information science scholarly literature highlight the benefit of team-based projects in the library (Cady et al. 2023, 201). Libraries of any size could benefit from assigning shared work to a team of student workers. Often, students may be scheduled to work shifts by themselves without other student workers present. However, many students desire to collaborate with their fellow student workers on specific projects (Denda and Hunter 2016, 251). Even in cases where overlapping shifts are not possible due to staffing constraints, asynchronous shared student projects are more engaging for individual students and give them a chance to work together on complex, multistep projects, allowing them to contribute to the library's mission alongside each other. Working together gives everyone a sense of a shared mission and encourages everyone to invest more in the library's overall effectiveness.

Retention

Theological libraries sometimes struggle to retain student workers throughout their academic programs. In my experience, there are three primary, related causes of students choosing to leave library employment. First, nearly all graduate theological programs require their students to complete significant field education or ministry practicums outside of the classroom. These positions may include work in congregational settings or training for hospital chaplaincy. In reality, these are students' academic responsibility and they compete with other campus employment opportunities. This first cause is almost entirely out of the library's control, and managers would best be advised to work around these required training programs wherever possible.

The second, and related reason, for retention difficulties is that graduate theological programs are primarily vocational. Students are there for training and careers in ministry. For many students, they cannot see a clear application of the skills gained in library employment to their ultimate goal of working in ministry. Therefore, they will often leave library employment if they can gain job-related experience elsewhere that more closely aligns with their vocational goals. By heeding the best practices shared in the development and engagement sections of this chapter, managers can start to offer clearer pathways for students to gain meaningful job experience and skills that will transfer to other contexts, like ministry. Providing these opportunities will also increase your employees' intrinsic motivation (Fishbach and Woolley 2022, 343–47). While it is easy to ask student workers what kinds of experience and skills they hope to develop, it does take much more work for managers to identify library needs that will also fulfill their students' developmental goals. However, it is worth the effort to improve students' employment experience in this way.

The third reason for retention difficulties often derives from a lack of engagement or development while at work. If student workers are merely called upon to sit at the circulation desk, answer basic questions, and shelve books, those job duties will signal to them the relative (lack of) significance of their work. If library managers can offer more meaningful opportunities for students to creatively apply their existing skills and develop their experience in ways that also fulfill the library's mission, students will naturally shift their

views about their work. If students feel they are making a meaning-ful contribution to the library's mission in ways that make sense to them, they will be more likely to find ongoing value in their library employment.

Conclusion

By exploring the ideas presented in this chapter, managers have an opportunity to enhance their library's culture and provide a forma-tive work experience that will follow students into their careers. The entire employment cycle, from identifying library needs and draft-ing job descriptions, hiring and training, supervising and assigning work, to providing meaningful growth and development opportuni-ties, is essential as a whole. Each aspect contributes to the success of the others and to the overall experience. With this comprehensive view of a library's student employment program, library managers can thoughtfully design and execute a successful program for both the library and the student.

References

Adeogun, Margaret O. 2016. "Learn by Doing: An Assessment of the Impact of Access Services in Fostering Skills Development of Access Services Student Staff at Kennedy Library." *Public Services Quarterly* 12, no. 1: 1–21. *https://doi.org/10.1080/15228959 .2015.1101362*.

Bischoff, Marissa, Matt Armstrong, and David Waddell. 2024. "Professionalizing a Student's Library Employment Through Experiential Learning Workshops." *Journal of Library Administration* 64, no. 3: 261–74. *https://doi.org/10.1080/01930826. 2024.2316519*.

Cady, Jennifer Esteron, Karen Beavers, Amy Jiang, and Liberty McCoy. 2023. "Developing a Meaningful Student Employment Experience for Students' Success on Campus." *New Review of*

Academic Librarianship 29, no. 2: 189–202. *https://doi.org/10.1080/ 13614533.2022.2122852*.

Charles, Leslin H., Megan Lotts, and Lily Todorinova. 2017. "A Survey of the Value of Library Employment to the Undergraduate Experience." *Journal of Library Administration* 57, no. 1: 1–16. *https://doi.org/10.1080/01930826.2016.1251248*.

Chung, Jaeyeon L. 2021. "Mentoring and Supervising Library Staff in a Theological Library." In *Administration in Theological Libraries*, edited by Andrew Keck, 33–40. Chicago: Atla Open Press. *https://doi.org/10.31046/atlaopenpress.47*.

Denda, Kayo and Jennifer Hunter. 2016. "Building 21st Century Skills and Creating Communities: A Team-Based Engagement Framework for Student Employment in Academic Libraries." *Journal of Library Administration* 56, no. 3: 251–65. *https://doi.org /10.1080/01930826.2015.1121662*.

Everett, Joseph B. and Marissa Bischoff. 2021. "Creating Connections: Engaging Student Library Employees through Experiential Learning." *Journal of Library Administration* 61, no. 4: 403–20. *https://doi.org/10.1080/01930826.2021.1906543*.

Fishbach, Ayelet and Kaitlin Woolley. 2022. "The Structure of Intrinsic Motivation." *Annual Review of Organizational Psychology and Organizational Behavior* 9: 339–63. *https://doi. org/10.1146/annurev-orgpsych-012420-091122*.

McKenna, Julia. 2020. "So Many Students, So Little Time: Practical Student Worker Training in an Academic Library." *Journal of Access Services* 17, no. 2: 74–82. *https://doi.org/10.1080/15367967.2 020.1718505*.

Mestre, Lori S. and Jessica M. Lecrone. 2015. "Elevating the Student Assistant: An Integrated Development Program for Student Library Assistants." *College & Undergraduate Libraries* 22, no. 1: 1–20. *https://doi.org/10.1080/10691316.2015.1001240*.

Pierard, Cindy, Olivia Baca, and Anne Schultz. 2022. "Connecting Student Employment to Student Learning and Post-Graduation Goals: Findings from a Multi-Semester Study." *Journal of Library*

Administration 62, no. 5: 633–55. *https://doi.org/10.1080/01930826. 2022.2083441*.

Rex, Jared A. and Jennifer L.A. Whelan. 2019. "The Undergraduate that Could: Crafting a Collaborative Student Training Program." *College & Undergraduate Libraries* 26, no. 1: 19–34. *https://doi.org/ 10.1080/10691316.2018.1535923*.

Sterling, Lorelei R. 2015. "Books Not Burgers: Six Highly Effective Ways to Motivate and Retain Library Student Employees." *Journal of Access Services* 12, no. 3–4: 118–27. *https://doi.org/10.10 80/15367967.2015.1098544*.

Stevenson, Sarah and Patty Vanier. 2018. "Creative Strategies for Effective and Engaging Student Employee Training: Helping Student Employees Engage, Grow, and 'Be Known.'" *The Christian Librarian* 61, no. 2: 208–15. *https://doi. org/10.55221/2572-7478.2020*.

Considering the HR Implications for a Work-at-Home Workforce

DREW BAKER AND THOMAS E. PHILLIPS

The Digital Theological Library (DTL), where the co-authors both work, is a unique library. The DTL operates on a co-ownership model to create one shared library that is bigger and better than any of its member institutions could ever hope to create on their own. By working together, the DTL's co-owning seminaries can enjoy access to a world-class research library in religious studies at prices that are realistic for small seminaries. Given the mission of the DTL, from its beginning the DTL was envisioned to be an entirely cloud-based library with no circulating print collections. Because of the DTL's entirely digital approach to librarianship, the library has operated with a nonresidential workforce from its inception.

In this chapter, we will draw upon our experience and research related to the management and human resources (HR) implications of managing a largely remote workforce. At the time of our writing, the DTL employs professionals in five states in the United

States (California, Idaho, Utah, Pennsylvania, and Ohio); the DTL also works with one independent contractor in Washington. The following reflections are based on our experience and research regarding this context. While the DTL is unique in many ways, managing a distributed workforce is increasingly common in the seminary library world. We hope that the advice below applies to many different institutions from a wide range of contexts.

Classifying Workers

For librarians who work at small seminaries with little or no professional HR assistance, it is very important to know the legal requirements regarding persons who perform work for the institution. Government entities at all levels have created a substantial body of legislation designed to protect workers from exploitation by their employers, and violations of labor law can carry stiff penalties. Misidentifying workers or failing to comply with applicable legislation—even unintentionally—can open an institution to a class action lawsuit with harsh implications for finances and reputation. More fundamentally, morality and the law are not the same. Moral employers should not settle for legally required minimum standards alone. Also note that religious organizations, like churches, mosques, temples and synagogues, are typically exempt from most labor laws, but as educational institutions, seminaries are not exempt from labor laws (National Labor Relations Board n.d.).

Paid or Unpaid?

Unpaid workers can provide valuable assistance to a library. However, it is important to understand that most governments recognize two different kinds of unpaid workers: volunteers and interns. Volunteers typically serve the organization out of a sense of altruism and commitment to the organization. However, labor laws were written to protect workers from being exploited by unscrupulous employers. Therefore, most government entities, including the U.S. federal government, prohibit volunteers from doing any work that is also performed by paid employees. So, for example, a volunteer could not perform reference assistance if paid employees also

sometimes provided reference assistance. When both paid employees and unpaid volunteers have overlapping job responsibilities, that volunteer's work falls under the legal category of "uncompensated labor," and the library is guilty of "wage theft" under federal law.[1] These labor restrictions apply even if the worker is volunteering for a nonprofit and even if the volunteer has signed a waiver. The work of volunteers and paid employees (and outside contractors) cannot overlap.

The regulations regarding interns require that any work performed by an intern must be designed "primarily for the benefit of" the intern and not the benefit of the library. The two customary tests for determining who is receiving the primary benefit of the intern's work are if (*a*) the work is being performed for the sake of the intern's training or skills acquisition or (*b*) the intern is getting academic credit for the internship (U.S. Department of Labor Wage and Hour Division 2018). Interns can do any kind of work (unlike volunteers) if they acquire professional skills or get academic credit for the internship.

For libraries, the decision is simple: Allow volunteers to do only those tasks paid personnel never perform and employ only interns who earn academic credit for the internship or are learning new library-related skills. (In the United States, unpaid internships are limited to six months unless the intern is earning academic credit.) Our advice is not to use volunteers at all and to use only interns who are receiving academic credit for the internship.

Employee or Contractor?

Regarding paid workers, both the U.S. federal government and individual states make important legal distinctions between "employees" and "contractors." This distinction is key to the U.S. Fair Labor Standards Act.[2] Employers are obligated to pay an array of federally mandated expenses related to employees, including overtime, sick leave, disability and unemployment insurance, and half of an employee's social security taxes. Contractors do not have to be paid these benefits.

Because the legal obligations to employees are higher than the obligations to contractors, it is usually to the worker's advantage to be designated as an employee. The authors advise any professional librarian or paraprofessional library technician should be treated

as an employee and given employee benefits even if they work from home. The key legal distinctions between an employee and a contractor are multifaceted and imprecise, but generally speaking, anyone who meets one of the following criteria should be classified as an employee: (1) the person works exclusively for the same organization; (2) the work being performed is directly related to the organization's "core business;" (3) the employer sets the work hours; (4) the employer supplies the "tools," including software programs, used to complete the work; (5) the worker is paid by the hour, rather than by the task; and (6) the worker supervises employees.[3] In nearly every case, any person who is paid by the hour to perform basic library work (e.g., cataloging, reference, collection curation, digital resource management) should be treated as an employee and given the benefits of an employee. The organization should never have contractors and employees doing essentially the same tasks.

Hourly or Salary?

Like unpaid workers, employees fall into two categories: hourly and salary. The key distinctions between hourly (nonexempt) and salary (exempt) employees are how their work is defined and how they are paid. On the one hand, hourly employees are paid by the hour, and their work is defined by the amount of time they work. Hourly employees must be paid for each minute they work (even if that "work" is simply answering a text,) and hourly employees must be paid overtime (their hourly wage plus 50%) for any work beyond 40 hours in one week or more than 8 hours in one day (in most U.S. states; Vilos 2015). On the other hand, salary employees are paid for the work they do, not for the time it takes them to perform that work. Thus, a salaried employee's job performance and pay cannot be linked to their work time. Salaried employees do not earn overtime (i.e., they are "exempt" from overtime pay), but they also cannot be penalized for working partial days (as long as their job functions are being accomplished). In most states, exempt (salary) employees must be paid at least twice the minimum wage.

Most of your employees will be hourly in libraries, but this means they must be paid for every minute they work. Do not allow people to "do a little work" (like answering emails or fixing a few broken links) when they are "off the clock." Our advice for hourly employees is either to use entirely flexible hours (allowing people to work

whenever they wish) or a combination of some designated work times and some flexible hours.

Reimbursement for Work-Related Expenses

In most situations, it is a best practice for employers to reimburse employees for any goods or services that are "necessary" for those employees to complete their duties. These necessary expenses must be actual costs incurred by the employee. They must be documented, but they include a wide range of goods and services, most notably: internet services, software licenses, computers and electronic devices, travel costs, cell phone service, expenses related to working at home, training or education costs, and home office equipment. If a job requires a computer and internet access, the employer is responsible for paying for these "necessary" costs of employment. Employees should never be encouraged "to use their own" computer, internet account, or software license to complete work for the employer. As an additional health and safety concern (and as a legal requirement in most locations), employers should ensure that employees have ergonomically appropriate spaces and furniture in their home work environments. It is wise to provide a stipend, allowance, or pattern of reimbursement for workers to create such spaces. In short, libraries should provide remote workers with the same worker support in terms of furnishings, software, connectivity, and equipment as they would to the worker on site.

Accountability and Productivity

A significant amount of research demonstrates that workers are more productive in most tasks from remote sites, particularly because of less time spent in meetings and informal chat sessions. However, research also suggests that managers need to be particularly sensitive to the possibility of workers becoming socially isolated and losing a sense of collaboration and collective employee insight. The most important factor for avoiding worker detachment is the response times from their supervisors. Supervisors must be very present and immediately responsive to every inquiry.

Assuming that supervisors are fulfilling their support and communication responsibilities, those who supervise remote workers need to be particularly mindful of accountability and productivity standards for their employees. Benchmarking is essential. Clearly define what work needs to be completed, when that work needs to be completed, and how the employee and work will be evaluated. Clearly defined expectations benefit both libraries (which need to ensure that work is being completed) and employees (who consistently report their desire for clear expectations). Wise library administrators will emphasize that the expectations they deliver to their employees are intended to serve both the staff and the library, not solely the library.

Cybersecurity

Maintaining cybersecurity is difficult with a single site and one central point of employee contact with outside systems. However, these perennial security challenges are made exponentially more difficult when employees are working from home, over networks that may not be secure, and on devices that are not directly maintained by the site IT professionals. As a first step, the employer should provide work devices for all employees and establish clear policies for how company-owned "at-home" devices can and cannot be used. The employer should also provide secure web connections for remote workers. To be clear, given security and liability issues (what if an employee's device is hacked and personnel information is stolen?), it is wise to require all employees to use a company-issued device for all work, regardless of where that work occurs. Libraries should assign a person to perform routine cybersecurity audits of all devices used by remote employees.

In-Person Gathering

In the absence of the informal and serendipitous encounters that naturally occur in the traditional workplace, workers can become distant from one another and cease to give one another the benefit of the doubt in often brief (and potentially terse) digital communications

between colleagues. An overwhelming amount of research has demonstrated the importance of bringing all remote and residential workers together regularly (at least annually) for face-to-face interaction. These meetings should include both structured and unstructured interactions. Joint attendance at professional conferences and continuing education events is wise. In times of tight budgets, it may seem indulgent to make in-person gatherings a budgetary priority, but it is a false economy to underinvest in employee relationships.

Worker Satisfaction

In traditional libraries, library administrators naturally observe the colleagues they supervise and intuitively sense when workers are dissatisfied. Supervisors cannot rely upon such intuitive and informal means of discerning worker satisfaction when supervising a remote workforce. Even though HR surveys demonstrate that remote employees report liking the flexibility that remote work provides for them, any dissatisfaction on the part of remote work can be difficult to determine in the absence of the supervisor's willful and intentional collection of data about worker satisfaction (Pattnaik and Jena 2020, 873–74). Supervisors cannot merely presume that everyone is happy in the absence of direct complaints. Instead, supervisors must devise tools—surveys, third-party inquiries, and other forms of routine reporting—to measure worker satisfaction. Remote workers who are dissatisfied with their work can easily disengage (causing poor productivity) or simply resign to pursue other opportunities. In situations with a blended workforce (some remote workers and some on-site workers), remote workers can feel like they are left out of the library's culture, and on-site workers can feel disproportionately burdened. The same benchmarks should be used to measure the productivity of all workers—remote and on-site. Promotions should be equally available to all employees. Proactive engagement and fairness are both essential to maintaining worker satisfaction.

Conclusions

So, with this brief introduction in mind, what should a library know about managing a remote workforce?

Classify your workforce correctly. Ensure the people performing the work in your library are correctly classified as employees or contractors and that the employees are correctly classified (and treated as) hourly or exempt. Avoid relying on volunteers and limit internships to people earning academic credit.

Reimburse in compliance with the law. Buy every remote worker a "work" computer, and give these employees a (nontaxable) allowance sufficient to cover their internet, additional utilities, and incidental expenses. Your institution may need to set up an employee task force of on-site and remote workers to develop a reasonable reimbursement plan for remote workers.

Create safe workspaces everywhere. Make sure that every remote and on-site worker has an appropriate desk, chair, and ergonomic workspace.

Clarify communication and time expectations. Ensure hourly employees are only permitted to engage with office work and communications when they are "on the clock" and being paid by the library. Do not unwittingly engage in wage theft.

Clarify performance expectations. In addition to clarifying expectations for hourly employees, set clearly stated benchmarks for exempt employees. Use the same benchmarks for all employees.

Be mindful of network security. After providing company technology for all employees, insist that all library business—and only company business—be performed on those devices.

Gather regularly. People need to know their colleagues personally.

Survey employees. Seek out information about satisfaction levels among remote and on-site workers. Is there a perception of inequality on any front?

References

National Labor Relations Board. n.d. "Jurisdictional Standards." Accessed January 23, 2025. *https://www.nlrb.gov/about-nlrb/rights-we-protect/the-law/jurisdictional-standards*.

Pattnaik, Laxmiprada, and Lalatendu Kesari Jena. 2020. "Mindfulness, Remote Engagement and Employee Morale." *International Journal of Organizational Analysis* 29, no. 4: 873–90.

U.S. Department of Labor Wage and Hour Division. 2018. "Fact Sheet #71: Internship Programs Under the Fair Labor Standards Act." Updated January 2018. *https://www.dol.gov/agencies/whd/fact-sheets/71-flsa-internships.*

Vilos, Joanna R. 2015. "Non-Exempt Employees Who Check Emails Outside of Normal Hours Can Cause Payroll Nightmares." *National Law Review* 5, no. 274. *https://www.natlawreview.com/article/non-exempt-employees-who-check-emails-outside-normal-hours-can-cause-payroll*.

Additional Reading

Banks, Cristina G., and L. A. Witt. 2021. "Leveraging Healthy Workplaces as a Strategic Benefit." *The Journal of Total Rewards* 30, no. 1: 55–70.

Bentham, Katharine A. 2020. "The Impact of Leadership and Management on Remote Workers: Everyday Tips for Success, Not Just During a Pandemic (COVID-19)." *i-Manager's Journal on Management* 15, no. 3: 1–6.

Crawford, Joseph. 2022. "Working from Home, Telework, and Psychological Wellbeing? A Systematic Review." *Sustainability* 14, no. 19: 11874. *https://doi.org/10.3390/su141911874*.

Downer, Kathleen and Maumita Bhattacharya. 2022. "BYOD Security: A Study of Human Dimensions." *Informatics* 9, no. 16: 1–21.

Ellison, Jessica K. 2012. "Ergonomics for Telecommuters and Other Remote Workers." *Professional Safety* 57, no. 6: 86–90.

Erickson, Nicholas J. 2020. "Across the Digital Divide: Managing Remote Workers." *The Computer & Internet Lawyer* 37, no. 8: 1–4.

Hosoi, Mihoko, Lauren Reiter, and Diane Zabel. 2021. "Reshaping Perspectives on Flexible Work: The Impact of COVID-19 on Academic Library Management." *Libraries and the Academy* 21, no. 4: 695–713.

Kelly, Marie, and Nikki Shoemaker. 2021. "Telecommuting: Creating a Resentful On-Site Workforce." *Journal of Organizational Psychology* 21, no. 1: 11–15.

Kolomoets, E. 2022. "Ensuring Information Security in the Field of Remote Work." *Journal of Physics: Conference Series* 2210: 012008. *https://doi.org/10.1088/1742-6596/2210/1/012008*.

Kowalski, Kellyann Berube, and Jennifer Ann Swanson. 2005. "Benchmarking." *Critical Success Factors in Developing Teleworking Programs* 12, no. 3: 236–49.

Tomei, Manuela. 2021. "Teleworking: A Curse or a Blessing for Gender Equality and Work-Life Balance?" *Intereconomics* 56, no. 5: 260–64. *https://doi.org/10.1007/s10272-021-0995-4*.

Veselova, Andzela. 2022. "Employees' Satisfaction in the Context of Remote Work." In *Economic and Social Development: Book of Proceedings*, edited by Mustapha Machrafi, Dean Uckar, and Toni Susak. Rabat: Varazdin Development and Entrepreneurship Agency.

Vogel, Ryan M., Jessica B. Rodell, and Anastasiia Agolli. 2022. "Daily Engagement and Productivity: The Importance of the Speed of Engagement." *Journal of Applied Psychology* 107, no. 9: 1579–99.

Endnotes

1   For this US example, see: Application of the Fair Labor Standards Act to Employees of State and Local Governments, *29 CFR §553.101*.

2   *89 FR 1638 (Jan. 10, 2024)*.

3   *89 FR 1638 (Jan. 10, 2024)*.

Contributors

Drew Baker is Managing Director and COO, The Digital Theological Library.

Tamara A. Conley is Reference Librarian, Cardinal Stafford Library, St John Vianney Theological Seminary, Denver, Colorado, USA.

Leslie A. Engelson is Metadata Librarian, Murray State University, Murray, Kentucky, USA.

David W. Kiger is Director of Libraries and Theological Librarian, Milligan University, Milligan, Tennessee, USA.

Timothy D. Lincoln is Research Professor Emeritus of Theological Education, Austin Presbyterian Theological Seminary, Austin, Texas, USA.

Thomas E. Phillips is Executive Director, The Digital Theological Library.

Stephen Sweeney is the former Library Director, Cardinal Stafford Library, St John Vianney Theological Seminary, Denver, Colorado, USA.

Victoria Tsonos is Head of User Services Librarian, Jean-Léon-Allie Library and Archives, Saint Paul University, Ottawa, Ontario, Canada.

Vincent Williams is User Services Librarian, Bishop Payne Library, Virginia Theological Seminary, Alexandria, Virginia, USA.

The Theological Librarian's Handbook is a multi-volume guide to the practice of theological librarianship. It is intended for use by library staff at theological and religious studies libraries who do not possess professional training in the field of library and information science. This handbook offers perspectives and advice from leading experts in the field and best practices from theological libraries all over the world.

This volume introduces the reader to the world of theological librarianship and answers these basic questions:

What is the distinction between administration, leadership, and management?

What principles of management are important to consider in theological libraries?

How does one successfully manage different operations and projects within them?

atla **Open Press**