

Stepping into management, by James Savin from Farrer & Co

When Elizabeth Dwiar (Chair of ICLG) asked me to contribute to this discussion I was initially reluctant to accept, because I didn't think I had been in management long enough to say much that was useful. Thinking more about it, I realised that we probably know more about management than we think, much of it learnt subconsciously or picked up in my case from some very experienced superiors. In fact, if we had not learnt from previous experience, then we probably shouldn't be stepping into management.

What follows is very much my experience: there are many good books on library and information unit management. My objective is to :

- put courage into those faced with a management position for the first time,
- show that if we think hard about our professional and personal experience, we will probably be heartened to realise that we do indeed have management skills.
- self-confidence is vital for the interview for the job, quite apart from doing it successfully when you are appointed.
- practical matters which I thought were crucial in the first few months.
- staff and recruitment matters

The five matters which I thought important when I stepped into management are:

- a belief in our ability to manage,
- the need to know our resources,
- the usefulness of a library policy document,
- consultation to develop that document,
- the need to maintain a high profile for the library.

Should we be worried that we do not have management skills?

Everyone has done a bit of management in their life, whether it is in work or at home. We all learn by experience. If you have ever silently disputed or questioned your own manager's decision on something or other, you are gaining experience and taking the first steps into management. If you have ever had the slightest inkling that you could do the job as well as your boss, or with a different approach, then again you are thinking in management mode, and subconsciously preparing for management.

What about previous incarnations? I was reminded of some previous experience I had for a period of twelve months or so, when I was the Assistant Service Manager at a garage. I knew very little about the mechanics of cars, and even less about car mechanics. However I found that giving the mechanics a chance to tell me about their problems and difficulties in their work was the first step in gaining their confidence. They certainly didn't want me to tell them how to change wheel bearings, (although in fact I did learn), but rather they wanted to feel looked after, to be managed. This was all good management experience.

Can you manage your personal budget? If you can't, then you know all the pitfalls and messes one can get into. When managing the library budget, you will find you are a

paragon of financial rectitude, because you won't make the same mistakes when it is public and your reputation is at stake.

It is not, however, always all plain cataloguing, and we have to learn and adjust as we go along. Problems can arise in organising our own time effectively. We may have got used to a settled routine where day-to-day and more important decisions have been taken for us. Suddenly we have to choose a piece of equipment, and be ready to justify that choice and the cost. Or what about the member of staff who you always thought wasn't quite pulling his weight, or always seemed to be bunking off a few minutes early? Now it's your problem, and you who will get irritated by something that previously was not your responsibility. In short, I think we are all management material, even if we have doubts about our current skills, because as I have said we always have more skills than we actually think.

We need to know our resources: money, equipment, IT, as well as books

Theoretically, we Librarians ought to be very good managers of resources, because our skills are supposed to be in organisation of knowledge. If we have the skills to organise knowledge successfully then we should have the skills to organise our resources.

Your predecessor, if there was one, should have left some indication of the budget, and your Accounts Department should be able to let you know how much of it has been spent. Spend time really getting to grips with the financials, and go through the monthly library expenditure to understand the pattern over the previous year.

A long session with the IT Manager, if there is one, is also vital, to get a feel of what there is available, and what might be in the planning stage. The library should be involved as much as possible in all IT developments. You need to know if Novell is going to be replaced by Microsoft NT, as some specialised CDs or specialised library software may not run on one or the other. Does the managing director have a grandiose plan for an intranet? These are the sorts of issues you should develop a feeling for. Try to find out in advance, rather than have something sprung on you. Make friends with the IT Department, and keep asking them what is on the agenda.

Spend some time actually getting to know what is in every drawer and cupboard in the library: it is surprising what turns up.

A library policy

Once physical resources and the financial side have been established, it is time to work out a library strategy or policy document. The library policy can be your "rock and defence". It will give you a framework within which to work, and which has been agreed at an appropriate level within your organisation. It can deflect criticisms from accountants. It can justify new expenditure on resources.

It allows you to say "We will willingly do this, but we cannot do that at the moment..... It means you have a chance not to be worked into the ground. If you can agree the library policy with the Managing Partner, or Senior Partner, or Director of Administration, or the library Partner or whoever is appropriate, then you have that to

fall back on if anybody starts challenging what you are doing. You know what you want to do and what is required of you and this has been agreed at the highest level.

I found the best way to go about this was literally to start with a blank sheet of paper and try and have a thorough think through of what was the library is for.

- What should its role in the firm be?
- How can the library best provide for fee-earners requirements?
- Do they actually know what their requirements are, or do they think of your unit merely as a place where books are "stored"?
- Were partners interested in a handsome and immaculately tidy library which was entirely reactive, or were they more interested in a library which was proactive, absolutely on the ball, could anticipate and react to changing circumstances very quickly and indeed could work at fast speed to provide the information they instantly required.
- Would they mind if labels on pamphlet boxes were at times hand written rather than printed, if formal memos were abandoned in favour of E-Mails etc. etc.?

The answers are very much to do with corporate culture

Consultation

To find my answers, I had to invest a large amount of time and footwork in getting round as many of the library users in the firm as possible. I had very many short conversations with as many people as possible, and attended Departmental meetings to get a flavour of what they wanted. Sending a survey round is not an adequate substitute. People do not tell surveys what they really think. People will not tell you what they find irritating if asked that question on paper, but I find will let this out more readily face to face.

This whole process took about three months. Every user had a different view of what the library could and should do. Inevitably there were conflicts of ideas, but eventually a broad consensus emerged. From your understanding of the budget you will have gained an idea of what resources are currently available.

Having consulted as widely as possible, you should be in a position to reconcile what you want the library to be, what the users requirements are, and the resources available. This is the basic information for writing a policy document.

There is always a temptation when writing a library policy document to assert yourself as a dynamic whirlwind, turning everything upside down and driving through a library Plan which is innovative, leading edge, full of IT and so on. Another temptation might be just to leave things as they are and be thankful that you have got a new job and a higher salary.

Resist these temptations, but be tactful, and tread carefully at first. Write a draft policy consulting and involving your boss as much as is feasible. As mentioned above, once you have such a policy, you know and senior management knows and agrees where you are taking the library.

Developing or building the library's profile

We must also bear in mind the library's profile

It may be stating the obvious, but it is vital that all staff do know that there is a library. Developing the library's profile is easier to do at the beginning when you are making changes and selling these changes to fee-earners.

There are many ways and means of doing this, from holding a "Get to know the library" party, to sending out a well-produced single sheet "Guide to the library's Information Sources". A weekly library bulletin of some sort is essential as a means of developing and maintaining the library profile.

Another technique is to introduce a new service, or re advertise an existing service every three months or so. This keeps up the users' awareness that the library is not static and complacent, but in touch with current developments and information innovation. Once things have got going one can fall into the trap of complacency. You need to keep up the profile of the library because when it comes to budgets and resources, it is vital that the library has a high profile.

Recruitment and staff management

I was both lucky and unlucky in that when I started as Librarian, I needed to recruit staff. Unlucky, because some experience was being lost, and lucky in that I could choose my own staff.

In recruiting, I found that it was not always the person who on paper had the best qualifications who was going to fit in as part of a team. More, the question is whether that person will get on with you and vice versa. I ought to know from my own CV that one always over-estimates whether consciously or otherwise, one's experience and abilities, and it is remarkable how those with "experience of LEXIS" have only used it three times in their lives. But that doesn't matter, so long as they have the ability to learn and you have the realism not to assume that everybody can do what you can do from their first day in the unit.

What I have learnt is that there is only one piece of American management philosophy which is always true, and that is that if something works, don't try to mend it. If a member of staff has devised a method of journal circulation that works, even if the system seems rickety, leave things alone. Obviously, you have got to make sure that the system is working properly, but if it does, then my philosophy is to keep one's hands off it and let whoever is doing it have the responsibility for it. That means don't interfere too much: but you must keep your eyes and ears open as to the happiness of your staff.

Conclusion

Don't be afraid to manage. Consult as many users as possible as soon as possible, and then set down your strategy for the library, based on what you think it should do, what the users expect, and what you think your users ought expect and have. We should always remember that we have a huge role to play as teachers: we can get people out

of information ruts, and into the information highway. We have a duty to the organisation not to hide our assets, but to share them with all members of staff. We should communicate to everyone our excitement in finding information. This way the library will come to be recognised as a highly valued asset in your organisation.