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TWO X’ERS TELL WHY AND HOW: SUCCESSION PLANNING FOR THE FUTURE

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TWO X’ERS TELL WHY AND HOW:
SUCCESSION PLANNING FOR THE FUTURE

A number of reports within the international library and information sector are highlighting the need for succession planning within this sector, particularly in response to the disproportionate numbers of librarians expected to retire within the next twenty years. There is a call for organisations to understand the new generation that is currently entering the workforce - Generation Y. The library and information sector can draw from the current research into generation theory to review their organisation’s strategies to attract and retain this new workforce. Current human resources and management literature examines the different styles of work and underlying behaviours of the different generations. This paper will focus specifically of the attributes of Generation Y and Generation X in relation to professional development, and retention of talent within an organisation. In particular the case for job share at management level is reviewed in relation to how it suits these generations and how it can be used as a strategy in succession planning. The authors will also share their personal experiences of job share at management level.

An Ageing workforce

It is predicted that the international library workforce is about to enter a period colloquially known as the “brain drain” - a time when the impact of an ageing workforce will begin to take effect within the library and information sector. An Australian Labour Force Survey in 2005\(^1\) revealed that the median age of librarians in the workforce is 48, with 65% of Australian librarians over 45, compared to the national average of 35% for all occupations. Only 32.2% are aged between 25-44 followed by a small 2.7% under 24 years of age. Refer to Table 1.
Similar demographic patterns have been observed in the US, Canada, the UK and NZ. In the US 24% of librarians in the US workforce will retire between 2005-2010 and a further 27% between 2010 and 2020. Encel’s 2003 report on the mature workforce notes that Australia has developed a culture of “early exit”, voluntary or otherwise, with some superannuation schemes, creating a financial incentive for people to leave full-time work at 55. Surveys indicate that over 75% of males and around 95% of females intend to retire from full-time work before reaching age 65 and over 50% of women indicate that they intend to retire from full-time work before age 45. However Encel notes that given financial considerations “the realism of these intentions, both at the level of the individual and from the perspective of the broader community, is open to significant doubt”.

Within twenty years it is predicted that over half of the current librarian professionals will...
have left the workforce and finding replacements for these positions will have become increasingly difficult. In Australian libraries only 11.4% of librarians are under 35 years of age whereas the number of workers in other occupations under 35 is 40.4%.\(^1\) In addition, the number of graduates in the Australian library and information sector has stagnated and in the case of undergraduates has decreased by 54% since 1997.\(^5\) In the US the total number of MLIS graduates has also been described as ‘stagnant’. Whilst in Canada, which has recently recorded an increase in numbers of students enrolling, 45% of the students enrolled were over 35 years of age.\(^3\)

Australia has also reported a skills shortage with the number of positions available exceeding the number of applicants. Avril Henry, an HR consultant who has surveyed Generation Y extensively, refers to the current situation in Australia as an “employees market”, or from the employers perspective a “war for talent”, as candidates can pick and choose from a range of positions.\(^6,7\) The library sector is competing within this arena and is further hindered by its small pool of talent. In addition to this, the new graduates’ information skills are transferable to a range of industries (records management, IT), consequently the library sector needs to re-examine its recruitment policies, and revamp its image in order to attract these new graduates into the industry.

Examining the attributes of this new group highlights a whole range of issues that need to be considered in succession plans for the library and information sector. Instead of looking at who will replace those leaving the profession, we should be looking at who will be succeeding them.
What is succession planning, and why bother?

Succession planning is defined as “a deliberate and systematic effort by an organisation to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement”.  

Succession planning should be a proactive process rather than a reactive response. It goes beyond replacement planning and instead attempts to ensure the continuity of leadership by cultivating talent from within the organization through planned development activities. Rothwell delineates between managerial succession planning and technical succession planning, with the latter focussing on retaining organisational knowledge and expertise through knowledge management. 

A comprehensive succession plan provides strategies to ensure business continuity including: the retention of organisational knowledge; the replacement of future vacancies; a way to meet future skill and talent needs; competitiveness as an employer and increases its ability to attract and retain talented staff.

The Librarians of the Australian Technology Network group (LATN) – an Australian and New Zealand Technology Universities group, recently contracted Whitmell & Associates to develop a workforce succession plan to consider how they can best prepare their workforce and be competitive in the hiring market. The report presented seven key recommendations for organisational succession and workforce planning:

1. Develop a written plan
2. Change recruitment, hiring and retention practices (reduce hierarchies, provide career
paths and opportunities for multiskilling including job rotation or job swap)

3. Recognise good work and abilities

4. Encourage professional development and higher education

5. Develop leaders and managers, through mentoring programs for example

6. Work with the Library information education sector

7. Work with other libraries within the industry

The Australian Library and Information Association (ALIA), Queensland University of Technology (QUT) and CAVAL Collaborative Solutions are currently undertaking a major collaborative research project to examine the library and information services workforce in Australia: the neXus census. Two of the key goals of the project are to foster a deeper understanding and awareness of the importance of workforce planning and to develop a collaborative framework for career long learning for the library profession, bringing together employers, educators, trainers and individual practitioners.

Who is succeeding?

Human resources and management literature has been examining four generations currently believed to be coexisting in the workforce. Each of these generations has particular working styles and characteristics. See Table 2. This paper recognises that not every person born within these generations demonstrate all of their supposed attributes. However, generational theorists such as Howe and Strauss agree that these characteristics are useful in providing a general description of the generations. This is helpful when understanding the needs, wants and motivating behaviours of the generations. As an industry we need to pay attention to generational issues and intergenerational interactions.
in the workplace.

Rachel Singer Gordon notes “as a library manager part of your responsibility toward your staff is to bring out their best and respect their individual needs. Paying attention to generational concerns is just one facet of being a good manager, paying attention to generational trends that affect your institution is just one part of securing your library’s future”. 12, (p181)

A comprehensive coverage of the attributes of the four main generations, and the rationale behind them, is outside the scope of this paper. Books and papers, such as Sheahan’s ‘Generation Y: thriving (and surviving) with Generation Y at work’ and Huntley’s ‘The world according to Y: inside the new adult generation’, 13, 14 provide a comprehensive analysis of the causes of these behaviours. Henry states “each generation has its own distinct set of values, views of family, work/life balance, career, training and development, loyalty, and expectations of leaders and the work environment”. 6

This paper will specifically focus on the new generation coming into the workforce Generation Y. They are also known as Gen Y’ers; Generation whY; Gen Y; Ultra Gen X; Millenials; Nexters; Generation next; Echo Boomers; Boomlets; the I Generation; the Net Generation; and Netizens. As two Generation X managers we, the authors, will also be examining how an understanding of Boomers, Generation X, and Generation Y can help an organisation in recruiting and retaining staff and developing leaders within the organisation.
Don’t just focus just on Generation Y.

Although current numbers of Gen Y’ers in the library and information workforce are low this generation cannot be ignored. The literature is consistent in the recognition that core Generation Y traits are different to any other generation in the workforce. A better understanding of these traits will help us understand their behaviour, rather than rejecting it or ignoring it. Zemke, Raines & Kilpatrick in “Generations at work: managing the clash of Veterans, Boomers, Xers and Nexters in your workplace” examines how each of the generations interact with each other and specifically looks at the type of clashes or misconceptions that occur between the generations. In recognising these interactions a learning organisation can maximise the effectiveness of these intergenerational relationships. For example Gen Y’ers respect the Veterans and Boomers, consequently there is the potential for a mentoring relationship by these two groups in which the Boomers and Veterans can pass on the organisational history and their own experiences. In return the Gen Y’ers can share their technological expertise and inject their creativity to brainstorming and organisational planning. Y’ers can also be useful sharing their technical confidence and ability with youth to youth or peer to peer IT skills training. As Boomers prepare to exit the workforce (often through contract work after retirement) they too can share their skills and knowledge such as through project work. Encel’s report on the mature workforce recommends that organisations and government develop policies that engage and encourage Boomers to continue in the workforce.
Table 2. Comparison of attributes of current workforce generations. (Adapted from Eisner, Henry, Sheahan & Zemke\textsuperscript{6, 7, 13, 15, 16})

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<td>Grew up in war time</td>
<td>Largest generation in the workforce. Grew up post World war II</td>
<td>Known as ‘latchkey kids’</td>
<td>Told they “Can do anything”; optimistic, confident, sociable; strong morals and ethics; conservative</td>
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| Characteristics in workplace | Disciplined; they respect law and order | Open minded and rebellious in their youth, more conservative in their 30s - 40s | Resourceful; individualistic; self reliant; sceptical of authority; hardworking, enthusiastic; excited by challenges | Expect greater workplace flexibility; creative; enjoy brainstorming, thrive on challenges |

| Work needs | Loyal; self-sacrificing | Optimistic; ambitious; loyal; workaholics, known as ‘superwoman’; driven to succeed | Focus on relationships (at home and work) and outcomes, their rights and skills in the workplace | Need a positive work environment; a competent inspiring manager and a work/life balance |

| Respect | Directive, command management style; they respect positional power | Crave job status; status symbols are important | Are not interested in long term careers, and not into corporate loyalty or status | Like an inclusive style of management; involved in their career plan; value honesty |
Introducing the Next generation: Generation Y.

It was initially viewed that Gen Y was “Gen X on steroids”. Before writing this paper we were also under the misconception that Generation Y’s attitudes to work and life were the same as ours (Generation X). In our readings and experience as managers we have now come to realize that we were wrong in our assumptions. As Huntley, a fellow self-confessed Gen X’er, observes “despite a few similarities in behaviour and attitudes, Gen Y actually represents a sharp break from Generation X. Instead of imitating us, Y’ers have reacted to our moods and our failings.” 14 (p5)

In an Australian 2005 survey of Generation Y workers, Henry recorded their top three values as loyalty, honesty, and trust. 16 They are specifically loyal to their team (home or work) and to a good manager, not necessarily their organisation. They also expect these values to be reciprocated by those around them. The same survey found that Generation Y’ers rated the following as the most important factors in terms of careers:

<table>
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<th>Work styles</th>
<th>Fixed views on roles; inform other on a need-to-know basis. Lead by hierarchy.</th>
<th>Good technical skills; may micro manage others; were not formally trained in leadership skills. Lead by consensus.</th>
<th>Comfortable with technology; easy to recruit - hard to retain; will have at least 3 careers in their lifetime; will self educate for leadership skills (MBA) if necessary. Lead by competence.</th>
<th>Grew up with technology (live and breathe it); expect to make decisions and be involved in decision making; will have up to 25 different jobs in their lifetime. Lead by cooperation.</th>
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<td>Orientation to change</td>
<td>Not comfortable with change</td>
<td>Resist change, are loyal to the old ways</td>
<td>Accept change</td>
<td>Want/expect change</td>
</tr>
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*Exact dates vary amongst different theorist.
1. Positive work environment
2. Working for a good manager/supervisor
3. Having a work/life balance
4. Access to training and development

Generation Y workers are motivated by: a good manager whom they respect and look to for guidance; recognition for a job well done; a need to feel valued by the organisation; having a job with purpose and meaning (client satisfaction); challenges and responsibility.

Gordon reports that job fulfillment is fundamental to this group. Gen Y’ers are unwilling to stay in less than satisfactory conditions as they are transient and are continually scoping the job market for ‘the best job’. They view their employer as a hub of new resources or opportunities for themselves, and will not stay if they feel that they are not getting enough from a job.

Other work/lifestyle conditions considered important by Generation Y, as reported by Sheahan, are: flexible work arrangements (this does not necessarily mean working part time); promotional /career progression opportunities; considerable remuneration; integrity (no empty promises); corporate social responsibility, morals and ethics and a social or fun workplace.

What is the most effective way to bring out the best in Generation Y?
Armed with the knowledge of what generation Y needs in the workplace, their managers/supervisors can use the following to produce a work environment that is attractive and responsive to the new generation.\textsuperscript{13,16}

**Trust them.**

Trust them to work in the way that suits them best, such as in a loud talkative team environment, or working from home. Don’t be afraid to challenge them or give them opportunities to perform at higher than expected levels. Demonstrate fairness in how you treat them, and how they see you treating others.

**Empower them.**

Generation Y respond well to personal plans, which gives them a job purpose. They expect to be involved in decisions across the organisation, and have their feedback recognized and valued. Generation Y are confident in their abilities and therefore can be assertive, ambitious, and expect instant gratification. Their manager needs to be able to harness their ideas, without discouraging them. For example, they may expect the latest technology in the office. The manager could redirect their enthusiasm to sharing their expertise with others (e.g. technology training, peer to peer) and deal with any unrealistic expectations through articulation of the organisation’s strategic focus. Gen Y may lack direction and focus. However they cope well under pressure and respond to deadlines and short term goals. Finally, giving Gen Y accountability will help keep them focused and also feel valued.
Communicate with them.

Generation Y are sometimes referred to as the “whY generation”, as they are not afraid to openly question the rationale of a policy or decision or direction - be it from their peers, supervisors or managers. They will respond well to forums that involve them in all levels of strategic discussion and planning. Communication needs to be immediate and open. They respond well to personal communication including one - on - one, face to face and team meetings. They need to hear and share others opinions and they will respect a manager who develops a personal connection with them.

Train and develop them.

Because of their informal tendencies, Generation Y will benefit from business skills development, such as public speaking, business writing, business etiquette, conflict resolution, time management skills, negotiation skills and relationship building. They need to recognise the value of history and tradition. However, they are very open to coaching and mentoring, rather than a directive style. They value a supportive, inspirational role model with vision, who leads by example.

Gen Y’ers are independent in thought and confident enough to express it, but at the same time enjoy the security (both emotional and financial) that comes with living with their parents, or that comes from belonging to an organisation. This “independent dependence” means that in the workplace they are coachable and desire empowerment. “Emotionally intelligent managers will find Generation Y are tremendous assets to the team and
workplace, as they are willing to develop and improve. Managers with the confidence to empower their Generation Y staff will find them, if managed properly, willing and able to meet the challenge.”

Why develop Generation Y, when they will leave anyway?

The question at this point arises that perhaps an organisation is wasting its time on developing these individuals, especially if they are not going to stay and repay the investment. There are five facts that cannot be ignored.

- Their potential is great, they are receptive to change and development. A smart organisation will know how to harness Gen Y’ers energy and promote their development.
- Addressing their (Gen Y’ers) motivating behaviours will help attract and retain them in our industry. This is important in boosting the number of new graduates in the library and information sector.
- An understanding of their strengths and weaknesses, like and dislikes, will help when developing and managing intergenerational workgroups.
- If and when they leave, they will promote you to their peers (via word of mouth)
- They are the future of our organisations. They cannot be ignored.

Skills needed by a Manager of Generation Y.

In order to facilitate the development of the Generation Y worker, a future manager needs to develop their own skills in: listening; responding to being questioned and challenged; giving and receiving feedback; emotional intelligence and an ability to recognise the
Generation Y’ers mood cycles; managing Generation Y’s high expectations; personal involvement and interest in their staffs’ career development; mentoring and coaching; creative leadership; and up-to-date technology skills. 7,13,17

Generation X as managers.

Generation X have received their fair share of criticism. We have been described as the slack generation and have sometimes been referred to as cynical and self centered. Eisner describes Generation X managers as lacking in social skills and reluctant to network. 16 These skills will need to be developed in order to communicate effectively with Generation Y. However we are also flexible, technologically savvy and resourceful. Although different to Generation Y, Generation X share some similar approaches and may act as a bridge between the boomers and Generation Y. As Hutley notes “Generation X could hold the key to the survival of our profession as this group may have the insights into Generation Y to recruit enough new librarians from this age range to fill the void created by Boomers retirements”. 18 (p4)

What the library and information sector needs to do:

Job fulfillment and work/life balance is very important to Generation Y workers. This group is more likely to change jobs than any other generation in the workforce. Henry 6, predicts Generation Y’ers will have up to 29 different employers within their career span. “Information skills are in demand and transferable, if traditional libraries are to keep younger workers, they need to find a way to remain attractive in the face of non traditional opportunities” 12 (p2)
To address this, library and information organisations need to consider the following in their succession planning: 7,13

- Provide opportunities for Generation Y’ers to express and share ideas, to enable them to feel valued (via open forums and staff meetings).
- Flexibility, for example job swap, rotation, part time, or sabbaticals.
- Remuneration based on accountability and responsibility, rather than seniority, or time in the organisation.
- Articulate the strategic direction and expectations of the organisation.
- Provide personal and professional education and training (not just basic skills) and make it relevant, interactive and with their peers.
- Review their expectations regularly and focus on their aptitude and ability not their demonstrated skills (ignore the corporate ladder approach, Y’ers don’t have time).
- Provide a career path.
- Develop and demonstrate a social conscience or corporate responsibility (to recruit and retain).
- Be sincere, modern, edgy, passionate, and optimistic.
- Become a learning organisation. At their exit interview ask if they have any good ideas before they go and if they would refer the company to a friend? And also ask if they know anyone who wants the job?
- Address Generation Y’s needs in your advertising and illustrate that you provide support and training.
- Make sure your technology is up-to-date including information on your websites.
• Have a brand strategy to help with recruitment.

The library and information sector can also employ strategies to attract this generation’s loyalty to the profession:

• Reach out to library and information studies schools, and start building relationships before they graduate.

• Offer internships.

• Revamp the industry image.

Kate Davis, a self titled “Millennial Librarian”, recently presented a paper at the Australian New Librarians Symposium (NSL2006) on the work profile of Generation Y and its implications for the library workforce. Like Sheahan’s work, this paper is written from the perspective of a Generation Y’er and offers some useful insights into their perspective. Davis notes that the library workplace fosters the characteristics that Generation Y staff seek, including diversity, collegiality and flexibility. However she predicts that this Generation will not be attracted to libraries with a hierarchical environment. ¹¹

An example of work/life balance working at Macquarie University Library.

As a result of a recent restructure (2004-2006) Macquarie University Library has already begun to employ the strategies of succession planning. The aim of the change was to create a structure that would simplify and improve services for clients. The restructure was based on six guiding principles that the Library needs to be agile, resilient, informed,
connected, successful and responsible. The focus of the restructure was to contribute to
the development of a flexible organisational structure, create promotional opportunities
across the Library, future proof jobs via a multiskilling approach, and retain the skills and
knowledge of existing staff incorporating best practice standards. There was a focus on
becoming a “thinking and learning organisation”, as well as a doing organisation. 19

The Library’s newly created structure and position descriptions have been developed to
maximise cooperation across library departments, resulting in multiple opportunities for
development. Secondment to project positions within the Library’s newly created Project
Office also offers unique opportunities for individual growth and development. Each
position description now focuses on abilities and responsibilities rather than the previous
task/skill based format.

What follows is a case study of how Macquarie University Library has successfully
employed some of the above-mentioned considerations to the benefit of both the
employee and the organisation. It is the author’s own experience as two Generation X
workers who felt a need to reduce working hours and how management within the
Library has supported the work/life balance need.

A personal case study of job share in practice.

Returning from parental leave, we felt unable to satisfactorily cope with balancing home
commitments and a family with our career. We were both in our thirties, having chosen
like many Generation X’ers to start a family later in life. Together we had twenty-eight
years of library experience, including eight years at Macquarie University Library. Our immediate manager and the University Librarian agreed that we could exchange our individual two full time positions of Academic Outreach Librarians (AOL) to job share the one position of AOL (the equivalent of a faculty librarian position). In doing so the organisation retained the expertise and organisational knowledge that we had acquired. Interestingly, our career choices thus far were not motivated by remuneration, but rather to positions that offered greater job satisfaction and developmental opportunities. This is behaviour typical of both Generations X and Y, “for Generation X women personal fulfilment is intrinsically connected to professional success and that they wanted support from their companies in terms of mentors for guidance and development, opportunities to excel, recognition for efforts, relationships and flexibility to achieve work/life balance.”

After two years of successful job share we applied jointly for an opportunity to act in our managers position for ten months. The Library Management Team were initially concerned at the prospect of job share at management level but agreed, on the condition of a three month trial/probation period. The experience was successful and we went on to job share the position of another department manager for seven months. Finally we were successful in the permanent appointment to our current job share position (Manager, liaison & Research Services). This arrangement has enabled us to remain with the organisation, but more importantly has given us the opportunity to continue our professional development and our career path with Macquarie University.

Flexible work arrangements does not only mean working part time or job share, it also
includes working from home, leave in lieu, variable work hours, job swap, job rotation, or secondments. In response to the increasing demand by Gen X and Gen Y, males and females, for more flexible working conditions and a greater balance with their home and work life, job sharing in management has been much of the focus of recent human resources and management literature. However, most of the literature on job share in management resides in business or retail, with only a few examples of senior job share in the library sector. 

Organisational and personal benefits of job share at management level.

The cost to the organisation for this flexibility is well documented. The organisation has to cover the cost of training and development of two staff instead of one. Conversely, this results in a larger talent pool. There is also the administration and employment duplication, double the demands upon the supervisor/manager of the job sharers and the consequences should one of the partners leave. The success of job share is also dependent upon the individuals involved and their ability to communicate, work as a team and their own flexibility. At a management level there is also the consideration of having two personalities at the helm, and therefore clear communication strategies are essential, both to staff reporting to them and to their line managers.

The benefits to the employer, however, are also to be considered. The obvious one is having the skills of two individuals, two different approaches, and sometimes a more rounded or balanced perspective within one position. “You access the skills of two individuals rather than one, giving greater scope and flexibility. For this to work the
individuals need to share values and agree on common principles, but there is no need to be halves of the same clone…it is the diversity that gives the greatest gains as the extremes of opinion on both sides tend to become more centred”. 22 (p432)

The other benefit for job share is the opportunity for the organisation to retain their assets, valued employees who might have otherwise left in search of part-time work. A 2001 WorkLife report21 revealed that flexible working arrangements could significantly improve performance. Our experience supports these findings. We feel less stressed, and more energetic when at work, compared to our experience when working fulltime. We also believe that we are now more efficient in our work style and our home life has benefited too. However we recognise that there is some duplication in workload, for example reading emails, memos, minutes etc.

The success of our job share experience has been attributed to our complementary work styles. We use our strengths in one partner to develop or mentor the other. For example: Susan’s strengths include manipulating data and budgets; whereas Perri-Lee’s strength is looking at the bigger picture and translating the organisational vision. On some projects, time permitting we will reverse tasks to allow each other’s weaknesses to develop further. We also brainstorm, share ideas and use each other as a “sounding board” creating a very healthy environment with mutual respect and trust. Feedback from our staff and peers have been that they enjoy working with ‘both’ of us and that despite the fact we have different styles of people management it is welcomed not disliked. Staff are also encouraged by how well we communicate the issues to each other without people needing to repeat everything twice.
Conclusion.

Generation Y’s openness to coaching or mentoring, need for a work/life balance, desire to work collaboratively, and attraction to developmental opportunities makes job share a strategy worthy of consideration when planning for succession. Their reported respect for Boomers and Veterans suggest that they will benefit from partnerships with this age group.

Generation Y have needs and wants different to the generations that have gone before them. Developing them with mentoring and encouragement and offering an organisation that is appealing as a whole package will help to attract them to, and retain them within, our profession. Although different to Generation Y, Generation X share some similar approaches and may act as a bridge between the generations. Understanding how they think and behave will enable us to redirect our foci in regards to human resources, organisational change and succession planning for the library and information sector.
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