Trends and Issues Affecting Workforce Planning in New Zealand University Libraries

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Table of Contents

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Attestation of Authorship

I hereby declare that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

Gillian Barthorpe
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Abstract

University libraries are facing transformational changes in order to remain relevant and meet the needs of their users in the 21st century. This study investigated the trends and issues affecting workforce planning in New Zealand university libraries. New Zealand university library senior managers and younger staff were interviewed to draw on their insights and understanding of these trends and issues taking the New Zealand context into account. An examination of the literature found similarities between New Zealand and other parts of the world with regard to the technological developments and changes in scholarly publishing models that are impacting on university libraries. This has and will continue to impact on the services offered, both in the physical and virtual environments, as well as the skills and competencies required by library staff to meet these needs. Within the Zealand tertiary education context cognisance needs to be taken of the identified priorities to increase the country's research profile and improve the productivity levels of an increasingly diverse population. This is underpinned by the government funding model which is unlikely to benefit from any significant increase in light of the current global economic situation.

Workforce planning has become increasingly important to ensure that university libraries have staff with the appropriate skills and competencies to meet these changing needs in the future. The impact of the ageing workforce working for longer as well as the impending retirement of many of this cohort in the next ten to fifteen years presents challenges and opportunities for libraries. The recruitment of new staff to the library profession as well as the relevance of the present professional qualifications were identified as issues of concern. Succession planning and the provision of career development opportunities for these staff, particularly in the area of leadership and management development are essential to ensure that they are retained.

Chapter 1

Introduction

"The library of the future can and should come to fruition on your watch" (University Leadership Council, 2011, p. 5). As a senior library manager this statement was a real wake-up call and made me realise that we can no longer deny the fact that university libraries are facing dramatic changes. It is the responsibility of today's managers to plan strategically for this transformation by ensuring that library staff have the skills and competencies as they need to deal with the advancing and converging technologies that will fundamentally change the way they work (Lewis, 2010; University Leadership Council, 2011).

Taking into account the impact of these fundamental changes on library services and resources workforce planning was never more important than it is now to ensure that university libraries have the staffing resources they need to thrive in the future. I am very aware of the 'greying' of the library workforce, particularly those in management positions in New Zealand university libraries. My experience of recruitment has also made me acutely aware of the strategic need for workforce planning. Research indicates that university libraries elsewhere have embarked on this process while little, if anything, is being done in New Zealand university libraries. Thus the purpose of this study is to consider the trends and issues affecting workforce planning in New Zealand university libraries.

1.1 Research background

While the future of academic libraries is debated worldwide, for the purposes of this study it is important to consider the trends and issues within the New Zealand context. The New Zealand Department of Labour and the Tertiary Education Commission have identified an increasing need for people with higher level

qualifications and an improvement in the utilisation of workforce skills in New Zealand (Department of Labour, 2011; Ministry of Education, 2010). The need for educational institutions that are able to produce students with higher level qualifications, an increase in the number of people with degrees and the necessary skills to increase productivity levels in New Zealand have also been identified as important (Department of Labour, 2011). This will impact on universities and their libraries as they will need to provide the necessary expertise and support to facilitate these changes. The report also draws attention to the impact on the workforce as the ageing population progressively leave the workforce. It is important to ensure that there is a transfer of institutional knowledge and provision made to replace their skills (Department of Labour, 2011). The Tertiary Education Strategy also draws attention to the need for an increase in high quality research in New Zealand. University libraries play an important role in providing access to and support in the use of research resources (Ministry of Education, 2010; Tertiary Education Commission, 2010).

"A combination of a rapidly changing digital world landscape, 24/7 electronic access to information and a changing workforce are a few of the key factors currently impacting on the tertiary library" (Department of Labour, 2011, p. 171). This statement reinforces that fact that libraries of the future need to be continually monitoring and adapting to the environment in which they operate. This means continually rethinking and restructuring services to enhance the research, teaching and learning objectives of the institution they serve (Keiser, 2010; McKnight, 2010).

The increased availability of mobile devices and the use of social networking tools have impacted on the way people work and the increased demand for virtual and embedded library services. At the same time while the use of traditional library services and resources has declined there is still a demand for a physical library providing collaborative learning and study space equipped with latest technology (Law, 2009; University Leadership Council, 2011).

University libraries have traditionally played an important role in supporting researchers by providing access to resources and services in the physical space. However the emphasis of support is changing with the growth of online services and resources such as research repositories which provide open access to the university's research outputs and potentially access to research data. The growth of the internet and Web 2.0 technologies has provided opportunities for greater international collaboration by researchers including the sharing of research data and outputs. This raises a number of questions about whether libraries have a role to play in providing expertise in the areas of management and curation of research data (Herman & Gioia, 2001).

These changes indicate the need for a shift in the skills required of library staff in the next decade. It is predicted that there will be a need for staff with greater technological skills and possibly fewer staff with a library qualification (Walter & Williams, 2010). Workforce planning is therefore essential to ensure that university libraries have the right people with the right skills and competencies in the right jobs at the right time (Stokker & Hallam, 2009). It is important that the workforce plan is integrated into and aligned with the strategic direction of the library so that informed decisions are made about the types of jobs and the competencies and skills required for present and future needs within budgetary constraints (Boxall, Macky, & Rasmussen, 2003; Business and Economic Research (BERL), 2010; Gruman & Saks, 2011).

There are a number of issues to be considered with regard to workforce planning in university libraries. The large cohort of older workers is of particular concern as many are continuing to work beyond the normal retirement age and this may present challenges around skill currency, performance issues and resistance to change (Buyens, Van Dijk, Dewilde, & deVos, 2009).

Furthermore there are likely to be a large number of retirements in the next ten to fifteen years so it is important to have strategies in place to ensure the transfer

and retention of organisational knowledge and continuity of leadership within the library (Munde, 2010).

The recruitment and retention of staff requires particular attention in the future as library roles will need to change quite substantially to accommodate the shift in library services. Library staff, both existing staff and new recruits, will need to be flexible, adaptable and willing to learn new skills (Lewis, 2010). As identified above it is anticipated that there will be a need for staff with different skills in the future, particularly in the area of technology. However budgetary constraints could make recruiting to these additional and potentially more costly positions challenging for university libraries.

Innovative, visionary leadership is an important aspect of the successful transformation of university libraries. Wright (2010) posits that leadership should be an organisation-wide responsibility and that library staff at all levels should be prepared to take on a broader range of leadership roles and responsibilities. This will require a significant mind shift amongst staff and comprehensive development opportunities to ensure they acquire the necessary skills and capabilities (Wright, 2010).

1.2   Research objective

In seeking to identify the trends and issues affecting workforce planning in New Zealand university libraries I felt it was important to draw on insights from New Zealand university staff to find out how their perceptions and experiences compare with those identified in the current literature on the topic.

I expected that participants would raise concerns about the ageing workforce and the need to attract younger staff to the profession. The issues would be to do with older workers staying in the workforce for longer, perhaps not being prepared to up skill to deal with new technologies and demands, but also not making way for the recruitment of younger people with the right skills to do so. A further issue is the

fact that leadership positions are generally held by older workers who are likely to retire in large numbers over the next two decades potentially leaving a large void which may be hard to fill.

It is anticipated that roles requiring new skills and possibly additional staffing resources in the areas of research support and the curation of research data will present challenges with regard to staff development and the need to operate within the financial constraints placed on universities.

The increasing need for staff with technological expertise and the ability to deal with the greater use of online resources, mobile technologies and virtual library services is expected to be raised as well as the continuing need for the library as a place for study and collaborative learning and the possible requirement for 24/7 availability.

I also anticipated that the trends and issues would be similar to those in other parts of the world but some trends would be unique to the context within which New Zealand university libraries operate. Furthermore it would be interesting to establish whether any of the New Zealand university libraries has developed a workforce plan and to learn from their experiences.

1.3   Justification for the research

While research has been conducted in other parts of the world on the trends and issues influencing the transformational changes facing university libraries I am unaware of similar published research specific to the New Zealand context. Likewise there is no evidence of research into workforce planning or evidence of the implementation of a workforce plan in New Zealand university libraries. If that is correct then this study will contribute to the body of knowledge by adding theory about the trends and issues affecting workforce planning in New Zealand university libraries and how this compares with the trends and issues in other parts of the world.

1.4   Research Design

This study will examine the topic by gathering qualitative data from a group of participants with sufficient knowledge of the university library context. I have taken an interpretivist approach which acknowledges that the data collected will be a subjective interpretation of the participants' knowledge and experience of the reality. The data will be subject to further interpretation in light of the personal experience and prior research of the researcher.

Data will be collected from three groups of university staff, namely senior library managers, younger qualified librarians (born in or after 1975) and senior human resource managers. Data will be collected by conducting an in-depth semi-structured interview with each participant. Particular areas of interest will be explored and participants will be encouraged to contribute as fully and widely as possible as well as raising other topics of importance. The interviews will be conducted face to face with the Auckland participants and via telephone for the participants outside of Auckland. Thematic analysis will be the method used to code and categorise the data to identify themes which will be reported on in the analysis of the data. The research design will be discussed in greater detail in the relevant chapter of this dissertation.

1.5   Structure of the dissertation

This chapter provides an introduction to and an overview of the topic to be discussed in this dissertation by outlining the research background, the objective and justification for the research and the research design. Chapter Two covers a review of the literature associated with the topic of the research. Chapter Three provides details of the research design used to analyse the data gathered during the interviews. In Chapter Four the findings of the interviews are presented and Chapter Five discusses and interprets the findings in relation to the research question and the theory discussed in the literature review. The limitations of the

research and opportunities for further research are discussed in Chapter Six. The final chapter presents the conclusions drawn from this study.

Chapter 2

Literature review

There has been on-going debate since the 1960s about the future of libraries and whether they will become redundant as technology advances and resources become more widely and freely accessible in electronic format via a variety of mobile devices. Alternatively, will they continue as they are indefinitely or can they adapt and become part of the online, individualised university environment? However recently it has been suggested that "the library of the future can and should come to fruition on your (our) watch" (University Leadership Council, 2011, p. 5). The escalating changes in technology, the demand for new services and the changes in scholarly publishing models would suggest that university libraries can no longer adopt a 'wait and see' attitude but need to act now. This raises the question of whether library staff have the skills to provide the services required by academic staff, researchers and students in the 21st century?

2.1   New Zealand context

While this is debated worldwide, for the purposes of this study it is important to consider the trends and issues within the New Zealand context. The New Zealand Department of Labour has identified the need for a workforce with a higher level of educational skills and the need to improve the utilisation of these skills (Department of Labour, 2011; Ministry of Education, 2010). The requirement for high-performing educational institutions that are equipped to increase the number of degree-holders with the necessary skills has been identified as an essential element to meet the demand for a present and future workforce capable of increasing productivity levels in New Zealand (Department of Labour, 2011; Ministry of Education, 2010). While there has been a general increase in the skill levels of the New Zealand workforce over the last twenty years it is still only at an

average level in comparison with the OECD countries (Tertiary Education Commission, 2010).

Good managers are essential to ensure that the skills of workforce are fully developed and utilised. Tertiary institutions need to be prepared to meet the demand for leadership and management training to improve the level of leadership and management skills of present and future managers (Department of Labour, 2011). Universities will be required to provide the necessary expertise and knowledge to support and facilitate the achievement of these priorities and ensure that students are well equipped with the skills and knowledge to make a valuable contribution in the workplace.

Many older workers are considering retirement over the next ten to fifteen years which will have a considerable impact on participation rates and productivity in organisations. It is important in the interim to find ways to keep their skill levels current and retain their expertise for a little longer by offering flexible working options and if necessary reducing the physical demands of their jobs (Department of Labour, 2011). The need for a continued improvement in skill levels for the whole country is essential to replace the skills of the ageing workforce (Tertiary Education Commission, 2010).

The Tertiary Education Commission Report (2010) states that as the population of New Zealand becomes more ethnically diverse, particularly with the growth of the Māori, Pacific and Asian groups, that there will be a change in the demands on tertiary education as they strive to meet the needs of these groups so that they can make a valuable contribution to the future workforce (Tertiary Education Commission, 2010).

The Tertiary Education Strategy 2010 – 2015 draws attention to the need for tertiary institutions to increase the research capacity of the country by building international research partnerships and building relationships with institutions and communities within the country. It is essential that teaching is informed by research to build the knowledge base and encourage innovation to increase productivity

levels and an understanding of the technological, social and environmental issues impacting on the country. Teaching research skills and supporting student research are important for the development of critical thinking skills that encourage innovation (Ministry of Education, 2010).

The Tertiary Education Strategy 2010 – 2015 states with specific reference to universities that "universities have three core roles:

- To undertake research that adds to the store of knowledge
- To provide a wide range of research-led degree and postgraduate education that is of an international standard
- To act as sources of critical thinking and intellectual talent

The Government expects universities to:

- Enable a wide range of students to successfully complete degree and postgraduate qualifications
- Undertake internationally recognised original research
- Create and share new knowledge that contributes to New Zealand's economic and social development and environmental management" (Ministry of Education, 2010).

The government, at present, invests more highly in universities than in other tertiary institutions, which is an indication of the degree of importance they place on higher level qualifications. The government funds tertiary education with a variety of funding models and the most important ones for universities are the Student Achievement Component Fund, the Tertiary Education Organisation Component: Performance Based Research Fund and the Tertiary Education Organisation Component: Capability Fund. The Student Achievement Component Fund is dependent on retention and completion rates of students enrolled in university programmes. The Performance Based Research Fund is based on an assessment of the number and quality of the research outputs of academic staff (Ministry of Education, 2010). This funding model enables the government to regulate student numbers and funding criteria (Department of Labour, 2011).

University libraries have traditionally been valued for their contribution to the teaching, learning and research outcomes of the institution. If this is to continue they need to be cognisant of these strategic priorities in the future. It is essential that as academic librarians envision and plan for the 21st century library that this is done within the context of the trends of the environment in which they operate (McKnight, 2010; Oakleaf, 2010).

"A combination of a rapidly changing digital world landscape, 24/7 electronic access to information and a changing workforce are a few of the key factors currently impacting on the tertiary library" (Department of Labour, 2011, p. 171). Libraries of the future should not remain static but be continually monitoring the environment in which they operate to ensure they are rethinking and restructuring to enable the provision of services that enhance the research, teaching and learning objectives of the institution they serve (Keiser, 2010; McKnight, 2010).

2.2   Trends and issues affecting university libraries

There have been predictions that libraries could become redundant with the rapid growth of digital content such as Google and Wikipedia but it can be argued that they present opportunities to fundamentally change library and information services and facilities to meet the needs of the 'digital natives' or the 'Google generation' as our future students are sometimes called (McKnight, 2010; Walton, Burke, & Oldroyd, 2009).

2.2.1 Technological changes

Libraries have traditionally housed collections of print books, journals and other research resources and been judged by the depth and strength of these collections (Law, 2009). However this has changed over the last two decades as much of this content, particularly scholarly journals has been digitised and made available online. The traditional domain of libraries is being further challenged as born digital

content increases and the likes of Google Books make digital books freely available and social networking tools appear to have taken over the traditional activities of libraries such as reference services, cataloguing and classification and user education, leading universities to question the need for traditional libraries (Law, 2009). The emphasis will increasingly shift from ownership of resources to the provision of access to resources from a variety of sources (Lewis, 2010).

This plethora of information, by its sheer volume, makes it difficult to sift through the many resources and assess their reliability (Keiser, 2010; Law, 2009). Libraries should grasp the opportunities presented by social networking tools to provide the services for which they have been trusted in the past in a more relevant environment, namely the teaching of information literacy skills and the acquisition and management of trusted sources of information to equip students with the skills to meet the demands of a future workforce (Law, 2009; Ministry of Education, 2010).

As library resources become increasingly digital and available online 24/7 and print collections remain static or dwindle there has been much speculation about the future of the library as place and the services of librarians (Harle, 2009; McDonald, 2010). However it has become evident that the demand for a physical space where students can meet together or study quietly continues to grow. Increasingly libraries are reducing print collections and utilising the space for collaborative learning and study space for students. To meet the varied needs of the new generation learners it is important that the library is both easily accessible and aesthetically pleasing but more importantly that it provides functional spaces that are adaptable and conducive to learning. The provision of the latest technology that is interactive, efficient and within easy reach of support services will further enhance the student learning experience (McDonald, 2010).

2.2.2 Scholarly publishing

The cost of electronic databases and publisher bundled online journal subscriptions have increased dramatically in recent years to the point that even the wealthiest of university libraries such as Harvard are considering cancellations (University Leadership Council, 2011). In recent months opposition to the unsustainable cost of subscriptions has grown with approximately 11,000 researchers signing a petition to boycott journals owned by one of the largest academic publishers.

The call for open access publishing has grown with support from research funders and academics and the UK government has now committed to making all taxpayer-funded research in Britain freely available in the public domain. Libraries have for some time encouraged academics to make their research outputs freely accessible via library-managed institutional repositories and open access journals but these moves will have an impact on library budgets. In the past few years the availability of academic books in electronic format has grown significantly and many university libraries have adopted the just-in-time Patron Driven Acquisitions (PDA) model rather that the traditional just-in-case acquisitions model. It is anticipated that in the near future there will be a greater demand for pay-per-view models with access at the chapter or article level (University Leadership Council, 2011).

These changes will impact on the management of library collections and the skills of staff as service models change from a predominantly ownership model to an access model.

2.2.3 Service models

While there is still a demand for traditional face-to-face services within the library librarians are increasingly called on to provide services that support teaching, learning and research beyond the boundaries of the physical space as the demand for virtual services via the library website, mobile technologies and social

networking tools grows (Corley, 1999; Harle, 2009). There is also a need to embed library services in the online workspaces of students and staff, such as online learning portals, in order to provide point-of-need information and services (Corley, 1999; Gill, 2010; University Leadership Council, 2011). It is important that libraries keep abreast of new technological developments and anticipate the needs of their users to equip them for future workforce needs.

Libraries are increasingly making content accessible via search engines such as Google Scholar where it is possible, via link resolver technology, to link back to the library's subscribed resources. A number of librarians have begun contributing content to Wikipedia enabling the provision of links back to their library's content as well as making content available in tools such as Flickr and YouTube (Gill, 2010). The potential of cloud computing or software as a service should be more fully explored to further enhance the user experience by providing rapid and seamless access to the resources they require (Corley, 1999).

The importance of the role of libraries in adding value to learning and teaching within their institutions has always been recognised and this has become even more important with the greater emphasis in New Zealand and other parts of the world on funding models based on student completion rates (Ministry of Education, 2010). As teaching models in universities change and move towards blended models of online and face-to-face teaching, libraries need to adapt to ensure their services remain relevant (Sutherland, Torricelli, & Karg, 2002; Vandenabeele, 2008). To achieve this librarians should take a far more proactive role and engage with academics, IT specialists and online learning specialists to ensure they are equipped to provide relevant and innovative services at the point of need (Harle, 2009; Keiser, 2010; Law, 2010; Sutherland et al., 2002; Vandenabeele, 2008).

2.2.4 Library staff skills

Libraries have for a long time been actively involved in teaching information literacy skills to equip undergraduate and postgraduate students with the skills to "locate,

evaluate, manage and retrieve information"(Sutherland et al., 2002, p. 204). These skills have become ever more important as the knowledge landscape grows in volume and complexity (Law, 2010). For some time information literacy has been acknowledged as an important graduate attribute (Sutherland et al., 2002) but it is timely to look more broadly at academic literacy which takes into account areas such as digital rights management, copyright, accessibility compliance, reference citation and plagiarism. These are all areas in which librarians are well-versed and could provide assistance to staff and students (Sutherland et al., 2002).

Most of the digital content that libraries have dealt with to date is digitised print content but born digital content is increasing at an unprecedented rate and libraries need to come to terms with managing it. Law (2009) suggests that there are three areas that need consideration. Firstly, they need to work with staff across the university who have the necessary skills to deal with "information creation, storage, management, security, retention and disposal" (Law, 2009, p. 62). Secondly, there is a need to oversee the development of university-wide policies to govern "information security, information retention, bibliographic integrity, data access, data mining, standards, data asset management, archiving and compliance" (Law, 2009, p. 63). Thirdly, there will be a need to make the digital content infrastructure as "flexible, adaptable, interoperable and scalable as possible" by "promoting new tools and standards for the organization, from storage optimization, unstructured data search and database analytics to resource pooling (aggregation) and management and security tools" (Law, 2009, p. 63).

2.2.5 Research support

Academic libraries have traditionally played an important role in supporting researchers by providing access to the resources and services they require (Keiser, 2010). Over recent years funders and subsequently universities have placed greater emphasis on the importance of research outputs and at the same time there have been significant changes in scholarly communication. Lewis (2010) posits that with the increase in electronic resources and discovery tools the

relationship between libraries and their researchers has changed as they no longer need to come to the library and the need for in-depth research assistance has decreased. However researchers are increasingly being supported by the library in other ways such as data curation and the provision of institutional repositories for research outputs.

Most university libraries have developed digital repositories to store and provide access to the university's research outputs including theses, conference presentations, journal articles and research papers. In most cases the content of these repositories is harvested by various search engines which increases exposure to the university's research outputs (Harle, 2009). In the case of New Zealand universities these repositories provide access to the research outputs for the Performance Based Research Funding process.

The growth of the internet and Web 2.0 technologies have offered greater opportunities for international collaboration between researchers and the sharing of not only research outputs but research data too. This raises a number of questions around whether libraries have a role to play in the management and curation of research data (Herman & Gioia, 2001). There are two sides to this argument; on the one hand the library is fulfilling its duty of making accessible the published research knowledge base of which the data is a part, but on the other hand the sheer volume of data as well as the culture shift this represents is a job too large for libraries to tackle alone (Herman & Gioia, 2001). In most instances data is probably best managed nationally or internationally with librarians taking responsibility for providing advice to researchers on the various aspects of data management including awareness raising, teaching data literacy and developing data policies and curation capacity (Herman & Gioia, 2001). This an area that requires greater attention in New Zealand as it is lagging behind other countries at present due to lack of funding and expertise.

2.2.6 Accountability

Like the rest of the university the library is required to demonstrate its value within the university, however it is not easy to obtain quantitative measures that demonstrate the library impact on teaching, learning and research outcomes (Oakleaf, 2010; Sutherland et al., 2002). Most libraries rely on qualitative measures such as client satisfaction surveys to obtain feedback on services and resources and implement continuous change and improvement. While they are useful for this purpose there is a growing need to more accurately measure library impact on student success rates and research impact (Buerhaus, Staiger, & Auerbach, 2000; Sutherland et al., 2002). It is necessary to understand who is using library services and more importantly who is not and why and to what extent this is impacting on their success as a student or researcher (Buerhaus et al., 2000; Keiser, 2010). The ACRL Report on 'The value of academic libraries' suggests a number of steps that libraries can take to demonstrate their value including collecting information on user behaviour and linking this to retention and completion rates, tracking library contributions to research projects and measuring the degree of support for teaching staff to note a few (Oakleaf, 2010). The problem with all of these suggestions is the difficulty of linking student data such as grades with library usage data, which is partly a privacy issue but also one of linking the two systems (Buerhaus et al., 2000). The University of Wollongong Library's success in achieving this link appears to be ground-breaking and will serve as a model for other libraries wishing to embark on these measures (Cox & Jantti, 2012). Their work to date has elicited data on the correlation between student usage of library resources and improved grades and they have also been able to break this down by various categories such as level of study, gender, age and faculty (Buerhaus et al., 2000; Cox & Jantti, 2012; Oakleaf, 2010).

2.2.7   Professional qualifications

The relevance and value of professional library qualifications have been questioned as the demand for highly skilled, e-savvy librarians is becoming more important to deal with the new challenges facing the profession.

Traditionally librarians have been expected to hold a professional library qualification with various options available at diploma, degree and postgraduate level. The preferred option for university libraries is generally a Masters level qualification in library and information studies (MLIS) as well as an undergraduate degree in their subject specialisation (Hallam, 2008). However there is some debate as to whether this will continue to be the case for all library staff as their roles become increasingly diverse and more technologically focused, with other professional qualifications possibly being more relevant (Lewis, 2010).

Concern has been expressed about the disconnect between the competencies of new library graduates and the requirements of employers. In the Canadian 8Rs human resources study participants felt that adequate training in areas such as leadership, management, business and technological skills was lacking as was the opportunity for practical experience (Sivak & De Long, 2009). Very similar responses were elicited in the Nexus study conducted in the Australian library sector (Hallam, 2008). Respondents to both surveys agreed that there should be greater communication between the education providers and the industry and that the education providers should respond more quickly to environmental changes (Hallam, 2008; Sivak & De Long, 2009). A recent study conducted in the United Kingdom concluded that there should be a balance between theoretical content and practical and vocational skills. Theoretical content is important as it provides an understanding of the context of librarianship, particularly in the present rapidly changing environment. The practical skills are useful in preparing new graduates for the work environment (Simmons & Corrall, 2010).

Research in the USA has produced interesting demographics about LIS graduates which anecdotally match those in other parts of the world, including New Zealand. The numbers of graduates has remained relatively steady over the last few decades but there are indications that a reasonable number are moving into jobs outside of libraries (Hardesty, 2002). Approximately 70% of the graduates are female and this has remained fairly constant despite the increased career options for females in other fields (Hardesty, 2002). Librarianship is often a second career and this is reflected in the fact that many of the graduates are over the age of thirty or in many cases even older when they enter the workforce (Hardesty, 2002; Lewis, 2010).

While employers and new graduates continue to express concerns about the relevance of the LIS qualifications there is growing evidence that these qualifications may become less relevant in the 21st century library and that the composition of library staff will look very different with the emphasis being on technology, subject specialist and data management skills as well as soft skills such as adaptability, flexibility, initiative and team work (Lewis, 2010; Partridge, Lee, & Munro, 2010).

In the context of the issues and trends affecting both the wider university and libraries it is important to ensure there is a workforce plan in place to identify and develop the skills required within the workforce to meet these challenges and opportunities.

2.3   Workforce Planning

It is important that the workforce planning process is integrated into and aligned with the strategic direction of the organisation as this provides a framework for managers to make justifiable decisions about the types of jobs and the competencies and skills required for present and future needs within budgetary constraints (Boxall et al., 2003; Business and Economic Research (BERL), 2010; Gruman & Saks, 2011). People are an important strategic resource for an

organisation in both the short and long term and this needs to be taken into account in workforce planning (Business and Economic Research (BERL), 2010). However with the increasing complexities of the rapidly changing employment environment "workforce planning is becoming a more complex and challenging activity" for organisations (Boxall et al., 2003, p. 78).

The workforce planning process involves assessing the skills required by the organisation and analysing the internal and external market to ensure that it has the right number of people with the right skills, experience and competencies in the right jobs at the right time to meet the current and future needs of the organisation (Boxall et al., 2003; Stokker & Hallam, 2009). An effective workforce plan takes into account the recruitment, retention and training and development of employees as well as demographic and diversity issues to contribute to an improvement in the effectiveness of the organisation (Business and Economic Research (BERL), 2010; Gruman & Saks, 2011). One of the challenges of workforce planning is to build a workforce that is flexible, adaptable and able to anticipate and embrace the changing environment and take the organisation forward (Graham & Duffield, 2010).

The flowchart below illustrates the workforce planning process which includes the following steps:
1. The organisational business plan – the workforce plan should be an integral part of the strategic business plan.
2. Identifying the types and scale of activities to be carried out by the organisation and any present and future changes required.
3. Demand forecasting to estimate the requirements in terms of the types of jobs, the number of people and competencies required to meet the future requirements of the business plan.
4. Supply forecasting to estimate the number of people available either within the organisation or externally with the required competencies as well as an assessment of the labour market with regard to demographics and competencies.

5. Forecasting requirements by conducting a gap analysis to establish the skills shortages or surpluses.

Action planning involves developing plans to deal with the anticipated gaps through succession planning, external recruitment and training and development. Retention and flexibility strategies should also be planned for. It may also be necessary to plan for some downsizing.

Workforce Planning Flowchart (adapted from Armstrong (2011) p. 226

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                    ┌─────────────┐
                    │ Strategic Plan │
                    └─────────────┘
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                    ┌─────────────┐
                    │ Forecast of  │
                    │ activity levels │
                    └─────────────┘
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                    │ Analysis of  │
                    │ requirements, │
                    │ numbers,     │
                    │ skills       │
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          ┌──────────┐       ┌──────────┐
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                    ┌─────────────┐
                    │ Forecast of  │
                    │ future       │
                    │ requirements │
                    └─────────────┘
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                    │ Action       │
                    │ planning     │
                    │ -recruitment │
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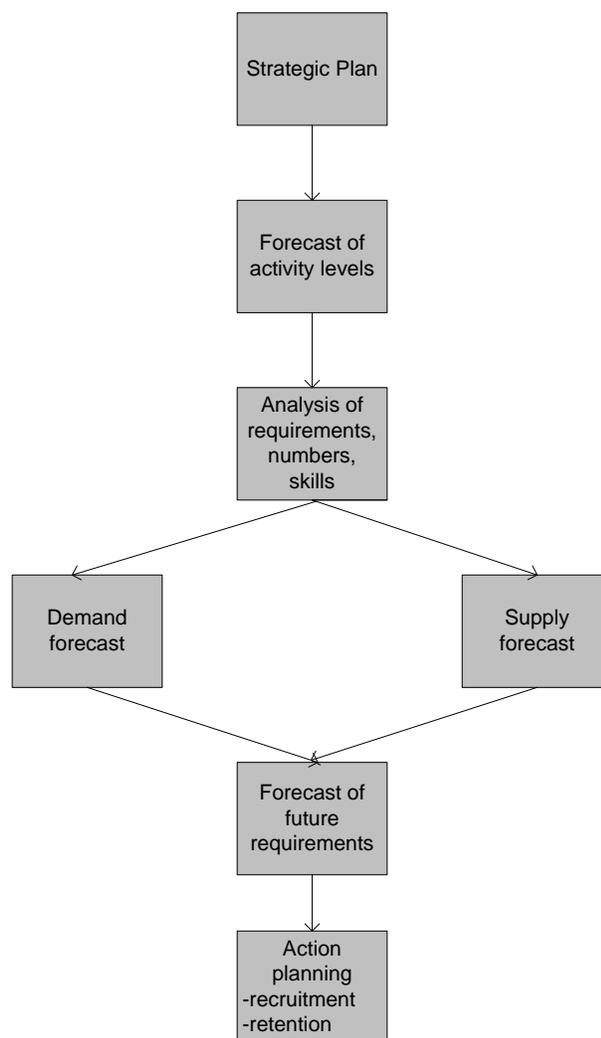
This chart is a useful representation of the workforce planning process but it is important to emphasise that it is not always a linear process but usually requires

some movement backwards and forwards between the various phases as workforce planning is an on-going process that requires constant revision to keep abreast of organisational and environmental changes (Armstrong, 2011).

In recent years much has been written about the anticipated workforce shortages in the nursing profession and a considerable amount of work has been done with regard to workforce planning and retention policies (Dockery, 2004; Graham & Duffield, 2010; Palumbo, McIntosh, Rambur, & Naud, 2009). More recently a report with recommendations for workforce planning initiatives for the academic workforce in New Zealand universities has been released (Business and Economic Research (BERL), 2010). There has been some research into the area of workforce shortages in academic libraries in other parts of the world such as Australia, Canada, the United States and the United Kingdom (Hallam, 2007). However to date there has been no formal research on these issues in New Zealand university libraries.

Parallels can be drawn between the nursing and library professions as both are predominantly female professions with an ageing workforce and concerns with attracting younger staff to the profession (Fairlie, 2011; Massis, 2010; Whan, 2011). Traditionally feminised professions such as nursing, teaching and librarianship have increasingly faced competition for employees, as the range of career opportunities open to women has grown since the 1960s when the Baby Boomers (born between 1945 and 1965) entered these professions. This cohort of employees is still the largest today (Fairlie, 2011).

In November 2010 the 'Academic Workforce Planning for Universities New Zealand Human Resources Committee Report' was released in response to concerns that the academic workforce trends could jeopardise the ability to maintain world-class university research and teaching in the twenty-first century (Business and Economic Research (BERL), 2010). This report could be a useful starting point for workforce planning in academic libraries as the strategic and contextual issues are common across the sector. These issues include the ageing

workforce, the importance of becoming an employer of choice and the need to create an attractive career development pathway to recruit and retain a talented workforce (Business and Economic Research (BERL), 2010).

In light of the issues and trends discussed above there are a number of workforce planning factors that university libraries need to consider. These include the ageing workforce, becoming an employer of choice, recruitment, remuneration, retention and turnover, employee engagement, performance management, training and development, retirement and leadership and management skills in an increasingly diverse workforce (Brown, 2006; Gordon, 2010; Maxey-Harris, Cross, & McFarland, 2010; Munde, 2010; Nixon, 2008).

There is sometimes confusion about the difference between succession planning and workforce planning both of which play an important role in the strategic planning of organisations. Succession planning deals more specifically with the identification and training of internal staff members for key leadership positions in the organisation (Rasmussen, Haworth, & Andersen, 2010). Workforce planning goes beyond this and plans strategies for educating, recruiting, retraining, training, developing and mentoring staff to meet the future needs of the organisation (Rasmussen et al., 2010). In fact succession planning can be considered as an integral part of workforce planning (Boxall et al., 2003).

2.3.1 Succession Planning

Succession planning is a structured, on-going process used to identify, assess and develop potential leaders to take on leadership roles within the organisation when the need arises (Barnett & Davis, 2008; Phillips & Gully, 2009). However, succession planning, like workforce planning, is not always given the priority it should within organisations. However with the impending retirement of older workers and the apparent dearth of younger workers to replace them it is something that organisations need to take more seriously (Barnett & Davis, 2008; Groves, 2007).

The prospect of a large cohort of senior leaders retiring from the library profession in the near future means that succession planning should be an integral part of the organisation's strategic plan. This will ensure that strategies are in place to facilitate the transfer and retention of organisational knowledge and continuity of leadership (Barnett & Davis, 2008; Crumpacker & Crumpacker, 2007; Phillips & Gully, 2009). Continuity of leadership provides the organisation with enhanced opportunities to develop a long-term plan for growth and change in order to keep pace with industry developments and challenges (Coonan, 2005; Phillips & Gully, 2009).

Focusing on leadership development across the whole organisation rather than focusing on specific individuals or positions encourages staff to engage in leadership in their present role as well as providing a wider pool of talent in case of unanticipated changes (Barnett & Davis, 2008; Galbraith, Smith, & Walker, 2012). It is also important that consideration is given to positions at various levels and not just the top positions in the organisation. Cross-training across functions can also be advantageous to increase the pool of successors (Barnett & Davis, 2008; Groves, 2007). Leadership development and mentoring programmes should be an integral part of the succession plan and require buy-in and participation from the existing managers to ensure that this is achieved (Coonan, 2005; Groves, 2007). Leadership forums and courses, as well as formal and informal mentoring programmes that develop skills and competencies will encourage the personal growth of potential leaders and increase their commitment to the organisation (Groves, 2007).

Academic libraries are facing many of these issues and thus should give serious consideration to succession planning. Moran et al. (2010) point out that there is concern with the impending retirement of older workers and the fact that there are too few mid-career or younger librarians to take over the resulting leadership vacancies. Galbraith et al. (2012) note that many academic librarians would prefer to focus on their area of speciality rather than assume leadership responsibilities.

Thus potential talent may be missed if employees are not encouraged to develop their leadership skills as part of an organisational succession plan (Galbraith et al., 2012).

2.3.2 Ageing workforce

The ageing workforce presents a number of challenges for universities along with other sectors such as the nursing profession as previously mentioned, with regard to retention and retirement. It is important that while these staff remain in the workforce their skills are kept current and that their needs are adequately catered for in terms of work/life balance, knowledge transfer and where appropriate phased retirement (Hedge, Borman, & Lammelin, 2006). It is also important that steps are taken to ensure that provision has been made to replace these older workers when they do retire in the next ten to fifteen years (McKinnon, 2010).

In many parts of Europe retirement from as early as the age of fifty or fifty-five has been encouraged to create jobs for younger workers but in many cases this has caused problems due to the lack of knowledge and expertise of these younger employees (Buyens et al., 2009; Munde, 2010; Znidarsic, Penger, & Dimovski, 2011). Older workers have also often been the victims of the restructuring or downsizing of organisations in times of economic crisis as they are considered to be more expensive in terms of salary and training needs. There are also perceptions that they are more likely to suffer from ill-health, be resistant to change and be less productive (Buyens et al., 2009; Hedge et al., 2006). However Znidarsic et al. (2011) argue that this is not necessarily the case. They suggest that many older workers are passionate about their jobs, are keen to learn new skills and take on challenging projects. Generally turnover rates are lower amongst this group which reduces recruitment costs (Znidarsic et al., 2011).

The Baby Boomers are living longer than previous generations and the younger generations are smaller in population size due to birth rates dropping, at least in first world countries. Thus the issue of sustaining social security systems to support

the older generation is becoming an increasing concern and many countries are now encouraging employees to delay their retirement. (Buyens et al., 2009; Hedge et al., 2006; McKinnon, 2010). Many countries have raised the official retirement age but this has not happened in New Zealand yet. Statistics also show that the younger generations are entering the workforce later than previous generations as a result of studying for longer periods which also impacts on social security contributions (Buyens et al., 2009).

If the workforce is to be maintained at full capacity in the future, organisations may need to adopt policies and practices that encourage older workers to remain in the workforce for longer. In fact many organisations are already looking at ways to retain older workers and benefit from their knowledge and expertise (Hedge et al., 2006; Koc-Menard, 2009; McKinnon, 2010).

Research has also shown that older workers are more open to remaining in the workforce longer as they are healthier and more active than previous generations. With the prospect of living longer they are also concerned about their financial security (Hedge et al., 2006; Munde, 2010).There has been debate about the declining abilities of people as they age but research shows that this is not necessarily the case due to the fact that their accumulated experience and expertise can compensate for any cognitive decline (Hedge et al., 2006).

There are a number of options available to encourage the retention of older workers including training and development opportunities, job redesign, targeted recruitment, the provision of new challenges, mentoring opportunities which encourage knowledge transfer and flexible retirement options (Buyens et al., 2009; Hedge et al., 2006; Koc-Menard, 2009; Munde, 2010). Znidarsic et al. (2011) argue that a good communication strategy is essential to understand and cater for the individual needs of these employees and thus increase their job satisfaction and organisational engagement and effectiveness.

The ageing workforce is a concern for university libraries, as has been shown by various studies in Australia, Canada, the United Kingdom and the USA. While this is an issue in many sectors the Bureau of Labor Statistics in the USA noted that librarians, on average, tend to be older than workers in other sectors (Munde, 2010). The Nexus study of Australian libraries conducted in 2006 indicated that 49.9% of librarians were over the age of 46 years (Hallam, 2007). The 8Rs Canadian Library Human Resource Study conducted in 2005 found that almost half of the library workforce was over the age of 50 years (Sivak & De Long, 2009). The BERL report indicates that the academic workforce is older than the total workforce in New Zealand as well as other professionals including the health professions about which much has been reported in recent years (Business and Economic Research (BERL), 2010). Although there are no conclusive statistics about the age of librarians in New Zealand the anecdotal evidence would suggest that they are very similar to those mentioned here.

Perhaps the most obvious impact is that many of this cohort are likely to retire over the next ten to fifteen years (Department of Labour, 2009, 2010; Moran & Marshall, 2010; Munde, 2010). With the large numbers predicted to retire Moran (2010) notes that there will be a need to assess whether the workforce will be large enough and skilled enough to meet the needs of academic libraries of the future. On the other hand there are indications that the Baby Boomers who make up the ageing workforce are in many cases delaying their retirement plans predominantly for financial reasons related to the economic downturn in recent years (Department of Labour, 2009; Munde, 2010). While both these studies were conducted in the United States of America there is reason to believe that this may well be the case in other parts of the world including New Zealand with the spread of the economic recession worldwide.

2.3.3 Recruitment

Having considered the supply and demand forecast as part of the workforce planning process and established the future needs of the organisation it may be

necessary to recruit externally. This will necessitate designing a recruitment strategy to identify the skills and competencies required and devise a plan to recruit the right people to meet these needs (Business and Economic Research (BERL), 2010). This should be a carefully planned process to ensure that talented people are attracted and recruited to the vacant positions. Information about the positions should outline the skills and competencies required for the job, the remuneration package including salary and other benefits, career development and training opportunities as well as relevant information about the organisation (Business and Economic Research (BERL), 2010; Phillips & Gully, 2009).

It is important that managers keep abreast of new trends and developments so that they have a clear understanding of the skills and knowledge required to provide services that meet the needs of the library of the future (Kealy, 2009; Lewis, 2010; Parry, 2008). Some of these skills may be available internally but in many cases they will need to be recruited externally particularly as the range of skills may well be beyond those of traditional librarians (Lewis, 2010).

The prospect of the older workers retiring impacts on the need to adopt creative approaches to recruit and retain a skilled workforce that will enable the profession to move forward and prosper in a very competitive labour market (Hallam, 2007; Moran & Marshall, 2010). At the same time there are concerns about recruiting younger librarians into the workforce with many of the older workers staying in the workforce for longer which means there are insufficient vacancies being created to allow them the time and opportunities to gain the necessary experience to move into the senior management positions when the present incumbents retire (Munde, 2010).

Academic libraries need to become more adept at marketing and promoting themselves and their institution in order to attract the best and brightest staff with the knowledge and skills required for the job (Hardesty, 2002; Parry, 2008). This may also help remove the negative and mostly false image of the profession being too traditional and not keeping up-to-date with technological developments and also stave off some of the competition from other organisations who find these

skills attractive. It is important to promote the fact that in reality librarians are very often the leaders in innovation and technology in the university environment as this would hold appeal for many potential applicants (Hardesty, 2002; Parry, 2008).

Recruitment to the library profession is an aspect that deserves some attention as many libraries are experiencing a shortage of suitably qualified applicants with the necessary skills to meet their current and future needs (Hewitt, Moran, & Marsh, 2003). There are conflicting opinions and some speculation as to why this is the case as there does not appear to be a significant drop in the number of library graduates (Hardesty, 2002). Hewitt et al. (2003) posit that a number of these graduates move into positions in others areas such as information management rather than traditional library positions. However Hardesty (2002) argues that this is not the case but rather that there are a greater number of vacancies due to increased number of retirements from the profession. University libraries should take advantage of the opportunities they have to attract talented people to the profession by encouraging university graduates who may be working as library assistants, students working part-time in the library while studying as well as high school students considering career choices to consider a career in libraries as there is scope for many roles beyond those requiring a professional library qualification (Hardesty, 2002; Maxey-Harris et al., 2010; Walker, 2011).

2.3.4 Employer branding

Traditionally branding has been used by organisations as a marketing tool to sell their services or products in a competitive market. It is often linked to the business strategy and aims to identify the point of difference from other similar products in the marketplace (Phillips & Gully, 2009; Sutherland et al., 2002). However more recently this concept has extended to include the development of an employer brand used to attract and retain talented staff. It is becoming increasingly important to identify what is unique and special about the organisation, what sets it apart from its competitors and emphasise why it is a good place to work to recruit and

retain talented staff (Backhaus & Tikoo, 2004; Business and Economic Research (BERL), 2010; Phillips & Gully, 2009; Sutherland et al., 2002).

Employer branding should include information about the culture of the organisation and its core values and information about current employees. However it is essential that the information provided is an accurate and honest representation of the organisation if new recruits are to be retained (Backhaus & Tikoo, 2004; Business and Economic Research (BERL), 2010). Branding has more commonly been associated with commercial organisations but universities and by implication, university libraries need to pay attention to employer branding if they are going to successfully compete for talented employees in an increasingly competitive and global market.

2.3.5 Employer of choice

Successful employer branding is integral to an organisation becoming an employer of choice to attract, optimise and retain talented employees and gain the competitive edge in an aggressive market, however not all employers understand the concept and capitalise on it (Business and Economic Research (BERL), 2010; Herman & Gioia, 2001). An employer of choice is one who develops a reputation for providing employees with a supportive and stimulating work environment so that it becomes the first choice workplace for excellent candidates (Sutherland et al., 2002).

Herman and Gioia (2001) list a number of advantages that employers of choice have over their competitors:
- Recruitment and marketing costs are reduced as prospective employees are more likely to approach the organisation seeking employment opportunities and thus create a waiting list of talented applicants for vacancies that arise
- Higher quality applicants will be attracted to the organisation when vacancies are advertised

- Talented, committed employees will ensure increased productivity and performance
- Greater loyalty is likely when employees have chosen to work in the organisation and this will result in lower turnover rates
- Employers and employees are likely to be less stressed if they are happy in the workplace and this will contribute to a reduction in conflict, absenteeism and turnover
- Staff continuity ensures greater retention of workforce knowledge and skills
- A stable organisation is more attractive to both investors and customers

To gain and maintain a reputation as an employer of choice the organisation needs to treat its employees well and this may mean removing some of the traditional status barriers such as managerial privileges, formal dress codes and access to information which particularly appeals to younger employees. This also links in with the idea of a more collaborative leadership model (Wright, 2010). Visionary and inspired leadership, meaningful and challenging work, career growth and development opportunities, work/life balance options, excellent communication, fair treatment and reasonable compensation and benefits are all important characteristics of an organisation that is an employer of choice (Herman & Gioia, 2001; Sutherland et al., 2002). Many organisations today are committed to a corporate social responsibility strategy which includes developing policies around being environmentally and fiscally responsible and establishing ethical and social standards and for those committed to sustainability this will also contribute to an organisation being an employer of choice (Gill, 2010).

This is an area that has not been a priority for libraries in the past but deserves serious consideration as they seek new workforce skills and expertise in the future. Being an employer of choice and making the library an attractive place to work is important to attract staff to the profession in light of the generally "negative image of the profession", the "less than competitive salaries" and "the increased competition from other sectors" (Li & Bryan, 2010; Stokker & Hallam, 2009, p. 562). It will also enhance the ability to recruit and retain talented staff who are skilled and

adaptable and able to offer excellent service and expertise to library clients (Li & Bryan, 2010). Attracting a talented work pool allows the organisation to succession plan and grow their own leaders rather than recruiting talent in an increasingly competitive market (Nixon, 2008).

2.3.6 Retention

The reasons for people staying with an organisation are very often the same as those that attract people to the organisation so it is helpful to be aware of this when designing a retention strategy for the organisation (Business and Economic Research (BERL), 2010; Phillips & Gully, 2009). An organisation that is able to retain talented employees because they are stimulated and productive in their jobs will be far more attractive to new talent (Phillips & Gully, 2009).

There are a number of factors that should be considered when developing a retention strategy including job satisfaction and interesting work, effective performance management, access to and support for training and development, promotion opportunities, mentoring programmes, good organisational communication, flexible work options and good remuneration and benefits packages (Business and Economic Research (BERL), 2010; Phillips & Gully, 2009; Strothmann & Ohler, 2011). Effective orientation and socialisation into the organisation have been shown to influence the retention rates for new employees (Chapman, 2009; Williams, Harris, & Parker, 2008).

Job satisfaction and interesting, challenging work are acknowledged as being important retention factors, particularly for younger staff members who do not necessarily feel the same loyalty towards an organisation as their older colleagues (Boxall et al., 2003; McGuire, By, & Hutchings, 2007; Strothmann & Ohler, 2011). Boxall et al. (2003) found that interesting work is one of the most important factors in job retention amongst employees in New Zealand and conversely the lack of interesting work is one of the main reasons for people leaving the organisation. Thus it is an important factor for library managers to take into consideration when

looking to become an employer of choice. Employee engagement is closely linked with retention and turnover in an organisation and has attracted increasing interest amongst human resource professionals in recent years (Fairlie, 2011; Gruman & Saks, 2011).

Retention of the knowledge and expertise of the ageing workforce in libraries is an important consideration as they begin to make retirement plans (Kealy, 2009). At the same time retention of younger workers can be a real challenge as they are more likely to leave if they perceive there to be lack of opportunities to advance their career. Evidence shows that they may well leave the profession altogether (Nixon, 2008).

2.3.7 Employee engagement

If talented employees are to be fully engaged with the organisation they need to have a clear understanding of the mission, vision and strategic goals of the organisation. This can be enhanced by offering them opportunities to contribute to the development and implementation of the strategic plan (Armstrong, 2011; Phillips & Gully, 2009). Regular and open communication and consultation across all levels of the organisation is important at all times and particularly during periods of organisational change (Armstrong, 2011).

One of the challenges is to recognise what motivates and engages individual staff as this may be different for different people. Once established this information may be used to harness and increase the productivity of both individuals and teams (Patota, Scharwtz, & Schwartz, 2007). Work/life balance, flexible work arrangements and a degree of autonomy which allow for some control of one's work arrangements have been shown to be important motivators (Phillips & Gully, 2009; Williamson, 2008). This may mean flexible days or hours of work, working from home or remote locations or a combination of these options (Williamson, 2008). Boxall et al. (2003) also found in their survey that work/life balance opportunities were an important aspect of employee engagement and retention

and that almost half the respondents cited the lack of work/life balance options as a reason for moving on. By contrast Parkes and Langford (2008) found that work/life balance was not a strong motivator of employee engagement and that an understanding of the organisation's mission and values and effective change management processes were far more important. In fact they found that staff who are highly engaged in a supportive work environment may be prepared to forgo work/life balance arrangements to meet organisational goals (Parkes & Langford, 2008). This study appears to be contrary to most other research in this field, it will be interesting to see whether further research confirms this view.

Meaningful work has also been found to be strongly linked to employee engagement (Fairlie, 2011) and this is linked to job design and the importance of providing "skill variety, task identity, task significance, autonomy and feedback" (Armstrong, 2011, p. 10). Meaningful work and professional development opportunities have been shown to be particularly important retainers for younger employees (Lewis, 2010; McGuire et al., 2007).

2.3.8 Performance management

Performance management is another important aspect of employee retention and engagement and should be a priority for managers if this is to be achieved. Gruman & Saks (2011) argue that "leaders are a vital ingredient in the success of performance management" and that their engagement with employees increases their "motivation to improve" (p.131).

Employees and managers need to agree on the performance goals and be clear about how these can be achieved. The goals should be regularly reviewed to ensure that they remain relevant and attainable (Armstrong, 2011; Gruman & Saks, 2011; Macky, 2008). Performance goals should be aligned to the strategic goals of the organisation and closely aligned with the job description (Chan, 2006).

Setting high expectations which provide challenges and encourage employees to perform more effectively in their jobs are good motivators (Gruman & Saks, 2011; Westerman & Yamamura, 2006). This can be achieved by allowing individuals a degree of autonomy in their jobs, providing them with the necessary resources and equipment and making them accountable in their jobs (Herman & Gioia, 2001; Parry, 2008).

Open, honest and constructive feedback that is delivered on a regular basis is important in making staff feel valued. Problems should be dealt with when they occur and not be delayed until the annual performance review (Armstrong, 2011; Herman & Gioia, 2001).

Performance management is of particular importance for those whose performance needs to be improved, as can be the case for longer-serving staff members. The process should be used to identify training and development needs and an on-going monitoring process put in place to ensure that the goals are achieved (Wood, 2007). In extreme cases where performance does not improve despite these corrective measures being put in place it may be necessary to implement a dismissal process (Macky, 2008).

The dismissal process is reliant on a "systematic, objective and job-related performance appraisal process" that can stand up in a court of law as it may well be challenged by the employee, particularly if they have been in the job for a lengthy period and such issues have not been raised previously (Hedge et al., 2006, p. 146).

2.3.9 Training and development

The provision of training and development opportunities are an essential element in workforce planning and it is important that the training and development plan is linked to the organisation's strategic plan to ensure that it is relevant (Kealy, 2009; Zauha & Potter, 2009). The strategies for moving forward include identifying the

key competencies required for the library of the future and the development of a training and development plan to equip staff with the necessary skills to achieve this vision (Keiser, 2010; Zauha & Potter, 2009). The workforce demographic is an important consideration when developing a training and development plan as training needs and methods should be adapted to cater to the diverse needs of the staff (Kealy, 2009).

Training and development should include orientation and socalisation for new employees as this initial training when they join the organisation contributes to engagement and retention (Armstrong, 2011; Chapman, 2009). It is important that induction and orientation is well planned to ensure that the new employee is well integrated and has a clear understanding of the expectations of the job (Chapman, 2009).

In most libraries, as across the rest of the university, due to budget constraints, there are limited opportunities to create new positions to attract staff with the necessary technological skills so existing positions may need to be redeveloped and staff trained up to meet these requirements (Stokker & Hallam, 2009).

The provision of career development and promotion opportunities can be particularly challenging in organisations such as universities, that have relatively flat hierarchical structures meaning promotion opportunities are limited (Business and Economic Research (BERL), 2010). Providing opportunities for cross-training and gaining broader experience across the organisation through project management, for example, can encourage retention of talented staff (Business and Economic Research (BERL), 2010; Phillips & Gully, 2009). With reference to library staff Munde (2010) points out that it will be difficult to retain talented younger librarians if they are not able to see a challenging career pathway ahead of them, with necessary training and development opportunities.

2.3.10 Leadership and management development

The success of any organisation is dependent on the quality of its leaders and managers thus leadership and management development is a vital element of strategic human resource management (Dessler, 2012; Macky, 2008; Phillips & Gully, 2009).

It is important that leaders are able to anticipate future developments in their area of expertise and experience to prepare the organisation and its employees for the changes (Wright, 2010). However Wright (2010) also points out that due to the many and varied management and leadership theories in today's world there is some confusion about the skills required for competent, innovative leaders who are able to move the organisation forward.

Leadership and management programmes usually consist of various approaches such as formal courses, either internal or external to the organisation or a university qualification such as an MBA, as well as coaching and mentoring opportunities (Dessler, 2012; Macky, 2008).

Mentoring programmes are an important aspect of developing the leadership skills of younger librarians and should complement structured leadership programmes (Gordon, 2010; Graham & Duffield, 2010; Lipscomb, Martin, & Peay, 2009; Sheehy, 2004). In recent years many libraries and library associations around the world have developed leadership programmes and institutes in response to this need including the Aurora Institute in Australia, the Future Leaders Programme in Ireland, Synergy in Illinois and the Library Leadership Development Programme at the University of Saskatchewan (Fallon, Maxwell, McCaffrey, & McMahon, 2011; Sheehy, 2004; Williamson, 2009).

 It is often necessary to 'shoulder tap' and encourage emerging leaders, as they do not always recognise their own potential or are not confident enough to step

forward to attend a leadership programme. These programmes have been shown to have value in preparing staff for senior management positions (Arnold, Nickel, & Williams, 2008). However, these courses in isolation are not sufficient, they need to be followed up with on-going mentorship, networking with colleagues and project and other leadership opportunities (Arnold et al., 2008; Fallon et al., 2011).

Increasingly replacing older workers in leadership and management positions is going to present a real challenge for organisations. Research in the Australian library sector shows that about 60% of those planning to retire in the next five years are in senior and middle management roles while only 10% of the younger staff indicated the desire to move into a senior management role within the next ten years (Hallam, 2007). This raises concerns about whether there will be sufficient staff with the knowledge, skills, experience and interest to replace those in these leadership positions (Hallam, 2007; Munde, 2010). As discussed previously succession planning is important for the development of leadership skills within the organisation to encourage younger staff to step into leadership roles when the current leaders retire (Nixon, 2008; Zauha & Potter, 2009).

2.3.11 Remuneration

Remuneration or compensation, in other words the total pay package, including monetary and non-monetary rewards does have a role to play in recruitment and retention. However it is fairly widely acknowledged that it is not usually a 'make or break' factor on its own. It is important that remuneration is fair and equitable across the sector to attract and retain talented staff. It is also important to ensure that it is seen to be fair within the organisation and that jobs at the same level are equally compensated (Armstrong, 2011; Dessler, 2012). Fair pay has been found to be important for recruitment and retention alongside interesting work and a good working environment. However at the same time it is not usually the most important reason for employees leaving the organisation (Boxall et al., 2003; Moran & Marshall, 2010).This needs to be balanced against pay-for-performance strategies

which are linked with performance management and talent management strategies (Armstrong, 2011).

The remuneration package should be clearly communicated to prospective and existing employees so that they are aware of the full range of benefits that make up the package (Macky, 2008; Phillips & Gully, 2009). These benefits may include extrinsic rewards such as base pay, incentive pay and other financial benefits such as parking or transport as well as intrinsic rewards such as the job satisfaction, flexibility and employer recognition (Armstrong, 2011; Lepak & Gowan, 2010).

Remuneration for librarians has traditionally not been very competitive but research shows that in most cases this is not a major factor for those considering librarianship as a profession (Hardesty, 2002; Stokker & Hallam, 2009). Studies in Canada and Australia indicate that librarians agree that salaries are adequate but not sufficiently competitive (Hallam, 2008; Sivak & De Long, 2009). Intrinsic rewards such as a- good work environment, intellectual stimulation and work/life balance options have been cited as more important than high salaries, particularly for people who enter the profession as a second career (Hardesty, 2002). However competitive remuneration has been shown to be more of a concern for the younger generation librarians (Lewis, 2010; Sayers, 2007). This has been attributed to the fact that there is greater competition for their skills in the market place and also that libraries will need to employ staff with more specialist skills in the future (Lewis, 2010).

2.3.12 Diversity

As the population in New Zealand and Auckland, in particular, as in many other parts of the world becomes increasingly diverse it is preferable to have a workforce that reflects the clients served by the organisation (Maxey-Harris et al., 2010). This has traditionally been a difficult task for libraries but one solution may be to tap into the pool of student library workers recruited on campus and encourage them to consider a career in libraries (Maxey-Harris et al., 2010).

Diversity is not just about different ethnic and cultural groups, it is also about "diversity of opinion, perspectives, skills, knowledge and mindsets" (Li & Bryan, 2010, p. 265). The greater mobility of workers will impact on the diversity of the future workforce as employers search for talented staff more widely (Wheal & Ellard, 2006).

Unlike many other professions, with the exception of perhaps nursing and teaching, the library has a greater proportion of female employees so this aspect of diversity merits some attention. Interestingly, the library profession was originally a male dominated profession. Even though as early as the1900s seventy-five percent of qualified librarians were female it wasn't until the 1970s that females moved into management positions (Moran & Marshall, 2010). Moran et al (2010) also note that once this change occurred far fewer studies on the feminised workforce have been conducted. Like other feminised professions there are a number of issues to consider such as the need for flexibility around family considerations, which sometimes leads to reduced flexibility in terms of changing jobs too. It will potentially impact recruitment and pay as the career options for women continue to increase and improve (Buerhaus et al., 2000; Graham & Duffield, 2010).

The different generations and their expectations will also add to the diversity of the workforce in the future. The Gen X and Gen Y cohorts that research claims are looking for interesting work, training and development opportunities and flexible reward packages are not as loyal to employers as the Baby Boomers (Gordon, 2010; Wheal & Ellard, 2006).

2.3.13 Turnover

Voluntary employee turnover, where an employee makes the decision to leave can be very costly for an organisation particularly when it is a talented employee. Recruitment is a costly and time consuming process and there are also costs

related to the impact on the staff left behind who need to cover the vacancy and then train the new person once they join the organisation (Lepak & Gowan, 2010).

When considering the issue of turnover it is helpful to consider the general trends in New Zealand. Research shows that the workforce in New Zealand tends to be relatively stable, with the average tenure for stayers being in the region of ten years and three years for movers according to the findings of a survey conducted by Boxall et al. (2003). It has been shown that workers are less likely to change jobs as they get older and their pay levels increase whereas younger workers are more likely to move around in search of new challenges and opportunities for career development and to a lesser extent better pay and training and development options (Boxall et al., 2003; Moran & Marshall, 2010; Strothmann & Ohler, 2011; Williamson, 2008).

Turnover rates in the public sector are generally lower than the private sector and this trend is reflected in the turnover rates in academic libraries too. This is borne out by the survey conducted by Strothman & Ohler (2011) where the majority of library managers indicated that turnover amongst professional staff is low, however the authors posit that this may well change as the rate of retirements increases in the near future. The increasing numbers of younger staff employed to replace those retiring could also increase turnover rates as they tend to be more mobile and likely to move on if their needs are not met (McGuire et al., 2007).

It should also be acknowledged that a certain level of turnover is inevitable and necessary and often desirable to move less talented and committed employees on and create opportunities for new blood (Strothmann & Ohler, 2011) . However it is still costly for the organisation in terms of separation, replacement and training costs (Macky, 2008).

2.4   Summary

University libraries in New Zealand, like those in most other parts of the world are facing many challenges to retain their viability in the future. Firstly, the strategic direction of the New Zealand tertiary environment should be taken into account. The issues and trends in this context include raising skill levels, improving productivity levels and building leadership and management skills while taking the ageing workforce and diversity issues into consideration. The need to increase research capacity within New Zealand and by building international partnerships has also been highlighted by the government. University libraries have an important role to play in supporting academic staff to achieve these objectives. However without adequate funding none of this can be successfully achieved and in New Zealand, as in other parts of the world, the global financial crisis is still impacting on budgets and funding.

There are a number of issues and trends facing libraries more specifically as they move forward into the 21st century. The rapid growth in technology and the increasing move from a physical, predominantly print environment to a virtual, digital environment requires a different approach to the services libraries provide. Libraries need to push their services and resources out into the user's workspace to provide a point-of-need service. At the same time there is still a demand for a physical space to meet students' needs for a variety of study spaces equipped with the appropriate technology.

Ensuring that users have the academic literacy skills to find, evaluate and use scholarly resources from the vast amount of information available is a role of growing importance and one for which librarians are well-equipped. Support for researchers is an area that is presenting challenges as technology enables greater collaboration across the globe and necessitates accessibility not only to research outputs but also the underpinning research data. Librarians have expertise to offer in the area of data curation and management.

It is important that library staff are equipped with the necessary skills to deal with the changing landscape which will require a re-evaluation of the current professional library qualifications and whether they are still relevant for all future library positions.

Taking these issues into account raises the importance of workforce planning to ensure that university libraries have the right staff with the right skills in the right jobs at the right time to maintain their relevance in the 21st century.

The ageing workforce presents a number of challenges for libraries including the need for succession planning to ensure that there is continuity of leadership as older workers retire in large numbers in the near future. Catering to their changing needs and ensuring they keep their skills current while they remain in the workforce is important too.

The recruitment and retention of talented staff with the necessary skills and expertise is an on-going challenge and to this end creating an employer brand and becoming an employer of choice are essential in the increasingly competitive global market. Good recruitment strategies need to be supported by good retention strategies to ensure that those talented staff are engaged with and make a valuable contribution to the organisation. Interesting work, effective performance management, fair remuneration and training and development opportunities as well as promotion opportunities all have a role to play in retaining staff and reducing costly turnover.

Chapter 3

Research design

The literature review highlighted a number of issues and trends affecting workforce planning in libraries worldwide including the rapid technological changes that are impacting on service models and the skills staff require to keep abreast of these changes. At the same time libraries are faced with the challenges of an ageing workforce that is working longer but also predicted to retire in large numbers in the next ten to fifteen years. Concerns have been expressed about who will replace them when they leave, particularly in leadership roles.

The aim of this study is to identify the issues and trends affecting workforce planning in university libraries in New Zealand within the context of the tertiary education sector and the vision for the future of universities in the 21st century. While it is anticipated that there will be some similarities to the international findings there has been no formal research undertaken in New Zealand to prove this assumption. It is also important to gain an understanding of the local context to plan for the recruitment and retention of the right staff with the right skills to ensure the transformation of libraries to meet user needs in the future. It will also be interesting to ascertain what workforce planning measures, if any, are already in place in New Zealand university libraries.

University libraries in New Zealand, like the rest of the world are at crossroads with the rapid advances in technology and need to plan for the future if they are to continue to make a viable contribution to the academic community.

This chapter will describe the methodology used for this research project. The epistemology and research method will be explained as will the process of data collection and analysis.

3.1 Epistemology

This study has taken an interpretivist approach as its epistemological philosophy. The ontological or social viewpoint adopted by interpretivists is that there are multiple realities in the social world and that social reality is developed by people's perception of social situations (Matthews & Ross, 2010).
Epistemology considers the relationship between the researcher and the social world and "what counts as knowledge, and on what basis we can make knowledge claims" (Grant & Giddings, 2002, p. 12). Over the past twenty or so years the interpretivist approach has challenged the more commonly accepted positivist approach and has increasingly gained credibility in business and management research (Bryman & Bell, 2007; Myers, 2010). Many researchers in this field feel that the positivist approach which takes a more scientific approach is not always appropriate when dealing with people (Myers, 2010).

The intepretivist approach seeks to understand human nature and the subjective way in which people interpret and understand the social world and social phenomena in their lives and the actions they take as a result (Grant & Giddings, 2002; Matthews & Ross, 2010). The researcher in turn interprets the interview responses and interpretations in terms of his/her own understanding of the social world and social phenomena. Thus it is important that the researcher is able to understand the context of the subject's viewpoint and take an empathetic view when interpreting the data (Matthews & Ross, 2010; Myers, 2010).

Consideration of the 'issues and trends affecting workforce planning in New Zealand university libraries' necessitated the gathering of qualitative data from a group of participants with sufficient knowledge of the topic. The interpretivist approach recognises that the data collected is a subjective interpretation, by the participants, of their knowledge and experience of the reality. The data are then subjected to further interpretation by the researcher to generate theory (Bryman & Bell, 2007; Matthews & Ross, 2010). Bryman and Bell (2007) point out that there is

a further level of interpretation where the researcher's interpretations are "further interpreted in terms of the concepts, theories and literature of a discipline" (p. 21).

3.2   Research method

A purposive sample of a small cross-section of people with knowledge of and experience in the specific area of research were invited to participate in the project (Matthews & Ross, 2010). The sample consisted of three groups of university staff, namely senior library managers, younger qualified librarians (born in or after 1975) and senior human resource managers. However the research findings can only regarded as indicative as this was not a statistically representative sample (Matthews & Ross, 2010).

The senior library managers were invited to participate in the research project as they were able to provide a strategic view of the issues and trends affecting workforce planning in university libraries and have the ability to influence the changes necessary to transform the work of libraries to meet the needs of the future.

There has been concern expressed about the dearth of younger librarians entering the profession so it was important to interview participants from this age group to ascertain what motivated them to take up a position in an academic library, what will encourage them to stay in the profession, where they see themselves in the next 5 – 10 years, what their management intentions are and what they see as particular staff development needs.

The senior human resources staff were invited to provide an overview of university-wide issues and trends and share their insights into workforce planning as it is important to consider the indicative themes in the context of the wider university environment in which the library operates. These interviews covered topics such as university-wide constraints on staffing and turnover rates across the university compared with the library.

Primary data were gathered from the three groups of participants by means of semi-structured interviews. Semi-structured interviews are a common method of data collection amongst qualitative researchers and this was the method selected to gather in-depth information about the participant's understanding and experience of the topic and to encourage them to express their views in their own words (Matthews & Ross, 2010).

A set of common questions was used as guide for semi-structured interviews and these are attached for reference in Appendices 4, 5, 6. The advantage of this method is that while there is scope for new topics or questions to be raised and explored by the participants there is also a degree of consistency across the interviews as in most cases all the questions were covered (Matthews & Ross, 2010; Myers, 2010; Wildemuth, 2009). It is important that the researcher establishes a good rapport with interview participants and allows the conversation flow but uses probes as necessary to keep the discussion on topic and ensure that all aspects of the topic are covered with each participant (Matthews & Ross, 2010).

3.3   Data Collection

The three groups, namely senior library managers, younger qualified librarians and senior human resources managers were identified as a suitable sample due to their knowledge and understanding of the issues and trends affecting universities and workforce planning.

An email invitation was sent to the university librarian at each of the eight New Zealand university libraries inviting them or a nominated senior library manager to participate in the survey. Seven responses were received with five university librarians accepting the invitation personally and two nominating a senior library manager.

Publically available staff lists from the three universities with a campus in Auckland and the researcher's knowledge of which staff might meet the criteria specified for the younger qualified librarians of participants were used to select the group who were invited to participate (see Appendix 1). Twenty-two invitations were emailed to potential participants whom it was thought may meet the age criteria. Positive responses were received from four eligible participants and five further responses were received confirming that the person did not meet the age criteria. It is assumed that most of those who did not respond did not meet the age criteria although there may have been a few who opted not to participate. This was a disappointing response as it was expected that there was a greater number of qualified librarians in this age group. However it does provide some substance to the concerns about the dearth of younger librarians in university libraries.

Email invitations were sent to and accepted by two senior human resources managers based in a university in Auckland and known to have an interest in and experience of workforce planning in universities.

Upon acceptance of the invitation a participant information sheet (see Appendix 2) and consent form (see Appendix 3) was sent to each of the thirteen participants and an interview arranged at a mutually agreeable time, once the signed consent form was received. Face-to-face interviews were held with the Auckland-based participants and telephone interviews took place with those in the other centres. Due to constraints of time and funding it was not possible to conduct all interviews in person. However the researcher felt that due to the nature of the interview the collection of data would not be compromised by the use of the different methods of interviewing particularly as the participants interviewed by telephone were personally known to the researcher.

For ethical reasons the researcher was not able to interview the University Librarian at her own institution as this person is her line manager thus a senior manager was interviewed instead. The researcher emailed a group of younger librarians in the same institution whom it was thought met the age criteria but they

were asked to respond to a third party who also conducted the interviews to ensure that there was no coercion on the part of the researcher. The researcher received anonymous detailed notes from these interviews and the signed consent forms upon completion of the interviews.

The interviews lasted between thirty minutes and one hour with the average being approximately forty-five minutes. With the permission of the participants notes were taken during the interview and more detailed notes were written up at the conclusion of each interview. It was also made clear that no staff or their institutions would be identified in the findings as the university library community in New Zealand is very small.

Time constraints prevented a larger sample of participants being interviewed but this indicative sample provided useful findings that may be built on in the future.

3.4 Data analysis

Thematic analysis was the method used to analyse the data gathered from the in-depth, semi-structured interviews conducted with each group of participants. Thematic analysis is "a process of segmentation, categorization and relinking of aspects of the data prior to final interpretation" (Matthews & Ross, 2010, p. 373). The aim of thematic analysis is to interpret, describe and understand the data and develop themes and codes (Boyatzis, 1998; Matthews & Ross, 2010).

The first step of the data analysis process involved reading through the data several times in order to fully understand it and identify patterns and meanings. The next step was the development of the ninety initial codes (Braun & Clarke, 2006; Matthews & Ross, 2010). The codes developed were theory-driven which means that "the elements of code are derived from the …elements of the theory" (Boyatzis, 1998, p. 33). This is a commonly used approach that is influenced by the researcher's theoretical interest and results in coding being developed for a

specific research question using a deductive approach to analysing the data (Boyatzis, 1998; Braun & Clarke, 2006; Wildemuth, 2009).

These initial codes were further analysed and refined to identify twenty-one concepts from which three main themes and ten sub-themes were created (Braun & Clarke, 2006; Matthews & Ross, 2010). Once the initial key themes were identified it was necessary to return to the data to compare the themes and look for relationships across the data gathered from the interviews (Gibbs, 2008; Matthews & Ross, 2010). Throughout the process of developing themes and codes to interpret the data it was essential to frequently refer back to the raw data to ensure accuracy of interpretation (Beck & Manuel, 2008; Matthews & Ross, 2010).

The literature review and the research question were used to ascertain whether the themes identified were relevant to and answered the research question and thus enabling the development of a theory or theories (Matthews & Ross, 2010).

The next step in the process was to report on the findings of the thematic analysis. The chain of evidence describing and demonstrating the interpretation of the data and the development of the themes to answer the research question will be discussed in the following chapter. (Matthews & Ross, 2010). It is important that relevance and rigour is evident to demonstrate that the research methods and rules have been followed making the findings credible and relevant (Brown, 2006).

Chapter 4

Data analysis

The findings of the semi-structured interviews with the three groups of participants are discussed in this chapter. The findings will be discussed below under the relevant themes and sub-themes.

4.1   Interview structure

Interviews were conducted with three groups of participants in order to capture an indicative range of opinions with regard to the issues affecting and influencing workforce planning in New Zealand University libraries. The first group of participants consisted of representatives of the senior library management staff from seven of the eight university libraries. The eight New Zealand University Librarians were invited to personally participate or nominate a member of their senior management team to participate in an interview and responses were received from seven of the eight University Librarians. A semi structured interview was conducted with each of the participants, either face-to-face or by telephone depending on their geographical location.

The second group of participants consisted of younger qualified library staff (born in 1975 or later) working in one of the university libraries based in Auckland. It was anticipated that there would be a larger group of participants but only four positive responses were received. Three respondents were based at one university, one at the second and none at the third. It can be concluded with some degree of certainty that these are probably the only qualified librarians in this age group in the three institutions. This is of concern but confirms what has been suspected. A semi-structured face-to-face interview was conducted with each participant.
The third group of participants consisted of two senior members of the Human Resources team, one each from two of the Auckland-based universities. The staff were selected because of their knowledge of or interest in workforce planning. A semi-structured, face-to-face interview was conducted with each participant.

4.2   University/Library trends and issues

Participants from all three groups were asked to identify the important issues and trends that are likely to affect universities and libraries over the next five to ten years. The top three issues identified by the participants from all three groups included funding, changes in technology and the skills needed to deal with these new technologies.

4.2.1 Funding

The senior library management participants identified funding as an issue of concern for universities and libraries in the next five to ten years. Participants 1 and 3 talked of the impact of the global economic situation whereas the rest talked more specifically of the impact of government funding, including concerns about the fact that there may be insufficient funding for the higher education sector and that the funding policies may make it difficult to compete with Australia for the recruitment of both staff and students. Concern was also expressed about a possible squeeze on library budgets which could impact on staff recruitment and the acquisition of library resources. It was agreed that the financial impact of the earthquakes on the two universities based in Christchurch also needed to be taken into account.

The issue of funding was also raised by the younger staff participants. Participant 8 talked of the global economic climate and the impact this could have on government funding for the tertiary education sector in New Zealand. Participant 11 felt that universities may be at risk if there are wide ranging budget cuts by the government in the future as this may mean increased pressure to justify the funding they receive. Participant 10 felt that the discrepancy in university funding between New Zealand and Australia will be an issue in terms of resourcing as New Zealand universities are not as well funded as their Australian counterparts.

Not surprisingly, government funding was identified as an issue by both the human resources participants too. Participant 12 stated that it is a complicated issue as some aspects of the funding stimulate growth while others limit growth.

4.2.2 Technological changes

"There will be more online and distance work which will place greater emphasis on effective and efficient information technology services and dependence on mobile devices as people access information on the fly, wherever they are," according to Participant 9. Librarians will need to keep abreast of these technological developments to provide services to meet client needs.

The impact of the advances in technology was highlighted by three of the senior library management participants. Participant 3 spoke of the major impact of advancing and converging technologies on the library as we know it. It was felt that it will be important to take these changes into account as libraries increasingly interact with users in an online environment and that steps will need to be taken to minimise the digital divide amongst users. Participant 1 predicts that cloud computing and the outsourcing of services will be the way of the future as new technologies and systems such as the library management system are updated.

The younger staff participants were also aware of the changing technologies and the impacts these will have on universities and libraries. Participant 8 spoke specifically of the impact of technological developments in areas such as mobile devices and how this could change approaches to teaching and learning.

Participant 10 felt that the technological developments will hasten the move from print resources to digital only. These developments will shape the role of libraries and librarians, as they will need to ensure they have the skills and expertise to respond to client needs in an increasingly virtual library space.

The speed of change in technology was also highlighted by the human resources participants. Participant 12 pointed out that methods of delivery and learning spaces will need to change to keep pace with technology, for both on and off campus learning and teaching.

4.2.3 Staff skills

"Universities need to be more twenty-first century and aware of international trends," said Participant 2. While Participant 3 talked of a major shake-up of scholarly communication and knowledge management over the next five years and the impact that this will have on the skills and knowledge required by staff to lead these changes.

These issues were also raised by the human resources participants, according to Participant 13 it is important to remain relevant in the global arena and participant 12 expanded on this point saying that academic staff need to remain relevant in terms of technical skills otherwise they may struggle to meet the different and ever-increasing expectations of students of the future.

Looking at libraries more specifically participant 1 highlighted the need for workforce planning to identify and plan for the new skills needed by librarians to deal with the changing library landscape in the future.

Participant 4 felt that "highly-skilled, e-savvy staff are key for the future" and that this will require changes to the staff profile, perhaps reducing the percentage of staff requiring a professional library qualification and considering expertise in other areas such as IT or as participant 6 put it there is a necessity to identify the skills needed in a primarily digital world.

Participant 3 spoke of the necessity to broaden the concept of information literacy to include the teaching of multiple literacies. The concept of multiple literacies goes beyond understanding how to find, interpret and use information to include the use,

curation and preservation of data.

Participant 7 pointed out that "ongoing change is an important factor and librarians need to continually look at the relevance of the library within the institution" and if necessary adapt library operations and the ensure that librarians are equipped with the necessary skills to keep abreast of these changes.

These same issues were highlighted by the younger staff participants who noted that there should be a move from the traditional skills needed in a predominantly print world to skills that take the advancing technological skills into account.

Participant 8 felt that libraries and the roles of librarians will be shaped by the ongoing technological developments while participant 11 indicated that strong leadership and management are very important to ensure that these changes are implemented so that the library retains its relevance within the university.

4.2.4 Service models

"The need to be 'small and smart' both within the university sector and the country as a whole" is important for Participant 3 who went on to say that universities need to identify their unique areas of excellence. It was felt that it may be timely for the New Zealand university sector to consider rationalising courses and developing areas of excellence rather than competing with one another. It is important to consider how this will impact on libraries in terms of staff and service provision as well as universities more broadly. This is quite a revolutionary idea and may not necessarily be well received across the country.

Nonetheless services that are relevant and serve the needs of staff and students of the future are important and go hand-in-hand with skill development, as without the necessary skills staff will not be equipped to meet these service needs. Participant 7 pointed out that "there will be a shift in services and that universities need to keep a finger on the pulse and attempt to plan for the unknown."

Participant 8 felt that while teaching will continue to be important for universities of the future there will be less emphasis on this area and an increased emphasis on research. For participant 11 the evaluation and accreditation of services will be important as a means of quality control within the university sector.

One of the major changes will be the increasing move to online services across the university environment and in libraries. Participant 4 expressed concern about the implication of the large capital costs involved in purchasing new systems to meet this drive for e-learning and digital and online services may be prohibitive.

Participant 6 noted that it is important to identify and develop the linkages between the physical and digital world. Participant 7 commented that librarians need to adapt from traditional librarianship to working in the virtual environment to meet these demands. At the same time it was noted that the physical environment needs to change to meet student demands for study space, wireless methods of communication and social networking. Participant 2 stated that "libraries should move away from their 'stitched upness' and avoid the silo mentality to work more closely with other areas such as student services and IT to provide a seamless customer service across the university in both the physical and virtual environment."

These sentiments were echoed by the younger staff participants. Participant 8 felt that libraries as learning spaces will change dramatically, while participant 9 stated that it is essential for libraries keep up with play with regard to service provision. Participant 11 stressed the importance of maintaining good relationships with clients, particularly the academic staff.

4.2.5 Research support

Performance Based Research Funding (PBRF) and the drive to increase research capacity are important issues for universities and this will continue to be the case in

the next five to ten years in line with the Tertiary Education Strategy 2010 – 2015 (Ministry of Education, 2010). The importance of the need to develop and support the research capabilities of the university was discussed by participants 4 and 7 while participant 3 identified the need for the development of digital data curation skills to enable library staff to provide assistance with the curation of research data. Libraries should be prepared to meet the growing need for research resources which, in light of possible budget restrictions, may be at the expense of resources for teaching.

These issues were re-iterated by the younger staff participants. Participant 9 mentioned that universities need to maintain their research capability and international standing to secure funding and keep good staff. Participant 10 expanded on this by saying that as information becomes more freely available libraries will need to keep ahead of the trend by providing access to relevant information and also taking on a role in managing the storage of and access to research data. It is also important to make online information accessible to enable researchers to collaborate globally.

4.2.6 Diversity

Participant 6 identified the need for universities to move away from conservatism and take cognisance of the changing demographics of New Zealand which is reflected in the diversity of the client base, this according to participant 7 includes the need to cater for older and younger students as well as students from diverse ethnic and cultural backgrounds. Participant 12 felt that the staff profile should match the increasingly diverse student profile. However, it is not always easy to attract suitably qualified candidates to meet these needs. As was discussed in the literature review libraries are dealing with an ageing profession and furthermore as mentioned by participant 7 librarianship is a feminised profession which impacts on the issue of diversity. In my experience recruiting qualified library staff from a diverse range of ethnic and cultural backgrounds, particularly Maori and Pasifika, is difficult.

4.2.7 Recruitment of staff and students

In the university environment the recruitment of talented students is just as important as the recruitment of talented staff. Participants 2 and 7 discussed the issue of increased competition from overseas for the recruitment and retention of international students. Participant 6 stated that there is a need for universities to stay tied and close to the needs of their client groups while participant 5 felt that universities are not meeting the expectations of all those wanting a tertiary education.

It is important that universities retain their relevance to attract good undergraduate students. This means that courses must equip students with the skills to meet the needs of and be relevant to the professions they will be employed in according to the younger staff participants 10 and 11.

The human resources participants both mentioned concerns with regard the increased mobility of students and the aggressive global market that is encouraging many of the best and brightest students to study overseas and the fact that their talent and potential may be permanently lost to New Zealand.

4.3   Workforce planning

In discussion with the two Human Resources participants it was established that neither institution has a formal workforce plan in place, however participant 13 indicated that their institution was moving in that direction, while participant 12 said that workforce planning is included in the university's strategic and business plans which indicates an awareness of the importance of workforce planning. The issue of workforce planning for academic staff has been brought to the fore in New Zealand universities with the recent BERL report on Academic Workforce Planning commissioned by Universities New Zealand. This report has highlighted similar issues to those affecting workforce planning in university libraries such as the

ageing workforce, competition in the global labour market and being an employer of choice (Business and Economic Research (BERL), 2010).

With regard to academic staff participant 13 felt that "there is need to be more innovative around recruitment and creating attractive positions that will encourage the new PhDs to enter the profession." One option may be to change staff perceptions and move away from the traditional models of predominantly employing people in full-time roles. It may be preferable to have a leading professional in a part-time role than not benefit from their knowledge and expertise at all and with the advances in technology this can be more easily facilitated than was possible previously.

Participant 13 also discussed the necessity of including succession planning as part of the workforce plan as it is important to think about where future leadership is going to come from and how these positions are going to be filled once older staff leave. On the topic of succession planning concern was expressed about the number of PhDs that graduate in New Zealand and then move overseas to gain experience and the fact that their expertise will be lost if they do not return to New Zealand. Participant 13 was also concerned that the Performance Based Research Funding (PBRF) process may be forcing universities to retain older staff for longer to capture their research outputs. "This has caused pent up exits which reduces opportunities for younger academics to move into these roles."

The responses from the senior library staff re-iterated that fact that there is an awareness of the need for a workforce plan but none of the libraries has a formal plan in place. This may, in part, be attributed to the absence of a formal university policy, as indicted by the two human resources staff interviewed.

Three of the senior library staff indicated that their library had recently been through an extensive organisational change process. For all three institutions this was a process of rationalisation to streamline and improve service provision to

meet future needs. Participant 6 said they intend to develop a workforce plan to keep the library moving forward beyond the change process.

Participant 4 said that staffing issues are dealt with as they arise while participant 7 was more specific saying that they review positions when there are vacancies and also review whole management areas from time to time. They also do succession planning and second staff to higher positions when the opportunity arises.

4.3.1   Ageing workforce

Age range	20 - 29	30 -39	40 - 49	50 & over
Percentage	12.6%	21.6%	26.7%	39.1%

Table 1 University libraries workforce age demographic

The New Zealand Privacy Act (1993) made it difficult to obtain demographic age data from all the universities who participated in this research so the figures above are an indicative guide only. The CONZUL (Council of New Zealand University Librarians) statistics indicate that New Zealand university libraries employed 850 FTE staff in 2010 while the figures in the table above were calculated over a total of 497.6 staff. It should be noted that these estimations indicate that the figures are slightly lower than those reported for Australia and Canada in the literature review above.

The human resources participants acknowledged that the ageing workforce will be an issue for universities in the future. Participant 12 observed that many academic and allied staff are working beyond the age of sixty-five and that there is a strong likelihood of this continuing and probably increasing in the future. This was echoed by participant 13 who pointed out that "it cannot be assumed that the baby boomers will all be retiring soon."

Thus consideration needs to be given to accommodating the needs of these older workers, this may include adapting traditional models of employment and offering part-time employment options, different roles that continue to utilize their skills and opportunities for phased retirement. At the same time it is important to make room for the younger staff who will ultimately replace them, to work alongside them to facilitate knowledge transfer opportunities that will ensure a smooth transition when the older workers do exit the workforce.

The senior library staff participants discussed issues around internal resourcing with particular reference to longer serving staff. There was concern about the difficulties of encouraging staff who have not kept up-to-date with changes and are not prepared to move out of their comfort zone to update their skills or exit the profession. Managers need to be more proactive in ensuring that this happens as in many cases they are blocking the career aspirations of younger staff. The two participants from Christchurch pointed out that the financial uncertainty as a result of the earthquakes has impacted on the retirement intentions of some staff being delayed.

On the other hand at least three of the participants acknowledged that some of their most valuable and productive staff are older, long serving staff members and like the HR participants stressed the importance of ensuring that their knowledge and expertise is retained and ultimately successfully transferred through succession planning.

Participant 7 mentioned the need to provide a phased retirement scheme which is not available at that institution. Presently the only option is to re-employ retirees on part-time fixed term contracts in roles where they are able to lead specific projects or provide mentorship to younger staff; interestingly this was also mentioned by an HR participant.

Currency of skills was considered very important by both the younger and the senior library staff participants and it was emphasised that a number of the older

staff have kept their skills current and are still making a valuable contribution. It is important that there is clear leadership in the area of professional development as this has an impact on ensuring the currency of staff skills according to participant 2.

4.3.2 Recruitment

The importance of being able to compete in the global market to attract the best staff was emphasized by both the human resources participants. However, it is equally important to retain our best and brightest staff in New Zealand and participant 13 expressed concern about them going overseas to work and/or study and the difficulty of providing attractive opportunities to entice them to return.

Participant 12 expressed the opinion that universities worldwide are generally good employers with similar terms and conditions of employment. Thus it is important to identify an attractive point of difference that will entice staff to New Zealand from other parts or the world. Universities have tended to rely on the attractions of the New Zealand lifestyle but participant 12 feels that perhaps the emphasis should be on the career opportunities available to attract world class staff. The human resources participants were talking mainly about academic staff but these issues also apply to the recruitment of staff to library positions. To attract good staff universities need to maintain their reputation and competitiveness with other universities both nationally and internationally according to participant 8.

Looking more specifically at libraries participant 2 said that with the increasing pressure on budgets including the recruitment budget, "libraries need to grasp marketing opportunities and be more proactive in recruiting skilled staff." Participant 4 commented on the difficulty of recruiting skilled staff particularly in areas such as collection development, while participant 5 expressed concern about the number of experienced staff going overseas, mainly to Australia because of the attractive salary packages which include generous superannuation benefits. Interestingly, this was the only reference to library staff going overseas, most other participants showed more concern about staff not being prepared to move around.

This is contrary to the concerns expressed about academic staff and the trend in New Zealand more widely where there is constant concern about the 'brain drain' to Australia particularly.

With regard to recruitment the senior library participants were asked to give an indication of the average number of applicants received for professional library vacancies. Surprisingly there seem to be between six and ten applicants in all areas, however it was emphasised that not all the applicants necessarily meet the minimum criteria. It is encouraging that there is a small pool of suitably qualified applicants however it should be borne in mind that these may not be the most talented staff.

Significantly, participant 6 mentioned that the number of applicants had increased since their change process and that there had been an increase in the number of younger staff recruited to management positions. Interestingly, one of the other senior library staff participants mentioned having recently lost some staff to this particular institution.

4.3.3   Recruitment to the profession

"An inspiring and supportive manager/mentor who helped me see that librarianship was an exciting profession" was what inspired Participant 9 to qualify as a librarian. More managers of this ilk are needed to inspire younger people to move into the profession.

In terms of recruitment the four younger staff participants discussed what had attracted them to the library profession and more specifically a university library. It is useful to note that all four have an undergraduate degree and a Master of Library and Information Science which is generally the preferred option in a university library. Ideally subject or liaison librarians should hold a degree in their area of subject specialization but this is not always the case. The participants interviewed hold an interesting range of undergraduate degrees including planning, criminology

and psychology, statistics and Latin, Greek and ancient history, none of which is the area they now support as a subject librarian.

Three of the four participants stated that an enjoyment of the research process, finding information and helping others find information had encouraged them to seek a job in a university library. Participant 8 expanded on this by saying that fostering research skills in others was also an important motivator. The fourth participant spoke more extensively about the considered decision to move from a role in the private sector to a library position and that working in a library while studying for a professional library qualification had been important in confirming that this had been the right career choice.

Regularly using and becoming familiar with their university library while studying for their undergraduate degree was a motivating factor for three of the four participants when making the decision to work in a university library while for the fourth participant it was not a deliberate move from a public library but a case of securing a job in a university library while on an overseas working holiday and really enjoying the experience.

The specialist nature of the work, the stimulating environment, the excellent resources available and the opportunity to help students find information made the university environment more attractive than public libraries for these participants. Participant 11 particularly talked of the importance of the working environment without the pressure, stress and tight deadlines experienced in a previous role in the private sector.

4.3.4 Library Qualification

Professional staff in university libraries are required to hold a tertiary library qualification however concern is been expressed about the relevance and value of these qualifications. There are presently two tertiary providers offering a professional library qualification in New Zealand, one at postgraduate level and the

other at undergraduate level. Not only is there concern about the currency of the qualifications but as the skills required in libraries change there is debate about whether the degree should change to meet these needs or whether libraries should be rethinking the need for all professional staff to hold a library qualification. These issues are not unique to New Zealand but are discussed in the literature in other parts of the world too.

Amongst the senior library staff participants concerns were expressed about the professional library qualifications in New Zealand. Participants 3, 6 and 7 were particularly concerned while the other participants alluded to the issue. It was felt that the educators do not really understand the increasingly complex library environment and the needs of academic libraries, particularly in the areas of information technology and data management. According to participant 3 the programmes need to be broader especially in the digital environment and scholarly communications areas. There was also concern that new graduates are not adequately equipped for the jobs they are applying for. This is perhaps an argument for considering the development of cadet training positions and mentoring programmes to prepare new graduates for their careers.

It was also acknowledged that libraries need to be looking more broadly for specialist skills in areas such as business, marketing, web development and computer science.

The four younger staff participants hold a postgraduate qualification and all felt that it equipped them reasonably well for a job in a university library. Participants 10 and 11 felt that having studied at postgraduate level and undertaken a research project provided them with an understanding of the research process which has been helpful when working with academic staff and postgraduate students.
All four participants commented that the wide range of topics covered enabled them to gain a broad understanding of the library and information environment. However there was some concern that the programme was rather too theory-

based and did not equip them with many practical skills so working in a library while studying was very useful.

It is important to note that three of the four participants have been qualified for at least five years which may impact on the extent to which they feel that the qualification prepared them for the working world as there have been some fairly dramatic changes in libraries over the last five years.

4.3.5 Barriers to recruiting staff

When discussing some of the barriers to attracting staff to jobs in university libraries three of the senior library staff participants spoke of the competition from other sectors such as information management, special and public libraries, particularly with regard to attracting new graduates. However the technology skills that staff develop working in library roles nowadays also opens up a wider range of opportunities particularly in the corporate sector and outside of libraries for more experienced librarians. Participant 4 felt that new graduates are often more aware of public libraries and the opportunities they offer. Participants 3 and 7 pointed out that this may be a "branding issue and that universities need to do a harder sell to attract younger librarians."

There is still a perception that it is not a very 'sexy' job and there is also a lack of awareness of the career development opportunities available in university libraries. However participant 3 felt that these perceptions may have diminished over the last ten years. Five of the seven senior library staff participants also felt that low salaries may be a barrier to recruiting staff but most acknowledged that it is not necessarily a major barrier.

Participant 7 felt that prospective recruits are not always made aware of the range of career development opportunities available in university libraries compared with public libraries. These opportunities include lateral development opportunities such as project management as well as upward progression into management roles. It

was also stated that interesting jobs that are varied and challenging are important and that the top level jobs should be clearly defined to attract mid-career librarians to leadership roles. Participant 5 expressed concern about the fact that some staff seem to be reluctant to plot a career path and so are more likely to feel frustrated and move out of the profession. Participants 2, 6 and 7 talked of the need to recruit outside of New Zealand particularly for specialist skills in certain subject areas as well as leadership and management skills.

4.3.6   Employer of choice

There was some uncertainty amongst the senior staff about what being an employer of choice really meant for libraries but participants 1 and 6 acknowledged that aiming to be an employer of choice should be articulated in the workforce plan. Four senior staff participants felt that offering staff a clearly defined career pathway supported by development opportunities was an important aspect. This included encouraging and financially supporting library assistants to gain a professional library qualification as well as providing opportunities for qualified staff to develop a broad range of skills that extend beyond a professional library qualification such as teaching, negotiating and marketing skills.

Offering positions to new graduates is not always possible according to participant 7 due to the lack of movement of older staff but that the library should endeavour to offer development opportunities such as secondments, project work, cross-library work and basic management experience to their own new graduates. Due to budget constraints participant 2 said their library is only able to recruit to vacancies and is not able to create positions for new graduates that offer experience across a range of areas.

Participant 3 said in an attempt to be an employer of choice their library pitches itself as "an incubator for talent and provides opportunities for new graduates to build their careers with mentorship and coaching from more experienced staff members." They accept that being a small institution with limited promotion

opportunities people will move on but there is the possibility that they may later return to a management position within the institution.

Being an employer of choice for people at different stages in their career if they display aptitude and potential as well as the necessary level of experience was deemed important for participants 4 and 6.

The location of the institution also has a role to play in being an employer of choice and it was agreed that the larger centres, particularly Auckland, are more attractive than the smaller centres such as Dunedin and Palmerston North whereas in Wellington there is far greater competition from the numerous libraries based there. The libraries based in Christchurch both acknowledged that as a result of the earthquake it is not very easy to attract applicants, particularly from outside of Christchurch.

4.3.7   Retention

It is important that once talented employees have been recruited they should become fully engaged and productive. It is also important that they are retained as a high staff turnover can be very costly to the organisation (Armstrong, 2011).

All seven senior library staff participants were in agreement that staff retention is not a problem with regard to professional staff in their library. In fact there was greater concern about staff staying a long time particularly when they are not fully engaged and have not kept abreast of changes. Where this is the case remedial action is required to ensure changes are made. However participant 3 felt that this may change as the number of younger staff grows as they tend not to stay as long as the older cohort, particularly when they are not offered interesting and challenging work. However, participant 6 noted that the 'stayers' are from a range of age groups and are not all older staff.

There were a number of reasons given as to why staff tend to remain in their jobs for a long time. Five of the seven senior library staff participants cited the fact that staff enjoy working in universities because they are good employers that are work/family oriented and provide opportunities to work in a stimulating environment. Participant 7 expanded on this by pointing out that the library is particularly good at accommodating family needs, probably due to the higher proportion of female managers. Some of the other benefits of working in university libraries include good professional development opportunities, generous annual leave provisions and the lack of a need for an expensive corporate wardrobe which would apply to librarians working in special libraries in the corporate world.

Most participants also felt that there was some resistance to change amongst librarians and that they are not always keen to move away from the town or city in which they are based. Some of the reasons mentioned with regard to this reluctance to move included family ties such as a partner's job, ageing parents or childcare arrangements also ageing staff are less likely to want to move. It was also felt that the lack of other job opportunities within the city or across New Zealand made moving around less likely.

4.3.8 Performance management

Effective performance management is essential for all staff and provides opportunities to recognise and reward staff who have met or exceeded expectations. As participant 2 noted it is important that leaders actively reward and encourage good performance. Where goals have not been met remedial action should be taken and progress monitored.

The senior library staff participants all agreed that it is important, particularly for longer serving staff members that skills are kept current. Participants 2, 3, 4 and 7 agreed that when staff fail to engage in remedial activities, such as training and development opportunities, to update their skills a formal process should be undertaken to encourage them to move on or retire.

Six of the seven senior staff participants said there was a formal performance and development review system in place in their institution. This process includes a formal review usually on an annual basis and regular individual meetings with managers during the course of the year. Participants 5, 6 and 7 mentioned that the university also has performance management tools in place to manage disciplinary and exit processes but that this can be a lengthy and difficult process. Participant 5 highlighted the importance of managers following the correct process and documenting evidence of poor performance. A supportive HR team is very important when dealing with difficult performance management issues according to participants 3 and 7.

There was agreement that in most cases performance reviews were well managed. However the references above with regard to people staying too long and not keeping their skills up to date suggests that this is in fact not the case. Participant 5 felt that "managers don't always follow correct processes and document evidence and incidents" and take the appropriate action.

4.3.9 Turnover

In light of the issues discussed above with regard to the ageing workforce, performance management and retention it is not surprising that turnover is low in New Zealand universities.

The human resources participants stated that turnover in both institutions is low in comparison with the private sector. Participant 13 said that turnover statistics are not formally reported at their institution but the average tenure of staff is ten years which would imply a low turnover rate. At participant 12's institution the turnover rate is approximately 4% for academic staff and 6% for allied or general staff. This is well below the figure of 15% which is considered acceptable in general management and administrative roles in the public sector. Participant 12 felt that these statistics are reflective of the nature of the working environment in

universities, the higher participation rate for women and the availability of flexible work options. Both participants indicated that the turnover rates in the library were similar to the university-wide rate.

The senior library participants were asked whether exit interviews were conducted when staff leave and if so how the data were used. The majority said that exit interviews were conducted either by the library or HR. In most cases HR compiled a report for senior library management and in general it is used to identify trends and develop remedial policies and plans. It was also acknowledged that the data are not always useful and that they should be treated with a degree of caution and sensitivity.

4.3.10   Training and development

The availability of training and development opportunities that meet the skill development and career progression needs of staff are an important aspect of retention and talent management. Six of the seven participating universities have a contestable staff development fund and the other one has an individual staff development allowance available for training and development needs that are identified and agreed in a staff development plan.

Participant 6 pointed out the importance of taking a strategic approach to training and development and ensuring that the library has a staff development strategy and plan that is well articulated to employees. Participant 7 mentioned the importance of linking training and development opportunities to the library priorities while participants 2 and 4 felt that training opportunities and needs should be identified as part of the performance review process.

All seven senior library staff participants felt that the training and development opportunities available in their institutions were very good and provided a suitable range of options to enable staff to keep their skills current. Most universities offer a variety of in-house options including workshops and seminars, some of which are

offered by the university training and development unit and others within the library. Staff are also able to attend conferences, workshops, seminars and courses within New Zealand and further afield as appropriate. For some institutions conference attendance is only funded for staff members presenting papers. Staff are also strongly encouraged and supported to complete a library qualification which is still essential for most professional positions. With all these opportunities available the question has to be asked as to why there have been comments about the number of staff who have not kept their skills up to date.

It is concerning for me that only two participants mentioned the availability of coaching and mentoring opportunities but this may be due to the fact that there are no formal mentoring and coaching opportunities rather that it happens on an informal basis instead. I feel that this is an area that university libraries need to pay more attention to in order to prepare staff to take on leadership roles. The need for formal mentorship and support was cited as important by the four younger staff participants.

The two HR participants indicated that their institutions have formal staff development policies for both allied and academic staff and provide good support for professional development. This concurs with the opinions of the senior library participants with regard to staff development opportunities for library staff.

However one area that may need to be addressed is the assertion by the HR participants that there is greater emphasis on career progression for academic staff than there is for allied or general staff. As the library staff fall under the allied or general staff policy in both institutions this is an area that may require consideration in any future workforce planning.

4.3.11   Career development

"There are not enough opportunities to manage small teams to gain confidence and skills," "it is quite difficult to move into a management role as there are not

many middle management roles" and "people stay in the good jobs for ages" were three telling comments from the younger staff participants when asked about their career aspirations.

Three of the four younger participants plan to continue working in libraries for a least the next five years, the fourth participant is unsure at this stage and is presently studying for a diploma in another field which will open up alternative opportunities. Two of the four participants intend to move into a management position in the future while the other two felt it may be possible in the future but neither is very keen in the short term.

For participant 8 moving into a leadership role seemed like a natural progression and the prospect of being involved in decision-making and contributing to the strategic direction of the library is very attractive. Participant 10 expressed concerns about the people management side of a leadership role and the perception that these roles involve long hours of work, however at the same time acknowledged there was less resistance to the idea than previously. Participant 11 has had some supervisory experience and did not particularly enjoy managing people. At present the prospect of working with academics on research projects is more appealing, however the possibility of moving into a leadership role in future has not been ruled out.

The fact that all four participants expressed an interest in at least considering a leadership position in the future helps allay concerns about future leadership potential within the profession. All four are ideally suited to a leadership role whether or not it is connected to a people management role. The concern however is that there appears to be a very small group of younger people entering the profession.

Three of the four participants in this group identified the need for support from the university and library management to progress their career by means of professional development opportunities. Leadership and management

opportunities such as leadership courses, practical experience, project management and a mentoring programme were also identified as important for career progression.

However all four participants saw barriers that may delay or even halt their career aspirations being achieved. Not surprisingly, three of the four participants cited the slow turnover rate amongst staff in leadership roles as a frustrating barrier to their career progression. Participant 9 would ideally like to be in a management role within the next 5 years but is not sure that suitable opportunities will arise to make this happen. Participants 8 and 10 acknowledge that they will probably need to move either within New Zealand or further afield to achieve their career goals but participant 8 stated that personal circumstances may make this difficult. Participant 9 prefers working in a university library role but acknowledges that moving into a knowledge management role would probably allow a more rapid career progression. Participant 11 expressed concern that factors such as the economic recession, budget and staff cuts may reduce the availability of career progression opportunities. It is important that library managers reassure good staff that this will, as far as possible, not be that case as it is important that they are not lost to the organisation and the profession.

4.3.12   Motivation to stay

Interesting challenges and opportunities are important motivators for all the younger staff participants and these include opportunities for growth and development, the ability to make a difference, not having to manage people and changes to the job description to provide challenges. Anticipation of future developments in the library and its increasing value to the university community are also motivators for participants 8 and 9.

However two of the four participants have or are considering other career options. Participant 9 has considered moving into knowledge or information management, a law library or a role in statistics but would really prefer to remain in a university

library. Participant 10 is presently studying with the intention of moving into a career in a different field.

Participant 8 is very satisfied and has no intention of moving into another career while participant 11 made a considered career move into libraries some years ago and has no intention of moving at this stage.

4.3.13 Leadership and management

The senior library staff participants were divided over whether there is a problem attracting staff to leadership and management positions, three felt there is a problem, three felt it is not a problem and one was unsure as they had not recently advertised any positions to test the market. This is obviously an area of tension in university libraries that requires further investigation as attracting future leaders is an area of concern. The comment above from the younger participants about "not having to manage people" highlights this.

There was agreement that succession planning is important to identify leadership potential in one's own staff and provide growth and development opportunities to equip them to move into leadership positions. Participants 4 and 6 spoke of older staff causing blockages and this, according to participant 5 is preventing younger staff from seeing a career path into a leadership position in the future. This echoes the concerns expressed by the younger staff participants when discussing their career aspirations. Participant 4 feels it is important to provide opportunities for a range of leadership experiences, including project management and secondments, to compensate for the fact that flatter structures can limit the number of promotion opportunities for staff. Mentoring programmes play an important role in supporting the growth of talent within the institution according to participants 3 and 5. One option discussed previously by participant 7 is that of offering older staff the option of returning in part-time, fixed-term positions after retirement to work alongside and mentor younger staff in management roles.

There have been some positive outcomes, the senior library staff participant at one of the larger institutions noted that internal applications from younger staff for leadership positions had been successful. As a result of an organisational change process the participant from another institution noted that their senior management team is all in their thirties and forties. Participants 1 and 4 felt that some younger staff are reluctant to take on management positions due to the extra responsibilities that these positions entail which corresponds with the responses from two of the younger staff participants. It is interesting to note these organizational differences - two institutions are providing opportunities for younger staff, while the managers of the latter two libraries consider how they may remedy this issue.

With regard to recruiting to leadership and management positions all participants agreed that it is imperative to attract people with the right skills and experience to take on management roles at all levels from first level managers to senior management. One of the concerns in this regard is that the library profession is not very good at developing leaders and that staff are not always aware of their own abilities and thus reluctant to put themselves forward for leadership positions according to participant 7. Participant 10 felt that this may be attributed to the fact that "the personality type of most librarians, who want to help people, does not necessarily translate into making good managers."

Participant 6 felt that it is important to find people who are self-aware and confident enough to deal with the different contexts required in a leadership position and that they are able to serve the organization rather than their own agendas. It was felt that they also need to be proactive in developing relationships and speaking up when appropriate.

Participant 3 argues that "there is a real lack of leadership skills not just in libraries but in universities generally both in New Zealand and Australia." The senior library participants agreed that despite identifying the need for succession planning to grow talent within the institution there is not a great depth of leadership talent in New Zealand and that it was necessary to recruit further afield particularly for

senior leadership positions. This is borne out by the fact that five of the eight university librarians have either been recruited from overseas or are returning New Zealanders who have held leadership positions overseas in recent years and this is true of a number of middle management positions too.

There was a range of opinions on how to address the leadership training and development needs within libraries. There was some consensus that university-wide leadership opportunities are beneficial for breaking down the silos and providing an understanding of the broader university context, building networks and offering opportunities to interact with staff across the university.

There was also some support for university libraries in New Zealand to collectively provide leadership courses while others felt that the sector was not big enough to sustain this. The point was made that even the broader New Zealand library sector was not big enough to do this successfully. The competition across the sector for staff with leadership potential could also be a barrier to the success of such a venture. It was felt that sending staff to the Aurora Foundation Leadership Institute programme in Australia that caters for the Australia/New Zealand library sector was a preferable option as it provides a greater opportunity for developing useful networks and ongoing mentoring opportunities. However it is an expensive programme which makes it prohibitive for some institutions.

4.4   Summary

There was general consensus among the three groups of participants about the trends and issues affecting the university and university libraries more specifically. It was beneficial having the broader university perspective from the human resource participants to put the library trends and issues into perspective.

The trends and issues identified included the changes in technology which will impact on staff skills and library service models as well as support for researchers. Recruitment of students and staff and the increasing diversity of both groups were

also discussed. University funding affects all of these issues and also impacts on workforce planning initiatives.

Workforce planning is becoming increasingly important to ensure that universities and university libraries have staff with the appropriate skills and competencies in the future. A number of areas that require attention in this regard were discussed by the participants. The issue of the ageing population working for longer and their impending retirement in the next ten years presents challenges and opportunities for libraries. Recruitment of new staff to libraries and indeed the library profession as well as the relevance of the present professional qualifications were discussed. Some of the barriers to recruitment and the need to become an employer of choice were also highlighted. The retention and turnover of staff were discussed in terms of performance management and motivation which highlighted the fact that there are many 'stayers' in the profession. The importance of the need to provide career development opportunities for staff, particularly in the area of leadership and management development was raised.

While the discussion was predominantly focused on libraries with a broader university-wide perspective from the human resources participants I feel that the workforce issues may be of interest to other professions, particularly in the public sector.

Chapter 5

Discussion

The analysis of the semi-structured interviews revealed a number of interesting findings that will be discussed in this chapter.

5.1   Trends and issues affecting university libraries

It is interesting to note that there was a high degree of consistency between the participants with regard to identifying the trends and issues affecting university libraries of the future. The three groups, namely the library managers, younger librarians and human resource managers, could have been expected to hold some differing views. There was also a strong correlation with the trends and issues identified in the literature review with the exception of some minor regional differences in relation to the financial situation in New Zealand and the impact of the recent earthquakes in Christchurch.

The technological changes affecting libraries and universities were important issues for all the participants and this was echoed in the literature review. The speed of these changes will impact on the delivery of services and resources in an online environment as libraries increasingly move from the physical to the digital world and embrace mobile technologies, social networking tools and cloud computing. We are reminded by the University Leadership Council Report (2011) that university libraries can no longer adopt a 'wait and see' attitude as "the library of the future can and should come to fruition on your watch" (p.5). I feel that this is a reality that can no longer be ignored by New Zealand university libraries if they wish to remain relevant to their users. As was discussed by the participants these changes cannot be achieved without strong, visionary leadership within libraries to ensure that library staff are equipped with the knowledge and skills to deal with these changes.

While it was agreed that there is still a demand for library as place it was acknowledged that there needs to be a change in the way the space is used. The library can no longer function predominantly as a storage facility for print resources but should provide of a variety of learning and study spaces that are flexible, wireless and equipped with the latest technologies. To this end CONZUL (Council of New Zealand University Librarians) is working on a Collaborative Store project for the retention a last copy of low use print journals and eventually books across the New Zealand university sector. This will enable university libraries to reduce the size of their print collections particularly as many of these items are also available electronically. Furthermore library space planning was the topic of a CONZUL focus group held earlier this year where staff from the eight New Zealand university libraries shared ideas and experiences of recent and future initiatives for new and refurbished library spaces.

Increasingly libraries, like the rest of the university, are required to demonstrate their value with regard to student success rates and research impact and this will mean a significant shift from the traditional quantitative measures used in libraries. Counting the number volumes held, the number of visits to the library and items borrowed will become less relevant in the future. Far greater importance will be placed on accountability in areas such as contribution to research initiatives and linkages between student grades and usage of library resources. This is an area that university libraries are grappling with internationally and research on the topic is growing.

The Tertiary Education Strategy 2010 -2015 (Ministry of Education, 2010) identified, as a priority, the need to build research capacity within New Zealand so it is not surprising that it was an issue raised by most of the participants. It was acknowledged that there are a number of challenges facing libraries with regard to extending the range of services offered to researchers in the area of e-research by undertaking roles to support open access publishing initiatives, data management, metadata provision, copyright and intellectual property advice and training in library research skills (Herman & Gioia, 2001; Stokker & Hallam, 2009). The literature

review indicates that libraries in other countries have to a lesser or greater extent begun work in this area but it is an area that requires further investigation and more importantly funding in New Zealand.

Underpinning all the issues and trends mentioned above is the need for ongoing financial support from the university funding agencies. Like the rest of the world the global economic situation has impacted on universities and university libraries. The issue of government funding was a major concern as all New Zealand universities rely predominantly on government funding with additional revenue coming from international students. There was concern that there may be insufficient funding for the higher education sector in the next five to ten years and that this will make it difficult to compete in the global market and more particularly with Australia for the recruitment of talented staff and students. This will also impact on library budgets and affect both staffing and the acquisition of library resources. The cost of subscriptions to online scholarly databases and journals is very topical at present with a number of the top universities, including Harvard, threatening cancellations as publishers continue to increase prices. There is also increasing support for open access initiatives and this is borne out by the call from the UK government to make publically funded research outputs freely available to all who wish to access them.

It can be concluded from the discussion above that the issues and trends facing New Zealand university libraries do not differ to any great extent from the international issues and trends. As discussed in the literature review there is some innovative work being done in other parts of the world that New Zealand university libraries can learn from as they plan for the transition to the library of the future. As a member of the group of New Zealand university library managers who visited a number of university libraries in Singapore and Kuala Lumpur recently it was reassuring to see that they are facing similar issues to those identified in the discussion above.

5.2   Workforce Planning

It was disappointing, but not entirely unexpected to discover that none of the seven universities who participated in the survey has a formal workforce plan in place. However it was encouraging that the senior library staff participants acknowledged the strategic importance of developing such a plan, particularly in light of the changes on the horizon due to the aforementioned trends and issues. Three of the libraries have recently undergone significant organizational changes, in response to the changing landscape. In one of the three universities it was predominantly a downsizing exercise while for the other two it was a rationalisation and redeployment of staff. One of the participants acknowledged that developing a workforce plan would be important to sustain the changes and keep moving forward. I hope that the recent BERL report on workforce planning for academic staff in New Zealand may act as a springboard for a similar initiative for library staff in New Zealand university libraries (Business and Economic Research (BERL), 2010). A number of university libraries in Australia have developed workforce plans over the last few years and the Libraries of the Australian Technology Network (LATN), of which one of the New Zealand university libraries is a member, are encouraging their members to share workforce planning ideas which should provide further impetus. This research project has prompted the researcher's university library to embark on a workforce planning project this year. As discussed in the literature review workforce planning has also been undertaken in other sectors, such as the nursing profession, which are facing similar issues with regard to an ageing workforce.

5.2.1   Ageing workforce

The review of the literature confirms that libraries are not alone in dealing with impact of an ageing workforce but statistics indicate that the library workforce, like nurses and academics, has a larger cohort of older workers than professions in the private sector. Research shows that there is a tendency for these staff to stay in the workforce for longer than previous generations thus it is important to ensure

that their skills are kept current and their needs are catered for in terms of flexible work arrangements and phased retirement options. It has also been shown that many older staff still have a valuable contribution to make in terms of sharing their knowledge and expertise as well as mentoring younger staff.

This presents a number of challenges for managers with regard to workforce and succession planning and ensuring that active steps are taken in terms of recruitment, retention, training and development, promotions and turnover to deal with these changing workforce demographics and replace the ageing workforce as they leave the profession.

It has also been noted that most of the leadership and management positions in libraries are held by older staff members so it is important that there is a succession plan in place to prepare for the transfer of knowledge and continuity of leadership and when these older workers retire (Hedge et al., 2006; McKinnon, 2010).

5.2.2 Recruitment

Contrary to expectations recruitment does not appear to be a major issue for university libraries in New Zealand at present, particularly for the lower level positions. The senior library staff participants reported that at present they receive a reasonable number of adequately qualified applicants from a range of age groups for the entry level positions that do occur. However it was noted that recruiting to specialist and senior positions was an issue and that it was often necessary to go outside of New Zealand to obtain these skills, as has been the case for university librarians and other senior library managers.

It was noted that older workers are choosing to remain in the workforce for longer with many remaining beyond the age of sixty-five, in fact at least three of the senior library staff participants mentioned that they have staff members in their seventies. It was also noted that turnover rates are relatively low and this was attributed to the

fact that universities are generally good employers and offer attractive staff benefits. Indications are that recruitment will become increasingly challenging in the next ten to fifteen years as older workers begin to retire in large numbers and there is a much smaller cohort of younger librarians in the profession to fill the gaps. The time is right to begin planning to ensure that not only are new librarians recruited to the profession but that there are staff available to fill leadership and management vacancies as they occur. At the same time the fact the libraries are on the brink of significant technological changes means that staff will also require some very different skill sets in the future.

Research indicates that the younger generations are smaller in population size than the ageing workforce and this will present further recruitment challenges in terms of replacing staff. There are also far more career options available for these people and this includes those with a library qualification. The job market is far more competitive within New Zealand and globally and will become more so as the number of vacancies increase across the board as the ageing workers retire.

To this end libraries need to consider how to market the profession and developing an employer brand is an important first step if they are going to attract staff in a competitive global market. Developing a successful employer brand will contribute to the organisation gaining a reputation as an employer of choice to recruit and retain talented, highly-skilled staff. Being an employer of choice has not really been a priority for libraries until now but it is an area that deserves consideration as they seek to recruit for new workforce skills and expertise in the future. However within the library profession being an employer of choice needs to be extended beyond recruiting to vacancies in an organisation. There is a real need to remove the negative perceptions of the job in order to attract talented people to the profession and this is dependent on having leaders that are proactive in developing an employer brand and workplace culture that promotes the profession as an employer of choice. Becoming an employer of choice and attracting flexible, adaptable, highly skilled people to the profession is a real priority if libraries are going to meet the needs of their users in the future.

5.2.3 Retention

The participants concurred with the evidence in the literature review that retention has traditionally not been a problem within the library profession. In fact the senior staff participants agreed that staff staying too long was a greater problem particularly if they are not meeting the expected levels of performance. The reasons cited for the low turnover rate included the availability of family-friendly policies, a stimulating work environment, good professional development opportunities and generous leave allowances offered by most universities. It was also felt that in many cases staff were resistant to change and reluctant to move to other locations even for promotion opportunities and this is often affected by family commitments.

These 'stayers' who are comfortable in their jobs and have not kept their skills current, despite the opportunities available to do so, present challenges as many are reluctant to adapt to the changes required. It is important that these staff are actively encouraged to undertake relevant training and development opportunities to update their skills. A robust performance management process is essential to monitor progress and if necessary performance manage non-performers out of their roles. As one senior library participant pointed out this is reliant on strong leaders who are prepared to follow the appropriate procedures to ensure that this happens.

Performance management and appraisal has been shown to be an area that requires greater attention from managers now and in the future to ensure that those staff who remain with the organisation are fully engaged and meeting their agreed performance goals and the required productivity levels.

It is anticipated that these low turnover rates may change in future as there is a perception that younger staff are less likely to be bound by the same loyalty to an employer, particularly when their career aspirations are being blocked by these

'stayers'. The younger participants demonstrated this by stating that they are more likely to move on in pursuit of interesting and challenging work if their expectations are not met. Thus retention policies are likely to become more important in the future.

It should be acknowledged that low turnover rates are not necessarily a negative factor provided that the staff are continually challenged, remain productive and keep their skills up-to-date. Retention of talented staff who are fully engaged and equipped with the skills and knowledge to make a valuable contribution to the organisation should be the focus in the future. To achieve this it is important to ensure that the job is interesting and challenging and that staff are able to see a career pathway supported by the necessary training and development opportunities. Work/life balance and flexible work options have also been shown to be important for retention and engagement.

5.2.4 Leadership and management development

Leadership capability is already important for business success and will become even more so in the future (Wright, 2010). As Wright (2010) goes on to point out leadership is about people and harnessing their potential for the success of the organisation. Leadership needs to be an organisation-wide capability. This was echoed by one of the senior staff participants who pointed out that there are leadership opportunities across the whole organisation and not just in the top management positions.

Other participants felt that there is a lack of leadership potential and talent in New Zealand, affecting all professions not just librarians. Alongside this studies have shown that younger librarians are generally not keen to move into senior management roles and this raises concern about who will replace the current library leaders when they retire.

In light of this it was interesting to note that only two of the four younger staff participants showed an interest in moving into a leadership role in the near future. However the slow turnover rate amongst staff in leadership roles was also cited as a barrier to achieving this goal. They both felt that this may necessitate moving to a new position either within New Zealand or further afield to achieve their career goals. Managers need to pay heed to such concerns and take steps to accommodate these needs and encourage these valuable staff to remain in the profession.

These observations and the discussion above with regard to leadership capability alongside the transformation of libraries leads me to the conclusion that libraries need to be rethinking leadership roles and considering a far more collaborative, shared leadership model that distributes innovation and leadership responsibility more widely across the organisation. This model seems to be more suited to future leaders as the younger staff participants displayed some reluctance to taking on leadership roles as they are perceived to involve longer hours of work and burdensome people management responsibilities. It also opens up opportunities for greater teamwork, shared problem-solving and creativity.

5.2.5 Remuneration

Although remuneration has not been a major concern within the library profession to date it is predicted that this may change as competitive remuneration is seen to be more of a concern for the younger generation librarians (Lewis, 2010; Sayers, 2007) and this was confirmed by the younger staff participants interviewed.

As long as New Zealand universities operate under the present government funding model as discussed in the literature review there is no real prospect of a significant increase in staff remuneration. However in the light of the concerns about attracting people into the library profession and the fact that some library jobs will require people with different skill sets this may need to change in the future. The variety of jobs available to these people and the fact that they have the

potential to earn higher salaries elsewhere may mean that university libraries will need to reconsider remuneration packages or alternatively rationalising staff numbers. Working more collaboratively with other institutions to share the services of staff with specialist skills may be a more extreme consideration but it should not be discounted.

5.3 Conclusion

Interestingly LIANZA (Library and Information Association of New Zealand Aotearoa) has just recently (July 2012) called for expressions of interest for working groups for three strands, namely 'Brand libraries,' 'Future skills' and 'Emerging leaders' of a Strengthening the Profession Project. These working groups will be looking at some of the issues raised by the interview participants and while the project is aimed at the broad spectrum of libraries there is bound to be some relevance for university libraries more specifically.

Chapter 6

Limitations and opportunities for further research

The research revealed some interesting findings with regard to the issues and trends affecting workforce planning in New Zealand university libraries. However there are some aspects that could be addressed in greater depth in future research. These are limitations that lie beyond the scope of this research due to the constraints discussed below.

6.1   Data limitations

Due to time constraints and the scope of this research the interview sample was restricted to an indicative sample consisting of a group of senior managers, a group of younger qualified librarians based in Auckland and two human resources managers, also based in Auckland. The response rate from the younger staff group was particularly disappointing as the views of this group are important with regard to the future of libraries.

It would be useful in future research to include participants across a broader age range and geographical location to gain a clearer understanding of the workforce planning issues. Of particular interest would be those who enter the profession later in their careers to gain an understanding of what attracted them to the profession and what their career aspirations are as they are likely to fill the leadership gaps as older workers retire. Their input would be useful to inform future recruitment policies with regard to becoming an employer of choice and attracting mature and younger staff.

The semi-structured interviews were held face-to-face with the participants based in Auckland and by telephone with those based outside of Auckland. It is

recognized that this may present some bias to the findings however the researcher did not find any significant difference in the findings from the two data collection methods, particularly as the participants residing outside of Auckland were known to the researcher.

6.2   Demographics

Due to privacy issues and the constraints of time it was very difficult to gain accurate age demographic for library staff thus the figures quoted in this paper is at best a rough estimate of the age ranges of staff which makes it difficult to accurately predict trends such as potential retirements. It would be very helpful to obtain accurate statistics for the New Zealand university library workforce to inform workforce and succession planning initiatives.

A collaborative workforce planning project similar to that undertaken for the academic staff in New Zealand universities may help solve these issues. It would be valuable to gain an understanding not only the age demographics but the retirement intentions of older staff and the career aspirations of younger staff. It would also be useful to understand the skills gaps as well as training and development and leadership and management needs. It must however be noted that one of the difficulties of working collaboratively on such a project is that there is competition amongst the libraries for staff, particularly in leadership roles across the sector and where there is more than one university in the city.

6.3   Attracting staff to the profession

Concerns about attracting younger people to the library profession became evident during the course of this research project both in the interviews and the literature review but the scope of this study prevented this being explored in greater depth. Future research into the quality and relevance of the professional qualifications on offer in New Zealand and whether in fact a professional qualification is necessary for all library roles in the future as new skill sets are identified to undertake new

tasks. I have become aware recently that a review of the Master of Information Studies is underway so it will be interesting to see the outcome.

A greater focus on becoming an employer of choice and developing strategies to attract a more diverse range of staff in terms of ethnicity, age, gender and skill sets could potentially open up new recruitment opportunities. Exploring opportunities in this regard merits further research.

6.4   Performance management

The issue of older workers remaining in the workforce for longer, people across a range of ages staying too long and not keeping their skills up to date were raised by most of the participants. The senior managers expressed concerns about managing performance issues of older workers who in some cases are delaying the career progression of younger staff. However the issue of managing these staff and dealing with performance issues was not fully addressed and I feel that this merits further attention in the future. There are opportunities for further research into the role of managers in dealing with performance appraisal and management and addressing poor performance. This seems to be a weakness in university libraries and possibly the university sector more broadly.

6.5   Leadership and management development

Concerns have been raised about the leadership and management capacity in New Zealand university libraries. As discussed in the literature review the Department of Labour has highlighted the need for an improvement in management and leadership skills in New Zealand so this issue is not unique to libraries.

Librarians are generally service oriented people who do not necessarily make good leaders and managers and this was raised by the participants with regard to managing change, the ageing workforce, performance management and training

and development issues. There was some discussion about leadership and management development but there was no conclusive agreement on a solution to the problem. This would be an interesting area for further research into different leadership model as libraries look to strong, innovative leaders now and into the future to deal with the transformational changes facing libraries.

Chapter 7

Conclusion

University libraries are facing significant changes in the future and as has been discussed librarians can no longer wait and see what may happen but need to act now to ensure that libraries remain relevant with regard to the service provision and the skills and competencies of the staff working in the library. Workforce planning was never more important than it is now to ensure that university libraries are able to anticipate and adapt to these changes.

The trends and issues affecting workforce planning in New Zealand university libraries that were identified by the participants correlated quite closely with those identified in the literature review. This was not unexpected as university libraries operate in a similar environment around the world and are facing similar challenges. The areas of similarity discussed included the technological changes in areas such as mobile technologies and social networking tools that are impacting service provision as well library staff skills as libraries increasingly shift to virtual service provision.

New Zealand university libraries are not as far advanced as their counterparts in other parts of the world in the area of research support for data curation and management. However it was acknowledged that this is an area that requires attention in the future, particularly as the need to increase research capacity in New Zealand was identified in the Tertiary Education Strategy.

It was surprising but not entirely unexpected that although there was recognition of the importance of workforce planning that none of the New Zealand university libraries who participated in the interviews has developed one. As discussed in the literature review the ageing of the university library workforce is an issue that affects most countries and this is no different in New Zealand university libraries.

However it would be beneficial to obtain more accurate statistics to assist with planning for the retirements expected in the next ten to fifteen years.

Concerns were raised with regard to the recruitment and retention of younger people to the profession and more particularly to university libraries in the future. A greater focus on becoming an employer of choice has been identified as an important aspect for consideration if New Zealand university libraries are going to recruit talented staff to the profession in an increasingly competitive market. On-going training and development and ensuring that work is interesting and challenging were identified by the younger participants as important motivators for retention.

One of the problems that New Zealand university libraries need to deal with is the 'stayers' who have been in their jobs for a long time and are not prepared or able to adapt to the changing environment. A robust performance management process is required to deal with these problems and in fact should be an integral part of the retention strategy.

Innovative and visionary leadership was identified as an important aspect of successful workforce planning if university libraries are going to remain relevant in the future. There are concerns about the fact that the majority of leaders are likely to retire in the next decade or so and that the younger generation librarians are reluctant to take on these roles. The provision of leadership and management training opportunities including mentoring that encourage staff to take on a broader range of leadership roles and responsibilities should be implemented across the organisation.

In conclusion this study has provided useful insights for libraries wishing to embark on a workforce planning process in the future and there is also potential for the findings of this study to link in with the BERL report on academic workforce planning in New Zealand universities. Potentially these findings could be

informative for other public sector organisations that are affected by similar trends and issues.

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Appendix 1

Email calling for volunteers to participate in a research project

Are you a qualified librarian born in or after 1975? If so you are invited to take part in a research project on the "Issues affecting and influencing workforce planning in New Zealand university libraries."

I am undertaking this research project as part of a Masters of Business degree and am looking at issues to do with attracting and retaining younger staff as the Baby Boomers progressively leave the workforce and libraries seek to meet the challenges facing universities in the 21st century.

A Participant Information Sheet is attached with further information about the project.

Thank you for your consideration of this request and I look forward to hearing from those who meet the criteria by Friday 25 November 2011.

Please contact me or my supervisor for further information:

Researcher Contact Details:
Gillian Barthorpe, *gillian.barthorpe@aut.ac.nz,* 09 921 9999 ext 8630

Project Supervisor Contact Details:
Prof Erling Rasmussen, *erling.rasmussen@aut.ac.nz,* 09 921 9999 ext 5916.

Appendix 2

Participant Information Sheet

Project Title

Trends and issues affecting workforce planning in New Zealand university libraries.

An Invitation

My name is Gillian Barthorpe, and I am studying for a Masters of Business degree. I would like to invite you to take part in an interview that will take approximately one hour to share you expertise and ideas on the trends and issues affecting workforce planning in New Zealand university libraries. The interviews will take place at your institution either on site or via telephone at time suitable to you.

What is the purpose of this research?

The primary purpose of this research is to identify the issues affecting workforce planning in New Zealand university libraries within the context of the vision for the future of universities in the 21st century. The workforce issues include the ageing workforce and the need to attract and retain younger staff with necessary skills.

The interview will contribute to my dissertation for the completion of a Masters of Business degree. There may also be the opportunity for a journal article and/or conference presentation.

How was I identified and why am I being invited to participate in this research?

You have been invited to participate in this research project because you have been identified as being in one of the three following groups:

Group one – the eight New Zealand University Librarians will be invited to participate in this research or to nominate a representative from the Senior Management Team.

Group two – a group of qualified librarians, born after 1975, from the three universities in Auckland (University of Auckland, Massey, Albany and AUT) will be invited to participate in this research.

Group three - two Human Resources staff, one from AUT and one from University of Auckland, with knowledge of workforce planning policies, will be invited to participate in this research.

What will happen in this research?

You will be invited to participate in a semi-structured interview with the researcher; there is no obligation to answer any questions that you are not comfortable with.

What are the benefits?

University libraries in New Zealand, like in the rest of the world are at crossroads with the rapid advances in technology and need to plan for the future if they are to continue to make a viable contribution to the academic community. The findings will potentially

benefit AUT and other university libraries in their workforce planning.

How will my privacy be protected?

Your identity or the name of your institution will not be used in the report.

What are the costs of participating in this research?

It is anticipated that the interviews will take approximately one hour and there may be a need for follow up to clarify or elaborate on particular points.

What opportunity do I have to consider this invitation?

Please address any questions or concerns to me by email or telephone (contact details below).

How do I agree to participate in this research?

Please complete the attached Consent Form and return it to gillian.barthorpe@aut.ac.nz by Friday 9 December 2011

Will I receive feedback on the results of this research?

An executive summary of the findings will be made available electronically, if you wish to see them.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Prof Erling Rasmussen, *erling.rasmussen@aut.ac.nz,* 09 921 9999 ext 5916.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEC, Dr Rosemary Godbold *rosemary.godbold@aut.ac.nz*, 921 9999 ext 8860

Whom do I contact for further information about this research?

Researcher Contact Details:
Gillian Barthorpe, *gillian.barthorpe@aut.ac.nz,* 09 921 9999 ext 8630 or 021 263 1220

Project Supervisor Contact Details:
Prof Erling Rasmussen, *erling.rasmussen@aut.ac.nz,* 09 921 9999 ext 5916.

**Approved by the Auckland University of Technology Ethics Committee on 20 October 2011,
AUTEC Reference number 11/204.**

Appendix 3

Consent Form

Project title: Trends and issues affecting and influencing workforce planning in New Zealand university libraries.

Project Supervisor: Prof Erling Rasmussen

Researcher: Gillian Barthorpe

○   I have read and understood the information provided about this research project in the Information Sheet dated 7 February 2012.

○   I have had an opportunity to ask questions and to have them answered.

○   I understand that notes will be taken during the interviews.

○   I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.

○   If I withdraw, I understand that all relevant information, or part thereof, will be destroyed.

○   I agree to take part in this research.

○   I wish to receive a copy of the report from the research (please tick one): Yes○ No○

Participant's
signature...…………………………………………………………
…
Participant's name:
....
Participant's Contact Details (if appropriate):
………………………………………………………………………………………..
………………………………………………………………………………………..
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………………………………………………………………………………………..
Date:

Approved by the Auckland University of Technology Ethics Committee on 20 October 2011 AUTEC Reference number 11/204

Note: The Participant should retain a copy of this form.

Appendix 4

University Librarian/ Senior Management Interview Questions

Semi-structured interview questions

1. What do you think are the main challenges and trends for NZ universities in the next 5 -10 years?

2. How do you think these challenges and trends will this impact on libraries?

3. In light of these issues does your library have a workforce plan in place?

4. How do expect this will influence your attempt to be an employer of choice for new library graduates?

5. What do you consider to be the barriers, if any, to attracting staff with the necessary skills into university libraries?

6. What is the average number of applicants you receive when recruiting for qualified positions?

7. Is staff retention a concern for your library?

8. What do you think are the main reasons?

9. Does your library conduct exit interviews when staff leave?

10. How is or should the data be used?

11. What training and development opportunities are available to staff in your library?

12. As the Baby Boomers reach retirement age attracting staff with the necessary leadership and management skills appears to be a problem.

   a. Is this the case in your library?

   b. If so, how is your library dealing with the problem?

13. What do you think are the main areas of concern with regard to recruiting to positions of leadership?

14. What leadership training and development opportunities should New Zealand university libraries be providing either individually or collectively?

15. Are the any areas of particular concern with regard to longer serving staff members in your library?

16. What sort of performance management tools does your library have in place to deal with these issues?

Appendix 5

Younger Staff Interview Questions

Semi-structured interview questions

1. What attracted you to the library profession?

2. What made you decide on a university library in particular?

3. How well do you think your library qualification has equipped your for job?

4. Where do you see yourself in the next 5 – 10 years?

5. What support/development opportunities will you require to reach your goal?

6. What do you see as the greatest stumbling blocks to progressing in your library career?

7. Do you see yourself in a leadership role in the future, if not, why not?

8. Have you considered other career options?

9. What other career options have you considered?

10. What would motivate you to stay in the Library profession?

11. What do you think are the main challenges and trends for NZ universities in the next 5 -10 years?

12. How do you think these challenges and trends will this impact on libraries?

Appendix 6

Human Resource Staff Interview Questions

Semi-structured interview questions

1. What do you think are the main challenges and trends for NZ universities in the next 5 -10 years?

2. What do you think will be the greatest challenges with regard to staff over this time period?

3. Is there a workforce planning policy in place for the university?

4. If so, please tell me about it.

5. What staff development policies are in place?

6. Do they differ for academic and general staff?

7. Where do library staff fit in terms of staff development policies?

8. What are the turnover rates for staff across the university?

9. Do the library staff mirror this pattern?