

## New manager training

*As stipulated in Take-Home Final hand-out: Over the next year, plan new-manager training. You have four months until five new branches open. New managers can be spared for two half-day sessions before opening, and once a month after that. Total possible sessions: 10 (2 in the 4 months before opening, plus one a month for the rest of the year).*

My job as associate director in this situation is to help these people become effective, confident managers. I will focus on maintaining a positive, can-do attitude, and will emphasize to them as a group that they are not alone: they can and should consult with one another during these months, as well as with me. We are a managerial team, working together to provide the best possible service to our public, who have just given us a rather impressive mandate to enact that service. We will need to rely on each other's skills and insights (which are also impressive) as we traverse the terrain of this enormous and exciting change for our library system.

I will be their "coach" through this transition, and will be their link to the director. If they want more training or information in specific areas, or if they have ideas for improving procedures and service, I am their "go-to" person. If they experience difficulties or confusions regarding any of their tasks as managers, they should let me know. I'm here for them. I have every confidence in their abilities, but I know they are facing a major change in their work lives (as are we all). We can face any challenge with reasonable grace and good cheer, so long as we keep communications open and don't keep problems to ourselves. And of course it doesn't hurt to maintain a healthy sense of humor!

The following outline of topics gives an overview of the ten projected half-day training sessions over the coming year: two before the opening of the new branches (four months away), plus one a month after that. This outline will be provided to the manager-trainees as well, so they can know what's ahead and make suggestions for topics on which they might want more clarification (or on which they need less). The outline is followed by a more detailed agenda for the first session which I (the assistant director) would use as notes for conducting the meeting.

Each session after the first will include a review and assessment of what went before, as well as time to "compare notes" and swap experiences amongst ourselves as the transition progresses. Each four-hour (half-day) session will include a break half-way through, with refreshments provided. Videos may be shown, and/or group exercises performed, which may not be specifically listed in the outline.

In the outline, early sessions are more detailed. As time passes the new managers will contribute more and more to the structure of their training—asking questions, making suggestions, offering their experiences. More time will be spent in feedback and the sharing of observations and ideas.

## I. Brief Outline of Session Topics

### **Before the Branches Open:**

#### Session 1: Overview

*A. Introduction:* We are a team. Come to me with any problems or suggestions. Confer with each other in the months ahead.

*B. What is Management?*

*1. The Practical*

*2. The Human*

#### Session 2: Staffing and Safety: an overview

Since we are in the process now of staffing the new branches and getting ready to work in our new buildings, we'll begin our own training here.

*A. The Practical*

*1. Staffing*

- Hiring; training (new employee orientation); evaluating (clarify library procedures and standards for employee evaluations).
- Scheduling: policies for covering or swapping shifts, etc.
- Review established grievance procedures, discipline and conflict resolution policies.
- Review established staff development policies (benefits, merit recognition, support for further training and professional development).

*2. Safety*

- Know safety systems and procedures for each building, communicate to staff (drills).
- Know security procedures and security systems for each building; communicate to staff.
- Review policies and procedures for dealing with difficult patrons and/or potentially violent conflicts.
- Maintain a "healthy" building (coordinate with maintenance/custodial staff).

*3. The Technology in your building*

- Computers and software for staff; computers and software for patrons.
- Training for staff: getting everyone oriented to the systems we use.
- Know where your wiring and telecommunications hardware is and how to protect it.
- Who to call for maintenance/repair.

*B. The Human*

- Recognizing excellence; paying attention to staff development and opportunities for involvement; staff morale and well-being (including physical: ergonomics, allergies, etc.)
- Budget-free ways to build morale (hoopla, flexible scheduling, day-to-day rewards, etc.)
- The art of constructive criticism; the art of praise.
- Being sure everyone feels secure with the physical aspects of your building, its security systems, and its computers and wiring.
- Be accessible; be confident. Make sure your people know who to go to with questions and problems (their supervisor, if applicable, then you), especially in the early days as we "break in" the new branches. Keep communications open, especially with supervisors—and with me!

**After the Branches Open:****Session 3: Staffing and Safety: continued**

*How are we doing so far? Share experiences.*

***A. The Practical***

- How are your buildings? Is anything unclear about safety or maintenance? Any problems in the new facilities?
- How are your computers? Any problems with the network or questions about it? How is your staff doing with the system?
- Do you have the staff you need? Are you happy with their performance? Any problems?
- Strategies for holding effective meetings.

***B. The Human***

- Keeping the job worthwhile: 5 core dimensions for job enrichment (skill variety; task identity; task significance; autonomy; feedback).
- More on evaluations: collaboration between supervisor and employee to make work better. The objectives: 1) identify problems employee has in performing tasks; 2) plan methods to resolve any problems; 3) determine employee's level of satisfaction with the job, the library as a system, and the library as a working environment; 4) plan ways to improve performance and enrich the job, prepare for advancement or other rewards.
- Yet more on evaluations: pitfalls to avoid. Suggestions?
- Being aware of the social dynamics among your staff, and of your own social roles.
- Organizational culture: knowing our assumptions; creating a positive, supportive, open, service-oriented environment. What kind of culture do you see in your branch?

**Session 4: Patrons and Customer Service**

*How are we doing? Share experiences.*

***A. The Practical***

- How are your relations with patrons? What situations or conditions are special for your branch?
- Courtesy; going the extra mile.
- How is your staff doing with service in the new branch?
- What are your "high traffic" times, and do you have them covered?
- Saying "yes" as much as possible; minimizing the "no"s and "can't"s in your answers to patrons. Replace "I can't" with "I can do this instead".
- Public computing and internet policies: the concept of positive enforcement. How is it going? Is anything unclear or difficult to manage?
- Do patrons have what they need to use library computers satisfactorily? Are staff available and able to answer their questions? Any problems or concerns in this area?
- Children in the library: their supervision (preferably not by your staff!) and safety.
- Young adults in the library: they're not your enemy! Policies and strategies.
- Homeless in the library: what we can and cannot do, what we want to offer. Any problems or complaints? Any suggestions?

***B. The Human***

- Dealing with "problem" patrons and conflict situations.
- Keeping priorities clear. Do your staff know what standards are?

- How are you doing with manning reference desks and other “points of contact”? Do you have what you need to give good service? Do staff feel comfortable with the level of service they’re being asked to supply?
- Have you received requests from customers for programs or services that you want to pursue?
- What ideas or suggestions do you have regarding customer service in your branch?

### Session 5: Organizing; Reporting

*How are we doing? Share experiences.*

#### 1. Organizing

- Standards of authority, cooperation, and communication. Do your staff know what you expect of them? Do you know what they expect of you?
- Be sure that supervisors have the support and authority they need to do their jobs (with minimal interference from you).
- Do you have the support and authority you need to do your job? Is anything unclear or insecure for you in your new position?
- Exercising authority without imposing tyranny.

#### 2. Reporting

- What I (and the director) need from you: patronage figures (circulation and reference statistics); staff evaluations; description and evaluation of library programs in your branch; security statistics; building status/maintenance needs; expenditures.
- Formats for reports (where the templates are in the system).
- What reports are needed when.
- Any questions?

### Session 6: Personality Types and Conflict Resolution

*How are we doing? Share experiences.*

#### 1. Personality Types

- Employee “styles”: the Task-Oriented/People-Oriented–Passive/Abusive axes; Control vs. Responsiveness.
- Manager “styles”: the Relationship–Task axes (Influence; Direction; Collaboration; Delegation)
- What to do when personal styles conflict in the workplace (communicate–listen effectively; collaborate for solution; focus on behavior, not personality; don’t make it personal).
- Know yourself: how do you normally react to conflict or disagreement? Be aware of your own biases and sensitive areas (“pet peeves”); be aware of your own anger and stress patterns and work to manage your “tolerance levels” with more finesse if necessary. Try to consider and react, rather than feel and respond.

#### 2. Conflict Resolution: 10 Steps

Useful reference: Bobbi Linkemer, Solving People Problems: The Essential Guide to Thinking and Working Smarter. New York: American Management Association, 2000.

- Assume an open-minded attitude (win: win scenario): see the other person’s perspective; demonstrate respect.
- In planned resolution meeting, prepare for the discussion: know what you want to say and

- prepare how to say it; mentally practice your listening skills.
- Set the scene for resolution (appropriate venue–e.g., not out in the hallway); clarify the central issues.
- Confirm to all parties your understanding of the issues.
- Let the other person/people talk.
- Identify areas of agreement.
- State your position.
- Talk through areas of contention (listen; avoid judgmental or “loaded” language)
- If possible, resolve the issue (plan of action: collaboration toward what is now a common goal–no longer a conflict).
- Follow through: make sure all parties are satisfied with the resolution after the fact.

### Session 7: Directing (Leadership)

*How are we doing? Share experiences.*

- Manager styles (review and expand from last session)
- Opportunities to inspire
- Lead by example
- Public Relations

### Session 8: Planning

*How are we doing? Share experiences.*

- Keep basic values clear. What is our mission? What are our goals?
- For specific projects, keep objectives clear, and clearly delineated. What do we want to achieve with this program? How will we know we’ve done it well? What do we need to get it done?
- Planning to plan: know what you need to decide on and what your temporal and material limits before you start; select the people who will be doing the research and planning.
- The TELL IT! approach: Talk about the vision (what you want to do); Explore alternatives and design your approach (what’s the best way to do it? what will you need in order to do it right?); Learn from what’s happening (keep evaluating all the way through; watch for results); Let people know what happened (communicate results to staff, public, management); Integrate results with ongoing services (make it a part of what you do, not an isolated activity); Think about how it all worked (ongoing process of evaluation).
- Approaches to weighing alternatives and presenting strengths/weaknesses of each option.
- Follow through: plan for evaluation; keep checking to be sure everything’s going according to plan and that the plan itself remains appropriate, relevant, and effective.
- What ideas do you have for programs you’d like to pursue in your branch?

### Session 9: Controlling

*How are we doing? Share experiences.*

- 2 senses of “control”: 1) monitoring and evaluating for improvement; 2) authority, responsibility.
- Keep your plans on track (what were our core values again? what are our goals?).
- Keep within your resources–material, temporal, human.
- Evaluate to be sure you’re using your resources effectively.

- Work to develop your resources. Reinforce and nourish what you already have.
- Be open to new opportunities—seek them out. Are there partnerships you could explore in the community? How can you develop your volunteers and involve your community in the welfare of the library? Are there gifts, talents or skills among your staff that aren't being used that could benefit the library? What ideas do your staff have?
- Monitoring and evaluating: establish and maintain your standards for library performance; measure performance against those standards; correct for deviations from the ideal.
- Establishing standards and communicating them clearly can be a big challenge. Be sure that 1) you have a clear idea of the ideals for library practice and performance; 2) you communicate those ideals clearly to your staff; 3) you keep aware of how (or whether) those standards are being consistently met.
- Once again: clear understanding of values and goals, open communications, trust and respect with your staff are key.

### Session 10: Open Topic

We will use this session to cover any topics managers wish to explore more fully, or to discuss issues of managers' choice which have not yet been addressed. Additional sessions can be scheduled as desired; as members of management we will meet regularly for reports and evaluation (and mutual support).

## II. Detailed Agenda for the First Session

### A. Introduction

- Welcome! We are a team: we will work together through this transition. Come to me with any problems or suggestions. Confer with each other in the months ahead.
- Why we're here: review the library's Mission Statement and Vision Statement. This will always be our shared "bottom line".
- Pass out and go over outline of topics for training sessions.
- Exercise: go around the room: which of these topics do you think you have the most experience in or familiarity with already? Which the least?
- You are already experts in library service. You just have a new set of skills to learn as managers—and you already know more about it than you might think you do!

### B. What is Management?

*Management is the smooth running of an organization. An organization is a group of people working together to achieve shared goals to further the interests of the group.*

#### 1. The Practical

- The manager is the intermediary between those doing the everyday work, and those who make the big-picture decisions. You will be responsible for your branch staff; I will be responsible for you and for the main branch staff; the director is responsible for me and for the library system as a whole.
- Management means: knowing what the jobs are, defining the jobs; fitting the right person to each job; ensuring that each person has what he or she needs to do his or her job well; establishing policies and procedures for doing jobs as well as for internal communications (recognizing excellence; responding to problems; grievance procedures); representing

- your staff to the organizational decision-makers.
- POSDCORB (Gulick & Urwick, 1937): Planning; Organizing; Staffing; Directing; Coordinating; Reporting; Budgeting (or the simpler version: Planning; Organizing; Controlling). Brief exposition of each (to be covered in detail in later sessions).
- *Clarification*: you will not be doing detailed budgeting, but will report your branch needs and status to me for the system-wide budgeting done in the main library offices. Many procedures and standards will be set by the director or by established library policies that we already follow. Your goal: unified implementation in the new branches.
- Organizational context: PEST: Political, Economic, Social, and Technological factors.

-Break-

## 2. *The Human*

- First and last, our work depends on people, and is designed to provide service to people. The personal needs of your staff and patrons and how those needs get expressed, along with the social interactions among your staff and patrons, can bring you your greatest challenges as a manager.
- People have wants and needs outside the job as well as within it. Maslow's Hierarchy of Needs (Physiological; Safety; Social; Esteem; Self-Actualization) and Rewards (Physical, Social, Growth).
- Respect your people; respond to them as individuals. The Golden Rule hasn't lost any karats!
- Be sure your people have what they need; keep communications open.
- You are a leader: you set the example for attitude, behavior, performance. You have the opportunity and responsibility to encourage your people, recognize their strengths, help them develop and grow in their jobs, mediate their disagreements or personality conflicts, and keep everyone motivated by our common mission in the library.
- When we talk about staff (and management), we are talking about a social world as well as the practical "human resources" aspect of the workplace.
- Organizational culture: the assumptions behind how we do things and how we think about our work, as well as the ways of doing things that make up who we are.
- Be aware of nonverbal messages you might be sending (e.g., what you value or de-value in the work of your staff and in your own work; attitudes you have toward upper management and toward the public; how you respond to inter-personal conflict or disagreements).

## C. *Closing Thoughts*

- There is no single set of sure-fire "rules": we learn principles to guide us, but must respond appropriately to our distinctive situations.
- You're human, too! Cut yourself some slack in this process. It's a learning curve for all of us. Keep a generous, supportive attitude toward yourself as well as toward your staff.
- Count on me; count on each other. See you next time!