


**8Rs REDUX
CARL LIBRARIES HUMAN RESOURCES STUDY
10 YEARS LATER . . .**

By
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INTRODUCTION



What are the 8Rs?

retirement, recruitment, retention, remuneration, repatriation, rejuvenation, reaccreditation, and restructuring

Why replicate 8Rs study now?

- Measure change and identify emerging issues
 - Effects of lingering 2008 recession and global economy, retirements, information technology, diverse stakeholder body

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RESEARCH QUESTIONS

Recruitment

- Is recruitment among CARL libraries still characterized by relatively few difficulties?
- Have members of designated groups increased their representation among CARL staff?

Retirements

- To what extent have predicted retirements been realized?
- What are the barriers, if any, to replacing retired librarians?
- What does the future hold for retirement?

Role Change: A new R?

- To what extent have paraprofessionals / other professionals taken on roles that were traditionally the realm of professionals?
- To what extent has the demand for librarians to perform specialized, information technology, research, and leadership / management roles changed in the past 10 years and how well is demand being met?

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RESEARCH METHODS

Same methods as in 2003 / 2004

- Institutional Survey (2003)
- Practitioner Survey (2004)

Different methods in 2013 / 2014

- Institutional Survey conducted in 2013 and split into:
 1. Pen and Paper
 2. Web Survey
- Practitioner Survey conducted in 2014 using library listservs and population of interest all permanent staff
- Both survey instruments reviewed and revised, removed, or added to by balancing interest in comparing 2003 / 2004 to 2013 / 2014 with improving measures and reducing respondent burden

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RESPONSE RATES

CARL Institutional Surveys Response Rates by Region

Region	Total CARL Institutions ¹		Staffing Complement ²		Web Survey ³	
	N	N	Response Rate	N	Response Rate	
Canada	28	26	93%	24	86%	
West	0	0	100%	6	75%	
Ontario	12	11	92%	9	75%	
Quebec	6	4	67%	4	67%	
Maritimes	3	3	100%	3	100%	

¹ Excludes two national libraries (LAC and CIB11) that were not able to participate. These two libraries which participated in the 2003 study were removed from the 2003 data and are henceforth excluded from all calculations and analyses.
² Includes partial response for 1 library.
³ Includes partial responses for 2 libraries that also did not include region.

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RESPONSE RATES

CARL Practitioner Response Rates by Staff Type

	Response	Population Parameters ¹	Response Rate
Total	837	3564	24%
Librarians	402	1110	36%
Other Professionals	62	300	21%
Total Support Staff	373	2154	17%
Paraprofessionals	301	908	33%
Other Support Staff	72	1246	6%

¹ Population parameters are from the Staffing Complement portion of the 2013 Institutional Survey

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RESPONSE RATES

Librarian Response Rates By Region
(n=333¹)



Source: BR 2014 Practitioner Survey
¹ Excludes 57 cases for which region is not known.

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RECRUITMENT

- CARL Libraries recruited 362 new librarian staff members in the past 5 years.
- Original 8Rs revealed relatively few concerns around recruiting for CARL libraries.
- What are recruitment issues in 2013, if any?

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RECRUITMENT

Recruitment Ability by Survey Year
(2013 n=22; 2003 n=25)

Recruitment Ability	Percent Libraries	
	2013	2003
Good / excellent current ability to recruit qualified librarians ¹	82	92
Easier / same ability to recruit now compared to 5 years ago ²	77	80
Same / more qualified librarian applicants compared to 5 years ago ³	86	96

¹ Sources: BR 2013 and 2003 Institutional Surveys
² Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Poor" and '5' meaning "Excellent" to the question: "How would you rate your current ability to recruit qualified librarians?"
³ Based on responses of 1, 2, and 3 on a 5-point scale with '1' meaning "Much easier" and '5' meaning "Much more difficult" to the question: "How would you rate your organization's ability to recruit qualified librarians compared to 5 years ago?"
⁴ Based on responses of 3, 4, and 5 on a 5-point scale with '1' meaning "Much less qualified" and '5' meaning "Much more qualified" to the question: "How would you rate the general qualifications of applicants for librarian positions compared to 5 years ago?"

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RECRUITMENT

Recruitment Barriers by Survey Year
(2013 n=22; 2003 n=25)

Barrier	Percent Libraries Reporting a Barrier to a Moderate / Great Extent ¹	
	2013	2003
Budget restraints	77	64
Inadequate pool of qualified candidates	55	30
Inadequate pool of interested candidates	50	42
Hiring freeze / limited hiring policy	45	24
Competition from other Canadian library sectors	45	29
Need to hire bilingual staff	9	16

¹Sources: BRS 2013 and 2003 Institutional Surveys
²Based on responses of 3, 4, or 5 on a 5-point scale with '1' meaning 'Not at all' and '5' meaning 'To a great extent' to the question: "To what extent do the following issues prevent you from hiring qualified librarians?"

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RETIREMENT

- CARL lost 16% of librarian workforce due to retirements between 1997 and 2002 and another 30% between 2003 and 2013

Librarian Retirements in Past 10 Years
(n=24)

Total Retirements between 2003 and 2013	330
Retirement rate (based on 1,092 librarians in 2003)	30%
Average # retirements per library	14
Range of # retirements per library	3 to 47
Retirement Replacements	
Positions replaced with internal candidate	25%
Positions replaced with external candidate	49%
Positions not replaced	27%

Source: BRS 2013 Institutional Survey

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RETIREMENT

Succession Planning Practices

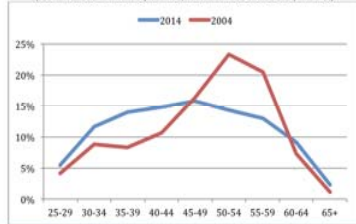
Formal succession-planning strategy	Percent Libraries ¹
Elements of Succession Planning Strategy	17
Opportunities to keep librarians challenged and involved	92
Training to prepare librarians for more responsible positions	88
Identification of the key areas in library that require development	83
Strategic plan that informs future human resource needs	75
Identification of key people to groom/develop for future managers/leaders	58
Identification of desirable characteristics of managers and leaders	54
Mentoring to prepare librarians for more responsible positions	50
Regular review of adequacy of current librarians in meeting HR needs	42
Customized career path based on librarian unique talents and abilities	38
Process for transferring senior librarian knowledge to mid-level librarians	21

Source: BRS 2013 Institutional Web Survey
¹Based on "Yes" responses to the question "Does your organization practice any of the following?"

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FUTURE RETIREMENT

Age Distribution of Librarians by Survey Year
(2014 Practitioner Survey n=317; 2004 Practitioner Survey n=456)



Sources: BRs 2014 and 2004 Practitioner Surveys

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STAFFING COMPLEMENT CHANGE

2003 to 2013 Change¹ in Professional and Paraprofessional Staff

	Professionals & Paraprofessionals			
	All Staff	Total	Librarians	Other Professionals
2003 (FTE)	4,716	1,954	1,092	172
2013 (FTE)	4,365	2,167	1,125	295
Change (FTE)	-351	213	33	123
Change (%)	-7%	11%	3%	72%

Sources: BRs 2013 and 2003 Institutional Surveys
¹ To improve across time comparability, in a very few instances, CARL official statistics (Table 8) are used when BRs data are missing.

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STAFFING COMPLEMENT CHANGE

Distribution of Type of Other Professional (n=295)

Type of Other Professional	Percent
Information Technology Professionals	21
General Staff Supervisors	12
Archivists	13
Student Success Professionals	7
Business / Finance Professionals	7
Human Resource Professionals	5
Facilities Professionals	4
Communications Professionals	4
Development (fundraising) Professionals	4
Copyright Specialists	3
Statistical / Data Analysts	3
Subject / Content Experts with PhD	3
Museum professionals	1
Other professionals not classified above	1

Source: BRs 2013 Institutional Survey

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LIBRARIAN ROLE CHANGE

Competency Important and Difficult to Fulfill

Competency ¹	Competency Important ¹		Competency Difficult to Fulfill ²	
	2013	2003	2013	2003
Technology skills	95	92	23	16
Specialist skills ³	77	33	45	71
Research skills	64	n/a	18	n/a
Leadership potential	86	88	38	52
Managerial skills	73	68	36	64
Business skills	27	n/a	36	n/a

¹Sources: BKS 2013 and 2003 Institutional Surveys
²Based on responses of "4" and "5" on a 5-point scale with "1" meaning "not at all important" and "5" meaning "Very important" to the question: "Rate how important the competency is when you are making recruiting decisions about librarians."
³Based on responses of "4" and "5" on a 5-point scale with "1" meaning "Very easy to fulfill" and "5" meaning "Very difficult to fulfill" to the question: "Rate the level of ease or difficulty you have experienced in trying to fulfill these competencies."
⁴In 2003, only libraries indicating specialist skills as important (n=7) were asked extent to which specialist skills were difficult to fulfill.

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LIBRARIAN ROLE CHANGE: SPECIALIST FUNCTIONS

- Public Services: E-Learning/instructional support (4), Research support (3), Liaison(1)
- Collections: Scholarly communication/Digital Scholarship (8), Data management (4), Institutional Repositories (2), GIS (2), Digitization (2)
- Technical Services: Metadata
- Other: Copyright (2), Assessment (2)

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LIBRARIAN ROLE CHANGE: SPECIALIST SKILLS

- How can librarians be required to perform more specialist functions AND a wider variety of tasks?

Librarians Performing More Specialized Versus Wider Variety of Tasks by Survey Year

Statement	Percent Libraries Reporting to a Moderate or Great Extent ⁴	
	2013	2003
The need for librarians to perform more specialized functions has increased in the past 5 years	100	92
The need for librarians to perform more specialized functions will increase over the next 5 years	95	96
The need for librarians to perform a wider variety of tasks has increased in the past 5 years	100	100
The need for librarians to perform a wider variety of tasks will increase over the next 5 years	95	100

⁴Sources: BKS 2013 and 2003 Institutional Surveys
 Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 "to a great extent."

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LIBRARIAN ROLE CHANGE: RESEARCH SKILLS

Librarian Interest and Participation in Conducting Research by Career Stage
(n= 400)

	Percent Librarians Agreeing ¹			
	Total	Career Stage ²		
		Recent Librarians	Mid-Career Librarians	Senior Librarians
Important to have a job that allows me to Conduct Research	52	65	49	49
Job allows me to Conduct Research	47	44	46	46
Important to have a job that allows me to Publish Research	45	58	50	50
Job allows me to Publish Research	41	31	42	42
Important to have a job that eligible for Research Leaves	57	58	53	53
Job allows me to take Research Leaves	58	31	69	69

¹Source: 88s 2014 Practitioner Survey
²Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree" to the question: "To what extent do you agree / disagree with the following statements about what is important to you in a job and whether that element is part of your library job?"
³Allocation to career stage is based on year graduated from the MLIS program with Recent Librarians graduating after 2008, Mid-career Librarians graduating between 1990 and 2008, and Senior Librarians graduating before 1990.

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LIBRARIAN ROLE CHANGE: RESEARCH SKILLS

Librarian Participation in Specific Research-Related Tasks by Career Stage

	Percent Librarians Performing Task at Least Sometimes ¹			
	Total	Career Stage		
		Recent Librarians	Mid-Career Librarians	Senior Librarians
Research-Related Tasks Total	42	36	45	41
Conducting literature reviews	53	49	55	52
Analyzing data	48	47	49	48
Presenting research results	46	43	48	44
Conducting quantitative or qualitative research	44	29	47	40
Writing research proposals	38	30	40	40
Publishing results of research	38	23	47	42
Developing methodology for a research program	31	32	34	23

¹Source: 88s 2014 Practitioner Survey
²Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "never" and 5 meaning "frequently" to the question: "How often do you perform each of the following job functions?"

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LIBRARIAN ROLE CHANGE: RESEARCH SKILLS

Perceived Barriers to Conducting Research Among Librarians¹ By Career Stage
(n=391)

Barrier to Conducting Research	Percent Librarians Reporting to a Moderate or Great Extent ²			
	Total	Career Stage ³		
		Recent Librarians	Mid-Career Librarians	Senior Librarians
Lack of time	89	89	89	85
Lack of financial support	58	65	60	47
Lack of mentorship support	53	56	57	40
Lack of confidence in research skills	52	48	54	49
Lack of research skills	46	43	46	45
Lack of recognition for conducting research	40	46	42	30
Lack of interest	40	26	41	49

¹Source: 88s 2014 Practitioner Survey
²Based on responses of 3, 4, and 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent" to the question: "To what extent do you the following prevent you from conducting research?"
³Allocation to career stage is based on year graduated from the MLIS program with Recent Librarians graduating after 2008, Mid-career Librarians graduating between 1990 and 2008, and Senior Librarians graduating before 1990.

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LIBRARIAN ROLE CHANGE: LEADERSHIP, MANAGEMENT & BUSINESS ROLES

- 48% librarians in management positions

Increased Demand for Leadership, Management and Business Functions by Survey Year

	Percent Librarians Reporting to a Moderate or Great Extent ¹	
	2013	2003
The need for librarians to perform leadership roles has increased in the past 5 years	86	100
The need for librarians to perform leadership roles will increase over the next 5 years	95	100
The need for librarians to perform managerial functions has increased in the past 5 years	95	100
The need for librarians to perform managerial functions will increase over the next 5 years	82	96
The need for librarians to perform business functions has increased in the past 5 years	67	n/a
The need for librarians to perform business functions will increase over the next 5 years	57	n/a

¹Sources: BRK 2013 and 2003 Institutional Surveys
²Based on responses of 3, 4, or 5 on a 5-point scale with 1 meaning "to no extent" and 5 meaning "to a great extent."

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LIBRARIAN ROLE CHANGE: LEADERSHIP, MANAGEMENT, & BUSINESS ROLES

Librarian Interest and Participation in Leadership, Management, and Business Roles by Survey Year

	Percent Librarians Agreeing ¹	
	2013	2003
Important to have a job that allows me to Perform a Leadership Role	61	59
My job allows me to Perform a Leadership Role	54	59
Important to have a job that allows me to Motivate Others	57	59
My job allows me to Motivate Others	56	59
Important to have a job that allows me to Manage a Service/Department	41	34
My job allows me to Manage a Service / Department	42	34
Important to have a job that allows me to Supervise Others	35	32
My job allows me to Supervise Others	48	32
Important to have a job that allows me to use my Business Skills	32	n/a
My job allows me to use my Business Skills	32	n/a

¹Sources: BRK 2013 and 2003 Practitioner Surveys

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CAREER ADVANCEMENT

Librarian Attitudes Towards Career Advancement by Career Stage¹

	Percent Agreeing ¹			
	All Librarians	Recent Graduates	Mid-Career Librarians	Senior Librarians
Important to have job that allows career advancement	51	49	52	51
Interested in moving into a position with more responsibility	42	59	43	25
Happy to spend the rest of career in current position	45	34	36	73
Qualified to move into a higher position	54	51	53	61
Opportunities provided for career advancement	93	91	97	91

¹Source: BRK Practitioner Survey
²Allocation to career stage is based on year graduated from the MLIS program with Recent Librarian Entants graduating after 2008, Mid-career Librarians graduating between 1990 and 2008, and Senior Librarians graduating before 1990.
³Based on responses of 4 and 5 on a 5-point scale with 1 meaning "strongly disagree" and 5 meaning "strongly agree."

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SUMMARY OF MAJOR FINDINGS

- Recruitment of new librarians has offset retirements and flattened age distribution
- Retirements occurring at predicted rate and without great deal of difficulty replacing / restructuring
- Biggest shift in librarian roles:
 - Pre 2003: Management & leadership roles; although still important in 2013
 - Post 2003: Specialist roles continue in importance

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NEXT STEPS . . .

- June / July: Finish analysis
- August: Complete major report of findings for CARL including Strategic Human Resource Planning Implications
- September: Complete abbreviated report for wider distribution

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