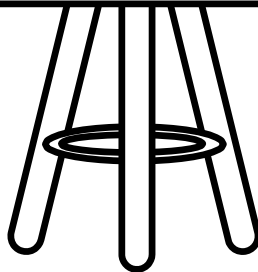


ALLOCATING STAFF RESOURCES



ALLOCATING STAFF RESOURCES

Agenda

Getting Things Done: Being an Effective Manager

- A Manager's Responsibilities
- The Managerial Grid
- Getting Things Done
- Measuring and Using Your Influence
- Coaching to Develop Managerial Skills
- Why Managers Succeed

Change in the Real World: Adapting to New Activities

- Getting Things Done
- Key Points
- Responsibilities

How Do Staff Spend Their Time: Gathering Data about Staff

- Estimates of Productive Work Hours
- Ways to Collect Data About Staff Activities
- Types of Workload Measures
- Numeric and Process Analysis

"But We've Always Done It this Way:" Confronting Sacred Cows

Managing Change

A MANAGER'S RESPONSIBILITIES

PLANNING FOR THE UNIT

ACCEPTING RESPONSIBILITY FOR ACHIEVING PRIORITIES IDENTIFIED IN THE UNIT PLAN

MAKING AND IMPLEMENTING DECISIONS THAT AFFECT THE UNIT

ORGANIZING THE WORK OF THE UNIT TO ENSURE THAT UNIT PRIORITIES ARE MET

IDENTIFYING AND RESOLVING PROBLEMS PROMPTLY AND EFFECTIVELY

COORDINATING THE WORK OF THE UNIT, BOTH INTERNALLY AND WITH OTHER UNITS OF THE LIBRARY

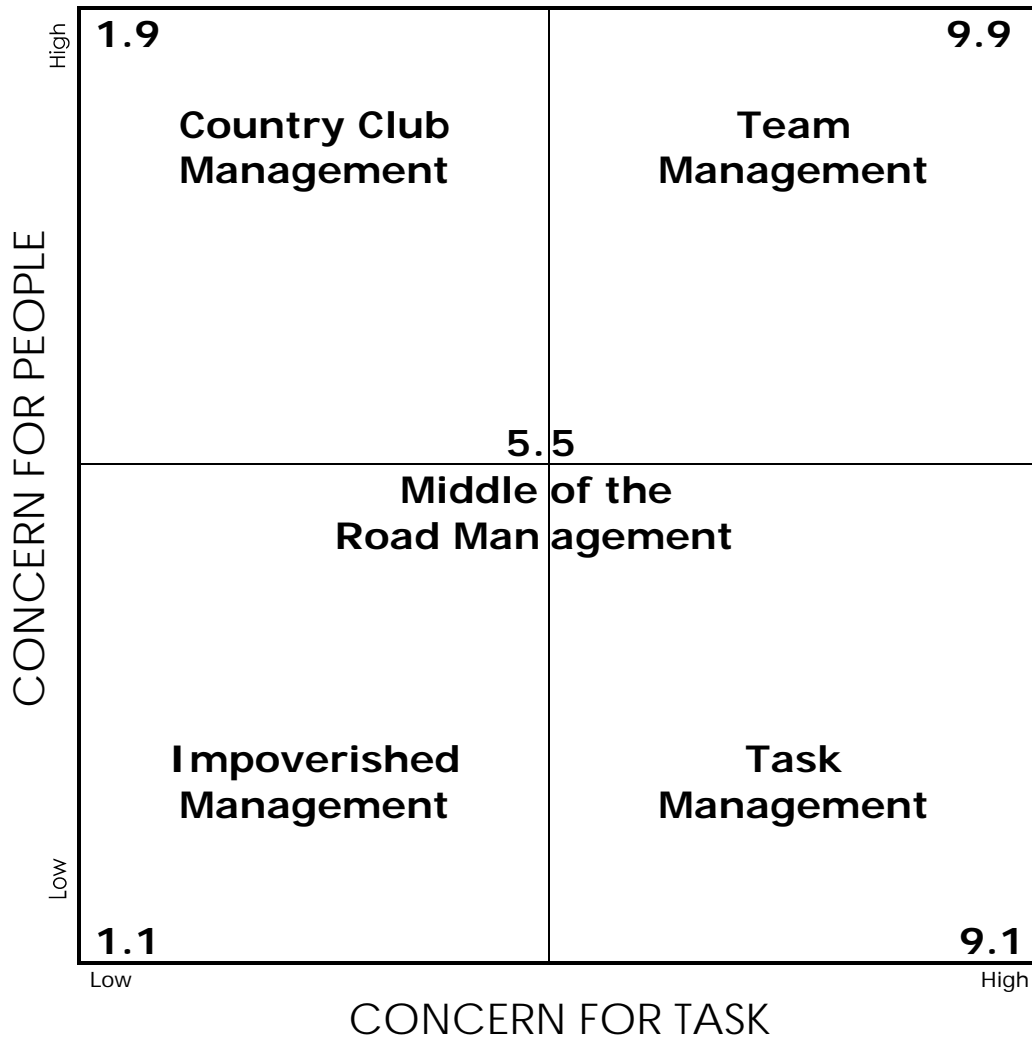
IDENTIFYING RESOURCES THAT ARE NEEDED IN THE UNIT AND PREPARING AND IMPLEMENTING A PLAN TO OBTAIN THOSE RESOURCES

MANAGING THE RESOURCES THAT ARE ALLOCATED TO THE UNIT AND BEING ACCOUNTABLE FOR THEIR INTERNAL ALLOCATION AND USE

COLLECTING DATA AND EVALUATING THE PROGRESS BEING MADE TOWARD REACHING THE UNIT PRIORITIES

COMMUNICATING EFFECTIVELY WITHIN THE UNIT, WITHIN THE LIBRARY SYSTEM, AND WITH THE PEOPLE SERVED BY THE UNIT

THE MANAGERIAL GRID



Source: Robert Blake and Jane Mouton. *The New Managerial Grid*. Houston, Texas: Gulf Publishing Co., 1978.

THE MANAGERIAL GRID – PART II

LIST EXAMPLES OF BEHAVIORS FOR EACH TYPE OF MANAGEMENT STYLE.

Country Club Management	Team Management
Impoverished Management	Task Management

WHAT DETERMINES YOUR MANAGEMENT STYLE?

CHARACTERISTICS OF THE MANAGER

- Values
- Knowledge and training
- Experiences
- Role models
- Goals and ambitions
- Self-Confidence
- Confidence in employees

CHARACTERISTICS OF THE EMPLOYEES

- Knowledge and training
- Willingness to assume responsibility
- Experience with decision-making
- Tolerance for ambiguity

CHARACTERISTICS OF THE SITUATION

- The community culture
 - The organizational culture
 - The organizational structure
 - The urgency of the situation
-

YOUR MANAGEMENT STYLE

What is your management style? _____

Describe the strengths of that approach to management.

Describe the weaknesses of that approach to management.

What can you do to build on the strengths?

What can you do to address the weaknesses?

GETTING THINGS DONE

The degree of power that managers have to affect an outcome can be plotted on a continuum: they can **control** a situation, **manage** a situation, **influence** a situation, or they can have **no control** over the situation. The ability of a manager to control the outcome of a specific situation depends on the external environment and the role of manager in relation to others involved in the task or process. List examples of situations in which you have each level of control in the columns below:

Control <i>Have the power to direct or determine the outcome</i>	Manage <i>Plan and deploy resources to accomplish the outcome</i>	Influence <i>Shape or modify the behavior of others to affect the outcome</i>	No Control <i>Have no power to direct or determine the outcome</i>

MEASURING YOUR INFLUENCE

YOUR UNDERSTANDING OF THE SITUATION YOU ARE TRYING TO INFLUENCE

- Your understanding of all of the aspects of the situation
- Your definition of what a successful outcome would be
- The fit of your proposed solution to the situation
- Your ability to help people understand your point of view
- Your recognition of other individuals or groups that may be trying to influence the situation

YOUR UNDERSTANDING OF THE PERSON OR PEOPLE YOU ARE TRYING TO INFLUENCE

- Your understanding of the perspective or viewpoint of the people you are trying to influence
- Your understanding of the reasons for their perspective or viewpoint
- Your ability to convince people that you understand their points of view
- Your ability to describe “what’s in it for them;” to define a win/win outcome
- Your broader support base, including other key influencers
- Your ability to identify and garner support from others

THE RELATIONSHIP BETWEEN YOU AND THE PERSON OR PEOPLE YOU ARE TRYING TO INFLUENCE

- The strength of the relationship
- The mutual levels of trust in the relationship
- The successful negotiations you have shared in the past
- Successful implementation of earlier solutions

YOUR SKILLS, ABILITIES, ATTITUDES, AND POSITION

- Your communication skills
 - Your timing
 - Your tone and approach
 - Your sincere desire for a win/win outcome
 - Your credibility
 - Your persistence and commitment
 - Your role, position, and authority
-

USING YOUR INFLUENCE

- 1. You have a number of staff members who need training to provide the services identified the unit plan.**

What is the situation? _____

Who are the people involved? _____

Describe the relationships: _____

What would you do to resolve this situation? _____

- 2. You need to expand your teen collection to support the services identified in the unit plan.**

What is the situation? _____

Who are the people involved? _____

Describe the relationships: _____

What would you do to resolve this situation? _____

3. You want to change the duties assigned to a staff member to better provide the services identified in the unit plan.

What is the situation? _____

Who are the people involved? _____

Describe the relationships: _____

What would you do to resolve this situation? _____

4. You need to rearrange the shelving and furniture in your unit to make room for more public access computers to provide the services identified in the unit plan.

What is the situation? _____

Who are the people involved? _____

Describe the relationships: _____

What would you do to resolve this situation? _____

COACHING TO DEVELOP MANAGERIAL SKILLS

Coaching is the art of inspiring, energizing, and facilitating the performance, learning and development of the player.¹

DEFINE PERFORMANCE EXPECTATIONS

- Be explicit about the performance you expect from the manager.
- Define performance expectations in terms of measurable results or behaviors.
- Use the branch/unit goals and objectives as the context for defining expectations.

DESCRIBE NEEDED IMPROVEMENTS

- Work with the manager to define areas in which the manager needs improved skills to meet the defined performance standards.
- Do your homework and be prepared with specific examples of behaviors or work products that illustrate the needed improvements.
- Be honest and open, but remember the Golden Rule.
- Practice what you will say before the meeting.

DEVELOP A PERFORMANCE PLAN

- Involve the manager in identifying possible ways to improve his or her skills to meet the identified performance standards.
- Quick solutions rarely solve anything.
- There is never just one way. Be open to exploring options.
- Remember that one size does not fill all – every performance plan will be different. Focus on identifying and building on each manager's strengths.
- Review the options with the manager and select the option or options that appear to most effective.
- Identify expected behaviors or accomplishments and timelines in the performance plan.
- Put the performance plan in writing, sign it, and have the manager sign it.

MONITOR ACCOMPLISHMENTS

- Monitor the manager's progress regularly.
- Look for positive signs to reinforce, not only negative signs to correct.
- Provide encouragement and positive reinforcement
- Be unconditionally constructive.
- Create an environment in which people feel value and respected.

¹ Myles Downey. "Effective Coaching." (London: Texere, 2003).

WHY MANAGERS SUCCEED

THEY UNDERSTAND AND SUPPORT THE LIBRARY'S MISSION AND SERVICE PRIORITIES.

THEY COMMUNICATE EFFECTIVELY WITH THEIR SUPERVISORS, COLLEAGUES, AND/OR SUBORDINATES.

THEY ARE FLEXIBLE AND ADAPT EASILY TO CHANGE.

THEY ARE CONSISTENT AND TREAT PEOPLE FAIRLY.

THEY ARE ABLE TO SET PRIORITIES AND UNDERSTAND THE DIFFERENCE BETWEEN *IMPORTANT* AND *URGENT*.

THEY ARE WILLING TO TAKE RISKS AND DEAL WITH THE CONSEQUENCES.

THEY ARE ABLE TO RECOVER FROM SETBACKS.

THEY CAN HANDLE CONFRONTATION.

THEY LOOK FOR WIN/WIN SOLUTIONS TO CONFLICTS.

THEY KNOW HOW TO MANAGE THEIR STRESS.

THEY CONTINUE TO GROW AND LEARN.

GAP ANALYSIS CASE STUDY

II-A: STAFFING DATA

As we learned earlier, Rosa is the director of the Anytown Public Library and the library has just completed a new strategic plan. Goals and objectives have been selected and staff have completed identifying preliminary activities (Analyzing Activities Case Study, Parts I, II, and III). Now Rosa and her staff are ready to determine what staff resources would be required to accomplish the activities under review.

One of the activities is to present four story programs a month in day care centers in Anytown. Rosa and the staff in the children's area are working on a gap analysis to determine what resources will be required to implement the activity and where the resources will come from.

Activity: Present four story programs a month in day care centers in Anytown

Most important resource: Staff

1. What will Rosa and the staff need to know to determine how much staff time will be required to plan and present the story programs in day care centers?

2. What will Rosa and the staff need to know to determine how much staff time is currently being allocated to planning and presenting story programs in day care centers? _____

3. How will Rosa and the staff determine the gap or difference between what they will need and what they have currently allocated?

4. What data will Rosa and the staff need to decide what resources are needed to fill the gap?

GAP ANALYSIS CASE STUDY II-B: STAFFING ESTIMATES

ACTIVITY: Present four programs per month in day care centers in the community			
	Need	Have	Gap
Resource <i>STAFF</i>			
Plan for Filling the Gap or Reallocating the Surplus:			

Purpose of Workform S6

Use this workform to calculate the total number of hours available annually for any one category of staff.

Sources of Data for Workform S6

Library personnel policy and library budget for staff authorized provide the information for this workform.

Factors to Consider When Completing Workform S6

1. Complete a copy of this workform for each staff category shown at the top of the workform.
2. Part of the workform focuses on predictable and unpredictable time away from work. Both kinds of time are authorized, but predictable time is routine, while the unpredictable time varies by circumstances affecting staff.
3. Be sure to account for differences in vacation days authorized for seniority among staff in the same category.
4. You might want to compile a summary sheet to calculate the total work hours available for any unit/team.
5. Do not enter data in the shaded sections.
6. For assistance in completing Workform S6, see the example.

To Complete Workform S6

1. **Lines A-D** Complete the information at the top of the form.
 - Line A* Record the number of full-time staff in a job category.
 - Line B* Record the name of the unit/team in which these staff work.
 - Line C* Record the total number of staff eligible for benefits. Then divide this number into two groups-those eligible for regular vacation and those eligible for seniority vacation.
 - Line D* Record the number of hours in the standard work week for full-time staff in this job classification.

2. **Lines E-F** Calculate the nominal staff hours per year by multiplying line A x line D x 52 weeks. (See the worked example of Workform S6.) Record the answer in the unshaded area of row F
3. **Section G** Calculate the number of predictable hours unavailable by multiplying the times authorized for vacation, holidays, and work breaks by the number of staff eligible in this job category. Record the number of hours for each in the unshaded section for each row.
 - Row G5* Add all the hours in section G and record the total in the unshaded section for the row.
4. **Section H** Record all time taken as sick or personal leave by this staff category last year. For an indication of the worst-case estimate, record all total hours for sick leave, personal days, and other (funeral time, jury duty, etc.) authorized.
 - Row H4* Add the total number of hours used or authorized for sick leave, personal days, and other. Record the total in the unshaded section for the row.
5. **Row I** Add the numbers in rows G5 and H4 and record the total.
6. **Row J** Subtract row I from row F and enter the difference in row J.
7. **Row K** If you know the number of hours budgeted or authorized for part-time staff for the fiscal year, record that number in row K.
8. **Row L** Add rows J and K and record the total in row L.

Factors to Consider When Reviewing Workform S6

1. Remember that the figure for available hours is only an estimate.
2. The time worked by part-time staff needs to be included for a complete picture of a unit's available staff hours. Be sure to subtract the time these employees are on break each day.
3. If the library provides sick leave or vacation for part-time staff, use this form to determine the number of part-time staff hours available.

A. Indicate the number and level of staff in **one** of the categories below

Librarians One Library assistants _____ Clerical _____ Pages _____

B. Unit/team Children's

C. Number of staff eligible for benefits One Regular vacation _____ Seniority vacation _____

D. Hours in standard work week 40

E. Nominal staff hours available per year: number staff = 1 x hours in standard work week = 40 x 52 weeks/yr. = 2,080

F. Nominal staff hours available/year			2,080 hours per year
G. Predictable hours unavailable			
1. Vacation			
Standard hours x number eligible	120 hours per year		
Seniority hours x number eligible	0 hours per year		
2. Holidays (in hours)	96 hours per year		
3. Daily customary breaks (2 x 15 min. x number staff)			
4. Other	116.5 hours		
5. Total predictable hours unavailable		332.5	
H. Unpredictable hours unavailable			
1. Sick leave	77 hours per year		
2. Personal days	8 hours per year		
3. Other	8 hours per year	Jury duty etc.	
4 Total unpredictable hours unavailable		93	
I. Grand total hours unavailable			425.5 hours unavailable
J. Actual full-time staff hours available for year			1654.5 hours available [80% of total]
K. Number hours of part-time staff budgeted this year			
L. Total hours available for this level per year			

Completed _____ Date completed _____
 Source of data _____ Library _____

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YOU DO THE MATH

F. Nominal hours per year = hours worked per week times 52 weeks

$$\mathbf{40 \text{ hours per week} \times 52 \text{ weeks in a year} = 2,080}$$

G1. Vacation hours per year = number of vacation days earned times the number of hours worked per day

- New staff member earns 10 days of vacation per year
- Maximum days of vacation possible is 20 days per year
- Average number of vacation days per year is 15 (although this is probably a low estimate given the longevity of staff in most libraries)

$$\mathbf{15 \text{ vacation days} \times 8 \text{ hours per day} = 120 \text{ hours}}$$

G2. Holiday hours per year = number of paid holidays times the number of hours worked per day

- Staff members get 12 paid holidays per year

$$\mathbf{12 \text{ holidays} \times 8 \text{ hours per day} = 96 \text{ hours}}$$

G3. Breaks = 30 minutes per day (two 15 minute breaks) times the number of days worked per year (the total number of days minus the vacation and holiday days) divided by 60 minutes

$$\mathbf{2,080 \text{ total hours} - 120 \text{ vacation hours} = 1,960 \text{ hours worked}}$$

$$\mathbf{1,960 \text{ hours} - 96 \text{ holiday hours} = 1,864 \text{ hours worked}}$$

$$\mathbf{1,864 \text{ hours} / 8 \text{ hours per day} = 233 \text{ days worked}}$$

$$\mathbf{233 \text{ days} \times 30 \text{ minutes per day} = 6,990 \text{ minutes in break time}}$$

$$\mathbf{6,990 \text{ minutes} / 60 \text{ minutes in an hour} = 116.5 \text{ hours in break time per year}}$$

H1. Sick leave = number of days of sick leave taken times the number of hours worked per day

- Staff members earn 12 days of sick leave per year
- Staff can use sick for personal illness or to care for member of immediate family
- Average based on staff taking 80% of his/her allocated sick days per year

$$\mathbf{96 \text{ hours} \times .80 = 76.8 \text{ hours (rounded to 77)}}$$

H2. Personal days = number of personal days taken times the number of hours worked per day

- Staff receive one personal day per year

$$\mathbf{1 \text{ day} = 8 \text{ hours}}$$

H3. Other day (jury duty etc.) = number of other days time the number of hours worked per day

$$\mathbf{1 \text{ other day} \times 8 \text{ hours per day} = 8 \text{ hours}}$$

WAYS TO COLLECT DATA ABOUT STAFF ACTIVITIES

Method of data collection	Advantages	Disadvantages
Estimates <ul style="list-style-type: none"><li data-bbox="233 436 342 470">▪ Staff <li data-bbox="233 590 440 623">▪ Supervisor		
Existing records		
Self-reports		
Observation <ul style="list-style-type: none"><li data-bbox="233 1438 418 1472">▪ Obtrusive <li data-bbox="233 1591 456 1625">▪ Unobtrusive		

TYPES OF WORKLOAD ANALYSIS

NUMERIC ANALYSIS

At its simplest, numeric analysis helps you determine how much you are getting done with the staff you have. Specifically, numeric analysis calculates the number of outputs (*products or services delivered*) produced by a specific level of effort (*employee time*).

Numeric measures can range from the very general (average number of books circulated per staff hour) to the very specific (number of steps and minutes needed to process each new videotape). As your numeric measures become more precise they take more time and effort to gather and analyze.

Numeric measures are simply snapshots of what is being done at the time the data is collected. With this information, *baselines*, which measure the current levels at which work is performed and outputs are produced, can be established.

PROCESS ANALYSIS

Process analysis determines what steps within a task are required to create a measurable output. To do this you must be able to identify four things:

- the output that is created and measured
- the starting point of the task
- the typical steps within the task
- the ending point of the task.

Process analysis identifies the steps your staff takes in producing an output for a customer. Process analysis can also help you identify who is doing what in your library.

Process analysis provides an opportunity for staff to identify problem points in a workflow, understand the factors that affect performance, and question why certain actions are taken.

Process analysis also provides the information you and your staff need to redesign work processes, which is one way to release time from current tasks to take on new responsibilities.

From *Staffing for Results: A Guide to Working Smarter*.

NUMERIC OR PROCESS ANALYSIS

WHAT DO YOU NEED TO KNOW?

If you had to address the following issues, which type of analysis would you select?

Numeric
Analysis

Process
Analysis

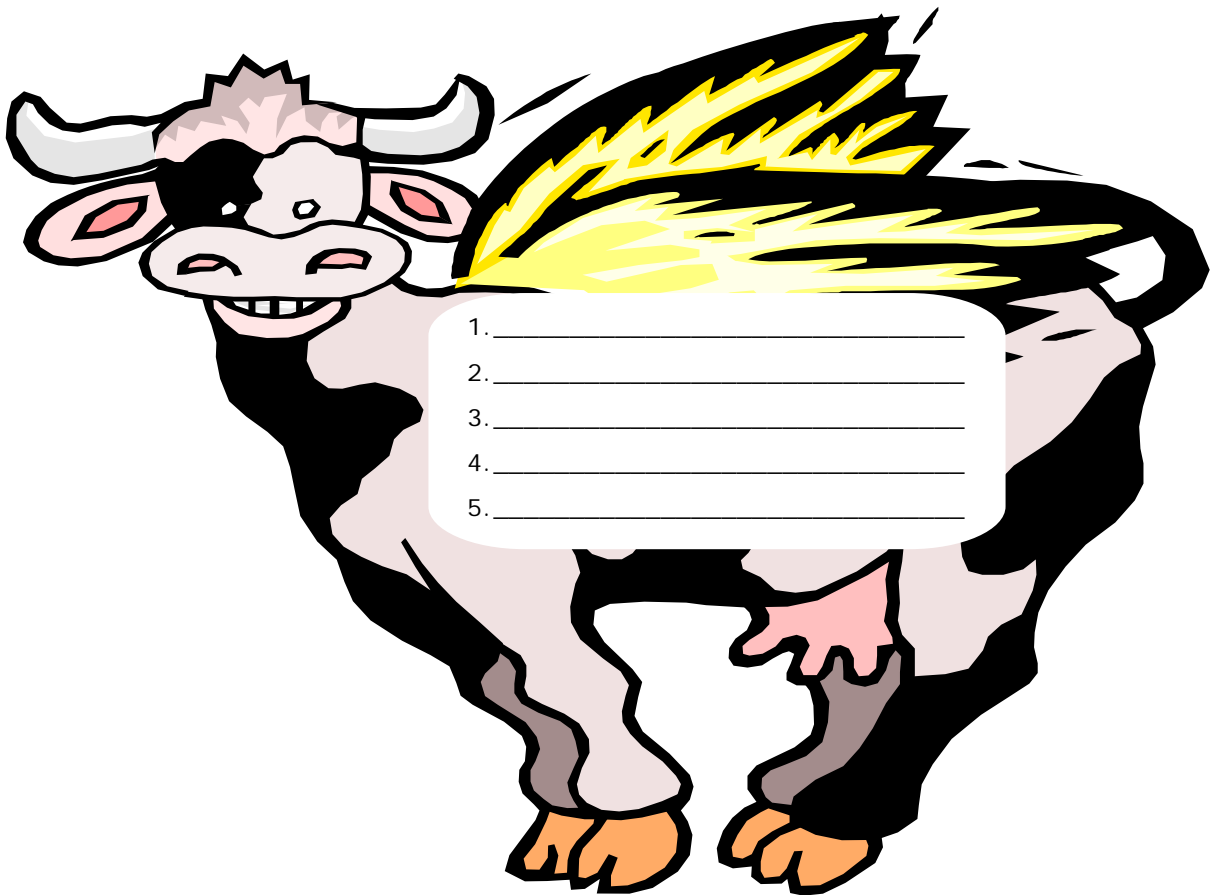
- | | | |
|-------|-------|---|
| _____ | _____ | 1. Reduce the amount of time it takes to pay the library's bills. |
| _____ | _____ | 2. Project the number of staff you need at the circulation desk for Sunday hours. |
| _____ | _____ | 3. Assess the potential impact on the department reference desks of creating a telephone-ready reference center that answers all incoming calls. |
| _____ | _____ | 4. Handle increased demand for reserves without additional staffing. |
| _____ | _____ | 5. Report on the library's performance against City/County success measures. |
| _____ | _____ | 6. Assess the affect your Gates computer lab is having on reference service. |
| _____ | _____ | 7. Determine why you never have new popular titles on the shelves at each branch the same day as the bookstore. |
| _____ | _____ | 8. Determine how much it costs to replace the bulletin board display in the Children's Room each month. |
| _____ | _____ | 9. Determine the effect that the increasing number of downloaded items being circulated will have on staffing requirements at the circulation desk. |
| _____ | _____ | 10. Identify when it is time to move from purchasing an older format to purchasing the format that is replacing it. |

PROCESS ANALYSIS

1. Determine the activity to be studied.
2. Identify the type of item or process to be counted.
3. Identify the starting point for this activity.
4. Identify the sequence of steps in performing the activity.
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.
 - g.
 - h.
 - i.
 - j.
5. Identify the ending point of the activity.
6. Determine how the data about performing the activity will be collected.

SACRED COWS

"Sacred cows" are the activities that have been done in the same way and at the same time for so long that no one even wonders if they are effective anymore. They are just "the way we do business." List some sacred cows in public libraries today.



Now list some sacred cows in your own library.

1. _____
2. _____
3. _____
4. _____
5. _____

MANAGING CHANGE

INVOLVE STAFF AT EVERY STEP OF THE PROCESS.

The more that staff have to do with designing the changes, the more comfortable they will feel with them.

DON'T GET SO INVOLVED IN THE PROCESS OF CHANGE THAT YOU LOSE TRACK OF THE REASONS FOR THE CHANGES.

Always know why you are making changes and always include the reasons when discussing changes with staff, the board, and the public.

ACKNOWLEDGE THE EMOTIONAL REACTIONS THAT WE ALL HAVE WHEN FACED WITH CHANGE.

Some change experts suggest that people dealing with change go through much the same process as people dealing with grief: shock, denial, anger, guilt, depression, acceptance, and growth. These are strong emotions and they won't just go away if you ignore them.

ACKNOWLEDGE THE CONTRIBUTIONS MADE BY THE SERVICES AND PROGRAMS THAT ARE BEING PHASED OUT.

A decision to change the priority of a service based on new community needs in no way diminishes the value of that service in the past. Celebrate your achievements and link your past successes at meeting community needs with your current efforts to continue to do so.

DON'T EXPECT CHANGE TO BE QUICK.

It took a long time to establish your current organizational norms and it will take a long time to change them. Furthermore, the larger your library is the longer it will take to change things. It is much like the difference between trying to turn an ocean liner (remember the Titanic?) and a canoe.

STAY FOCUSED ON THE END RESULT.

Your plan is intended to improve the library's service to the people of your community.

DON'T AUTOMATICALLY ASSUME THAT ALL CHANGES WILL BE EQUALLY EFFECTIVE.

Monitor changes carefully and make adjustments as needed. Be willing to publicly acknowledge that a change did not lead to expected results, if necessary.

DON'T EXPECT TO CONTROL THE CHANGE PROCESS.

No one can control organizational change. What you and other library managers can do is understand the change process and manage it.