

The Age Demographics of Librarians and the Organizational Challenge Facing Academic Libraries

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Abstract

The age demographics of the librarian workforce will create organizational challenges for academic libraries. The large baby boomer cohort, which is approaching retirement, needs to be replaced by millennials. There are a relatively small number of librarians in the Gen X cohort and in most cases, they have come late to leadership opportunities. Creating an organization that uses the skills and abilities of all three generations will be challenging and will require attention to both organizational structure and culture. It will also require a purposeful focus on leadership development and the provision of opportunities for people throughout the organization so that all can make significant contributions and can meaningfully influence the work and direction of the library.

Introduction

Academic libraries are, because of the age demographics of the librarian workforce, facing two organizational challenges. Stated most simply, the challenges are:

1. Academic libraries need to exploit new technologies using new service strategies to be effective. They will need to do so with a librarian labor force that consists of a large number of baby boomers; many of whom will remain in the workforce for nearly another decade. At the same time millennium librarians, who will replace the baby boomers, need to be attracted and provided an environment that will allow them to develop and grow, and that will productively use their skills and energy. It will be important that both groups be productive and make contributions, but creating an organization with a structure and culture to do both will be difficult because in many cases aspirations and needs of the two groups will differ and be at cross-purposes.
2. As baby boomer leaders retire, Gen X and millennium leaders will need to replace them. It is unclear if there are a sufficient number of seasoned leaders in these generations. The result could easily be a large number of inexperienced new academic library leaders who will face steep learning curves.

These imperatives, keeping baby boomer librarians productive, providing millennial librarians opportunities to grow and develop, and to find new library leaders can be accomplished, but not

without creatively thinking about organizational structure and attention to the library's culture. This paper will lay out the problems and suggest some possible solutions.

The Characteristics of the Generations

In considering the characteristics of generations, we need to look at what defines the groups based on when they were born and how their experience, both in the world and in libraries, shaped them. All of this will have an impact on their individual goals and aspirations, as well as what they hope for from their workplaces.

Baby Boomer Generation (born 1946 to 1964)

It is useful to recall that baby boomer librarians began their careers, beginning as early as 1970, when catalogs had cards and managing large paper collections and finding answers to even simple questions required expert knowledge. Baby boomer librarians have successfully lived through huge changes in library technology, but in the process, many of the skills and expertise that once defined them as professionals have become less important¹. Throughout their careers, baby boomer librarians have adapted by learning new skills and transitioning to new roles, but the motivation to continue to adapt may diminish as retirement nears. Baby boomers are also likely to be settled in their personal and work lives. The positions they currently occupy are ones they have probably had for some time and are, for most part, the ones they will keep until retirement. In most cases, these librarians will possess a deep understanding of the institutions they serve and are likely to have rich relationships across campus. Because baby boomers entered the profession at a time when higher education was expanding, they often established themselves in leadership positions at what would now be seen as a young age. Combined with the size of this cohort, this has often limited the leadership opportunities for the cohorts that followed.

Characteristics generally attributed to the baby boomer generation, sometimes called the “me” generation, are that they are workaholics with little work-life balance, who value fulfillment and question authority. They tend to be consensual and collegial, communicate in person and favor meetings. Monetary rewards and titles matter to them. Baby boomers can view those who follow them as lazy, disloyal, and unwilling to pay their dues. They have not, in many cases, saved for retirement as they should have², and this may mean having to stay in the workforce longer for financial reasons. This may be particularly true following the 2008 recession. A recent study by Stanley Wilder of ARL librarians documents this trend toward delayed retirement.³ A large scale survey of library workers across academic, public, and school libraries by Eric C. Shoaf and Nathn Flowers paints a similar picture.⁴

Generation X (born 1965 to 1980)

Generation Xers, sometimes called the “latch-key” generation, began entering the library workforce in 1990. Card catalogs were nearly all gone and cataloging was transitioning from a professional to a para-professional responsibility. The internet was being used and the Web

would shortly be invented. CD-ROM databases on stand-alone computers were common. The reference desk was busy and bibliographic instruction was a standard part of public service librarians' jobs. Higher education was no longer expanding and because of the flattening of library organizations and the large baby boomer cohort, Gen X librarians did not generally have opportunities to move into leadership positions until mid-career.

Characteristics generally attributed to Gen Xers are that they are self-reliant, but want structure and direction. They like to know how they are doing so feedback is valued. Their communication style is direct and immediate. Achieving work-life balance is important to them. They often view baby boomers as being stodgy and resistant to change.

Millennium Generation (born 1981 to 2000)

Millennials are numerous. They are different in important ways from the two generations that preceded them. A 2014 report by the Whitehouse Council of Economic Advisors cites data that clearly indicates millennials are breaking new ground in the labor market, as well as facing substantial financial challenges that distinguish them from baby boomers and Gen Xers. Many millennials started their careers in the midst of a historic economic downturn, which has the potential to limit their earning power for years to come. Millennial women enjoy more equality in the labor market than their predecessors did. Working outside the home thus has greater benefits for millennial women and their incomes are necessary to their families in a way that was not universally true for previous generations. The millennial generation is also driving notable social and geographic trends. They are marrying later in life and they are less likely to own a home. They are moving in large numbers to urban areas. These issues will define millennials' career choices, as well as their expectations of the institutions that employ them.⁵

The millennial generation has only really entered the library workplace in the past five to seven years, and because of the impact of the recession on higher education, opportunities have been somewhat limited. They have grown up with networked, mobile, and social technologies. In libraries, only a few will ever work at an active reference desk as most reference work will be remote and mediated through digital technology. Wikipedia and Google will for them always have been the important information tools. Instruction still matters, but it is no longer focused on teaching how to use the library, rather it is about teaching how to use information. It is likely that early in their careers leadership opportunities will be limited, but once baby boomers begin retiring in large numbers, because of the relatively small size of the Gen X cohort, they will have many leadership opportunities in their mid-30s. Many will carry significant student debt that may make starting library salaries an issue in recruiting talent.

Characteristics generally attributed to the millennium generation are that they have been coddled, but that they are confident and social. They have grown up in a multicultural world and tend to be socially conscious and tolerant. They are goal oriented, participatory, and entrepreneurial. It matters to them that they do interesting and meaningful work with other bright and creative people in organizations that treat them and others with respect. Work-life balance matters to them, but the two parts of their lives are often hard to differentiate as they are always connected to both.

Compensation turns out to be very important to millennials the world over⁶, for practical reasons, such as outstanding student loans and concerns about retirement, as well as social comparison. They want to understand how they measure up vis-à-vis their peers.⁷ According to research by the Center for Creative Leadership, millennials are focused on three things: the people they work with; the work they do, which should be challenging yet balanced with their personal life; and the opportunities available to them, including feedback, development and pay.⁸ Among the top reasons they leave are a lack of work-life balance, organizational politics, bad management (including lack of development opportunities), and unacceptable compensation.⁹ They are willing to work hard, but will expect to be paid for it, so employers can “underpay or overwork, but not both.” In addition, they are likely to think about compensation holistically and will take into account flexibility, recognition and support for professional development when weighing job satisfaction.¹⁰

The Interplay of Generations in the Workplace

Generational identities can influence organizational outcomes related to socialization, turnover and conflict, as well as innovation and change.¹¹ The three generations now in the library workplace will have unique expectations of leadership, as well as distinct views about important aspects of work. For example, generational groups are likely to think differently about the issue of job security. Because baby boomers value loyalty, they are prone to envision a longer timeline when they join an organization. Millennials and Gen Xers don't have the same expectation of long term commitment from employers, but they expect more with regard to career development and advancement.¹² Cultivating an awareness of generational viewpoints and considering strategies to accommodate them can help smooth library operations, as well as effectively attract and retain librarians with sought-after skills and experience.

Differing Views on the Nature of Work

Among the issues that can cause conflict within cross-generational teams is the question of when and where work gets done. Tamara J. Erickson, a leading business thinker, observes that older generations think of work as a place to go during certain hours, while younger workers think of work as something to do anywhere at any time. Recognized as the most unsupervised generation of children in history, Gen Xers learned early to shift for themselves.¹³ They tend to have nontraditional ideas about time and space, coming and going as they please, seeing themselves as accountable for work objectives rather than hours spent at their desks. This is a characteristic they share with millennials.¹⁴ Baby boomers on the other hand think they need to be seen in the office, perhaps until late in the evening, to illustrate their value to the organization and they can be skeptical about younger colleagues who keep unorthodox schedules but are otherwise productive.

Varied approaches to communication at work can also cause confusion among generational cohorts. Meetings are likely to come together in very different ways depending on who plans them. The thoroughly networked nature of millennials' lives predisposes them to connect and convene at a moments' notice as needed, whereas baby boomers tend to invest

time in planning and scheduling in ways that often seem inefficient to millennials. While recognized by researchers as motivated and team-oriented, the baby boomer generation can be seen by Gen Xers and millennials as overly focused on process, rather than results. Baby boomers tend to be more linear in their thinking, which influences how they take in information and respond to requests for it. Millennials expect information on demand and can become frustrated with older colleagues who may be slow to respond to their communications.¹⁵

Employees within generational groups have shared experiences and values, which lead to common work-related expectations. When these are violated, negative reactions, job dissatisfaction, and disengagement follow.¹⁶ To improve cooperation, Erickson stresses the importance of assuming good intentions. She also recommends bringing diverse perspectives out in the open and “legitimizing” individual viewpoints.

Expectations of Leadership

Founders of the generational consulting firm Bridgeworks, Lynne C. Lancaster and David Stillman, have identified a number of generation-based workplace challenges or “clashpoints” for leaders to consider. These include appropriate avenues for offering feedback and recognition, as well as assumptions about employee development. For instance, Gen Xers and millennials prefer immediate informal feedback, but baby boomers are more comfortable giving and getting limited reviews at prescribed times with lots of documentation.¹⁷ With regard to employee recognition, a one-size-fits-all approach is unlikely to succeed across the generations. Baby boomers value traditional rewards, like promotions and increased compensation, while millennials value these things, they also want assurance that they are doing meaningful work. Gen Xers value freedom and are more likely to find benefits like transferable retirement funds, paid time off, and flextime attractive.¹⁸

Generational differences also influence expectations related to professional development. Like Gen Xers, millennials tend to see themselves as free agents focused on developing portable careers. Though they are more risk averse, they are able to embrace change as part of day-to-day life. Baby boomers are likely to mistrust change because they tend to be highly competitive and unexpected change could cause them to lose ground.¹⁹ Coaching and learning opportunities, including mentoring programs²⁰ and educational leaves²¹, are effective means to manage change and address expectations for career support among the generations. Each of these development strategies is well established in academic libraries.

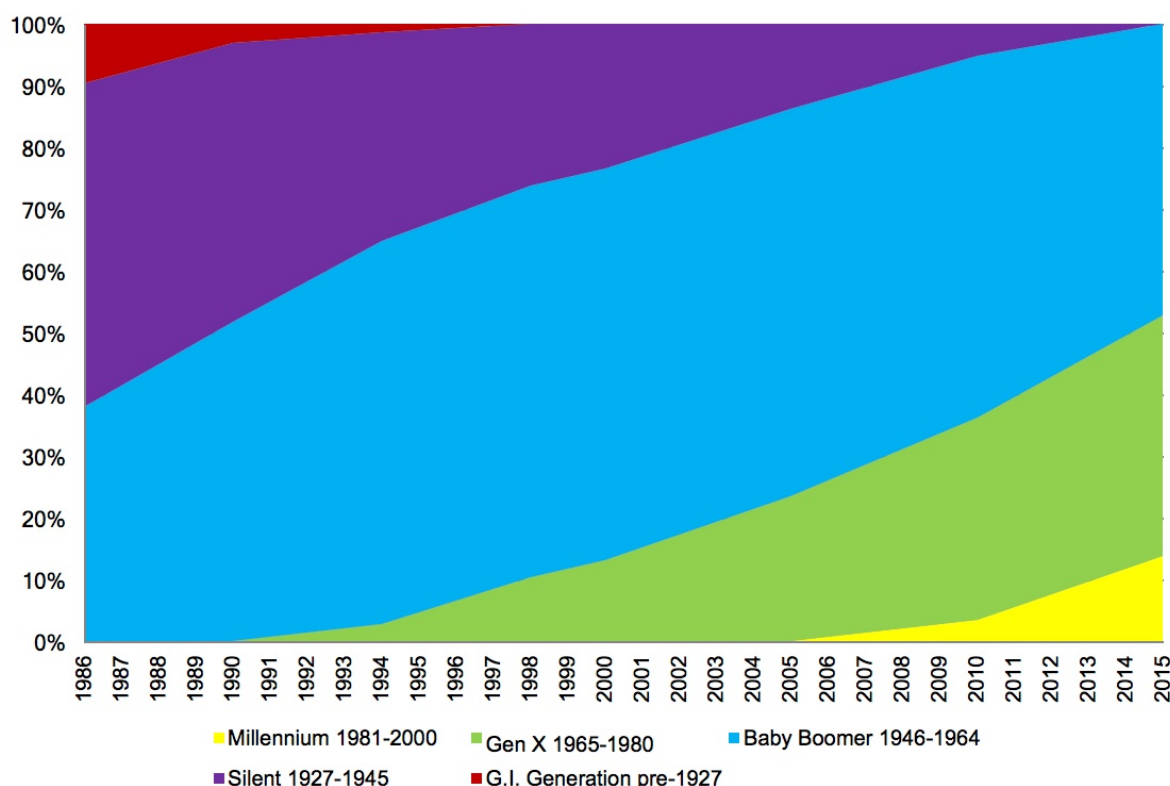
Generational differences are increasingly being recognized as a legitimate diversity issue in the workplace. Managers who can satisfy expectations for recognition, growth and advancement across all generational groups will find they have a competitive advantage in recruiting and retaining talent.²² Additionally, in order to gain the respect and buy-in of all three generations, leaders need to develop a broad leadership style and model a credible professional stance. Research has shown that honesty, competence, and loyalty are highly valued across the generations.²³ Without question, the current constellation of generational identities present unprecedented challenges for leaders of academic libraries.

Academic Library Age Demographics

In dealing with these challenges, we need first to establish the age demographics of the academic library profession. The best source for this data comes from Stanley J. Wilder who has been studying and writing about the demographics of academic librarians for thirty years, though to be precise he is looking at librarians working in ARL libraries. He conducted a series of studies for the Association of Research Libraries that are the source of the data that will be used here to document the age demographics in academic libraries.²⁴ From Wilder's data a picture of the age demographics from 1986 to 2015 can be constructed. The data is presented as percentage of the total ARL librarians in each of the generational groups, from the G.I. generation to the millennium generation. We will assume the ARL data is reflective of the academic library profession generally. Wilder looks at U.S. Census *Current Population Survey* data that indicates that this is a reasonable assumption to make. The data is shown in the table and the chart below.

| Table 1: Academic Librarians by Generation (ARL data) | | | | | | | | |
|--|-------|-------|-------|-------|-------|-------|-------|-------|
| | 1986 | 1990 | 1994 | 1998 | 2000 | 2005 | 2010 | 2015 |
| G.I. Generation pre-1927 | 9.4% | 2.8% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Silent 1927-1945 | 52.4% | 45.2% | 33.7% | 26.2% | 23.0% | 13.7% | 5.1% | 0.0% |
| Baby Boom 1946-1964 | 38.2% | 52.0% | 62.0% | 63.2% | 63.0% | 62.7% | 58.6% | 47.0% |
| Gen X 1965-1980 | 0.0% | 0.1% | 3.0% | 10.7% | 13.1% | 23.4% | 32.8% | 39.0% |
| Millennium 1981-2000 | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% | 3.6% | 14.0% |

Figure 1: Academic Librarians by Generation (ARL data)



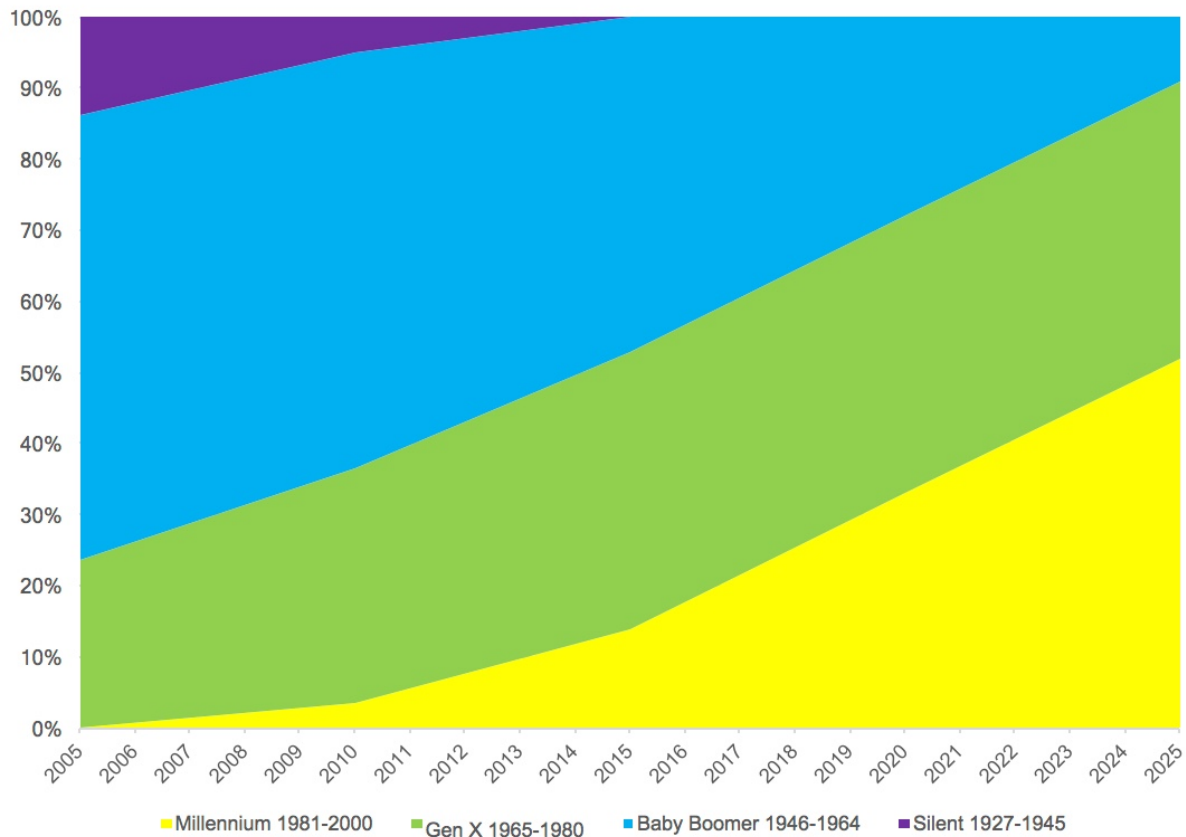
There are two points about this data that are worth making. First, the baby boomer generation of librarians is, and always has been, large. In 1990, when the first Gen X librarians entered the workforce, 50% of academic librarians were baby boomers. By 1994, four years later, baby boomer librarians made up over 60% of the academic librarian workforce and maintained this percentage for the next 15 years. Second, while the Gen X generation is five years shorter than either the baby boomers or the millennium generation, it is still notably smaller than the baby boomer generation as a portion of the librarian workforce. In 2005, when the first millennium generation librarians arrived on the scene, Gen X librarians made up less than 25% of academic librarian workforce. Like baby boomers, the Gen Xers increased their percentage of the workforce in the first years after the next generation entered the workforce, and for Gen Xers this increase was, as it was for baby boomers, about 10%. In both cases, this increase is likely the result of individuals making mid-life career shifts into librarianship. The total number of academic librarians declined slightly during the period based on Wilder's data. However, the National Center for Educational Statistic (NCES), which looks at all academic libraries, documents a 7.2% increase in the number of librarians employed in academic libraries for this period.²⁵

If we make a projection of the generational breakdown of academic librarians for the next decade based on the data presented above, by assuming that the Gen Xers maintain their percentage of the workforce; that baby boomers' percentage declines as they reach retirement (assuming that half retire at 65 and the remaining half by 70),²⁶ and that the remaining percentage is taken up by the millennium generation, the result is shown in the chart and graph

below. Note that the 2005, 2010, and 2015 figures are based on Wilder’s data and the 2020 and 2025 figures are projections.

| | 2005 | 2010 | 2015 | 2020 | 2025 |
|-----------------------|-------|-------|-------|-------|-------|
| Silent 1927-1945 | 13.7% | 5.1% | 0.0% | 0.0% | 0.0% |
| Baby Boomer 1946-1964 | 62.7% | 58.6% | 47.0% | 28.0% | 9.0% |
| Gen X 1965-1980 | 23.4% | 32.8% | 39.0% | 39.0% | 39.0% |
| Millennium 1981-2000 | 0.2% | 3.6% | 14.0% | 33.0% | 52.0% |

Figure 2: Projection of Academic Librarians by Generation

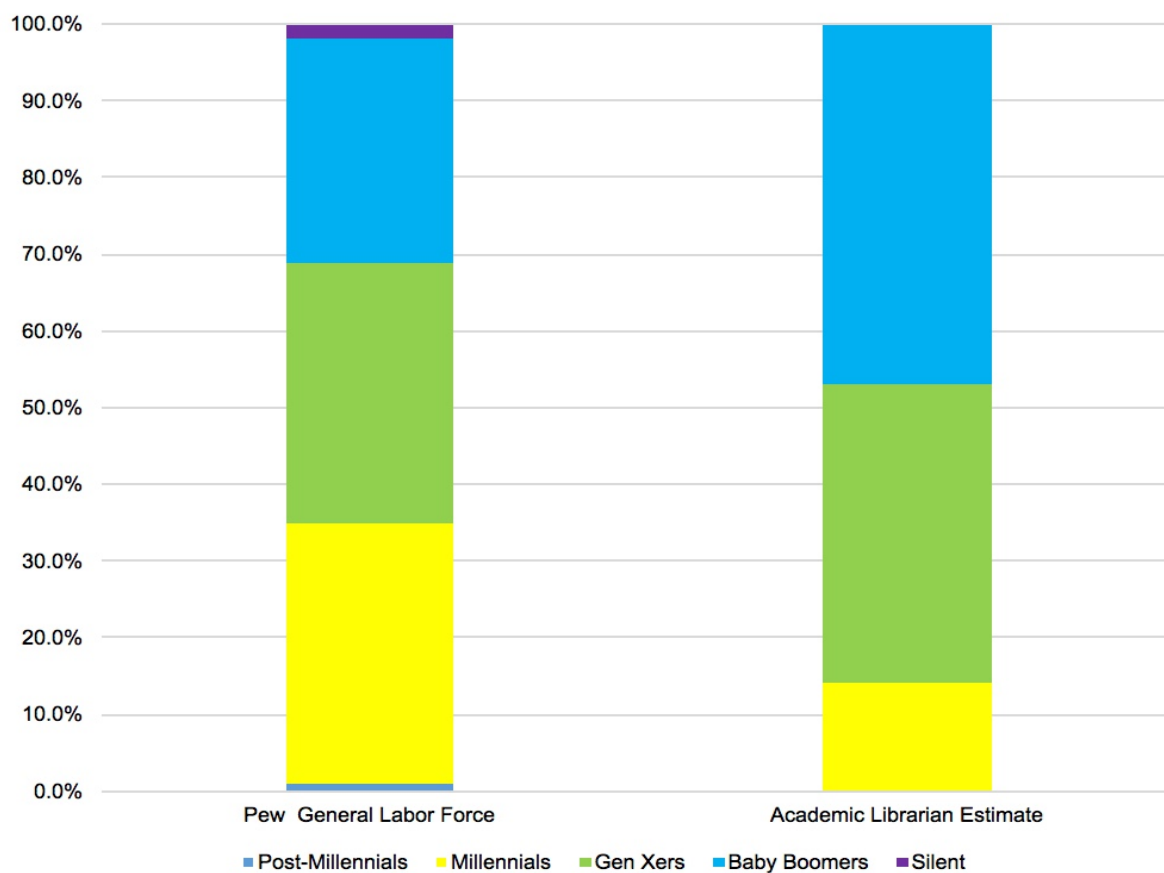


Assuming this projection is approximately correct, there are again two things worth noting. First, in 2025 we could expect that as much as 10% of the academic library workforce could still be baby boomers. Second, the millennium generation will need to supply over 55% of

the library workforce by 2025 when the next generation, born after 2000, begins entering the workforce.

It is interesting to note that today academic librarianship has fewer millennials than the general labor force. A 2015 report by the Pew Research documents that millennials surpassed Gen Xers to become the largest generation in the U.S. labor force.²⁷ The Gen Xers had passed the baby boomers in 2012. The chart below compares the Pew findings with Wilder’s 2015 numbers.

Figure 3: Academic Librarians versus General Labor Force



According to data collected as part of the American Community Survey, millennials are more likely than previous generations to pursue degrees in the social sciences or applied fields that don't align with traditional liberal arts curricula and are tied to specific careers, including communications, criminal justice, and library science.²⁸ The National Center for Educational Statistics reports an increase in the number of master's degrees in library science from 2000-01 through 2010-11 with notable declines in the next three years.²⁹

Given this, the smaller number of millennials in academic libraries may reflect the additional time required to get the academic credentials required for academic library positions, or may reflect the large baby boomer cohort that has yet to retire and so there are not yet positions for millennials. It is not clear that the pipeline for new librarians is sufficient to provide

the workforce that will be required as the baby boomer cohort retires, although the number of MLS graduates appears to be sufficient.³⁰ There is also a concern with the ability of library school programs to produce a sufficient quantity of qualified and capable graduates. These are long standing concerns, and they continue. As Deanna Marcum has recently put it:

The enormous changes occurring in research libraries are not matched by the pace of change in library program curricula. Required courses have often failed to keep up with changing practices and needs... Even though the norm among university libraries is to require applicants for their positions to hold a master's degree in library and information sciences, we have the unenviable logical dilemma of disrespecting the professional schools that produce our colleagues and while also requiring that new professionals must have the same training we received.³¹

While it appears that the pipeline of library school graduates will be numerically large enough to compensate for retiring baby boomers, the need for specialized expertise will mean the market for talent will move from being a buyer's market to a seller's market.³² There will be a need to compete for talented entry-level librarians that will push starting salaries higher. Using the median starting salary as the measure, the *Library Journal* placement and salary surveys show some signs that this is happening, though to date this trend is limited to the Northeast and Midwest.³³ This in turn will likely lead to salary compression that will risk alienating the Gen X librarians who are established in the organization. Given the limited capacity most libraries have to increase salaries this could develop into a significant concern.

Wilder's most recent study of ARL documents an amazing situation in regard to academic library leadership: it is remarkably old. While the general ARL librarian population in 2015 was the oldest it has been since Wilder's studies began in 1986 with 24% of ARL librarians over 60, ARL library directors in the United States were even older, fully 45% are over 65 and 14% are 70 or older.³⁴

The Challenge

The situation academic libraries find themselves in today is this:

- Upwards of 50% of their staff are baby boomers who are, for the most part, in the jobs they will have until they retire. In 2020, baby boomers could still be 30% of a library's workforce and by 2025 it could still be as much as 10%. The best of the group will continue to make contributions, adapt to new technologies and service strategies, and share with younger peers. They will have a rich understanding of the campus and deep organizational history and knowledge, but they will be increasingly behind the technological curve. Others in this group will be very good at doing jobs that no longer need doing. Some in this group will be annoyed that the world has changed and that the work that once defined them as professionals is no longer valued. In the very worst cases, they will be bitter complainers who have the potential to poison the workplace. It may be difficult for this group to recognize that, because of the changes in libraries, the experiences of those who follow them will inevitably be different from their own.

- The smaller Gen X cohort will need to fill the leadership positions now occupied by the retiring baby boomers. There will be challenges in finding the number of leaders required for several reasons. First, the Gen X cohort is relatively small. Second, leadership opportunities have generally come late to them so they may not have the seasoning required for senior positions. They may not even have the inclination. With a reputation for disillusionment, Gen Xers have been labeled as cynical and suspicious of authority. They mistrust the management structures devised by the silent and the baby boomer generations that preceded them. This perspective coupled with their inclination towards work-life balance can cause them to shy away from leadership opportunities. Once they are settled in their personal lives, they may not be able or willing to relocate to move into leadership positions that are not close to home.³⁵ As baby boomers leave leadership positions, replacing them could be difficult. For Gen Xers able and willing to move into leadership, there will though be many opportunities.

- The millennium generation that is entering the library workforce now will have opportunities, however they will come in the near, not the immediate term. When most of the baby boomers are gone, the field will be wide open, but this is still a decade off. Until then, opportunities for leadership or even influence may be limited. Given the characteristics of this generation, these early career constraints might be discouraging enough for them to pursue opportunities in other libraries or non-library organizations. Being good soldiers and waiting for their turn to come around is not what this generation is about. The British/American writer and motivational speaker Simon Sinek observes that impatience is a defining characteristic of millennials and predicts that, because they struggle with the notion that rewards take time to achieve, they may turn out to be the most disillusioned and disappointed generation in decades.³⁶ One study of millennial students working in Pennsylvania libraries found that 90% of respondents expected to spend only 1-2 years in entry-level positions. Nearly 60% expected to be promoted every 2-3 years.³⁷ Such high expectations for advancement will mean that libraries could easily find themselves unable to attract and retain the talent they will need five to seven years from now. It could also lead to discontent and conflict in the library.

There is evidence that these challenges are real. Joanne Oud studied the experiences of new librarians in Canadian academic libraries to see how they differed from what was expected. The study was done just as millennials were beginning to enter the library workforce. She found that that many librarians were pleasantly surprised by the amount of independence and discretion they had in their work. On the negative side, many new librarians found the bureaucratic nature of the academic library workplace with its slow pace of change and large number of meetings and committees discouraging. Also discouraging were a higher number of unmotivated colleagues and a lack of teamwork. Confirming findings of the management literature, Oud found that when initial experience differed from expectations, job satisfaction was lower.³⁸ Interestingly, Oud's recommendations focus on helping new librarians to adapt, not on creating an organization that meets their expectations.

Krisellen Maloney, Kristin Antelman, Kenning Arlitsch, and John Butler studied how future library leaders perceived academic library organizational structure and culture. Their findings demonstrate the existence of the challenge and the urgency of addressing it. They found a significant gap between future leaders' current and preferred organizational cultures. Future leaders also felt thwarted by their organizations. As the authors state:

It may be tempting to dismiss the frustrations of future library leaders as generational differences or the unseasoned perspectives of potential leaders who have not yet carried the mantle of leadership. However, the data make a strong case for the fact that, if libraries are to remain important components of the academy, the current and next generation of library leaders face an imperative to change at a faster pace and more radically than did their predecessors. This study signals the undergirding importance of organizational culture development as a strategy to achieving greater library effectiveness and preparedness for the future.³⁹

The study does not indicate the ages of the future leaders, but it is likely that they are mostly Gen X with a few millennials.

To put the challenge less delicately, the challenge is: how do you get the baby boomers out of the way of the Gen Xers and millennials while at the same time keep everyone happy and productive. The difficulty is that in trying to fix one part of the problem you are likely to exacerbate another part.

Strategies

This is a hard problem and there is probably not one magic bullet that will solve it. Rather, it is likely that a variety of strategies need to be deployed, some relate to choices about management structure and some to the culture of the library.

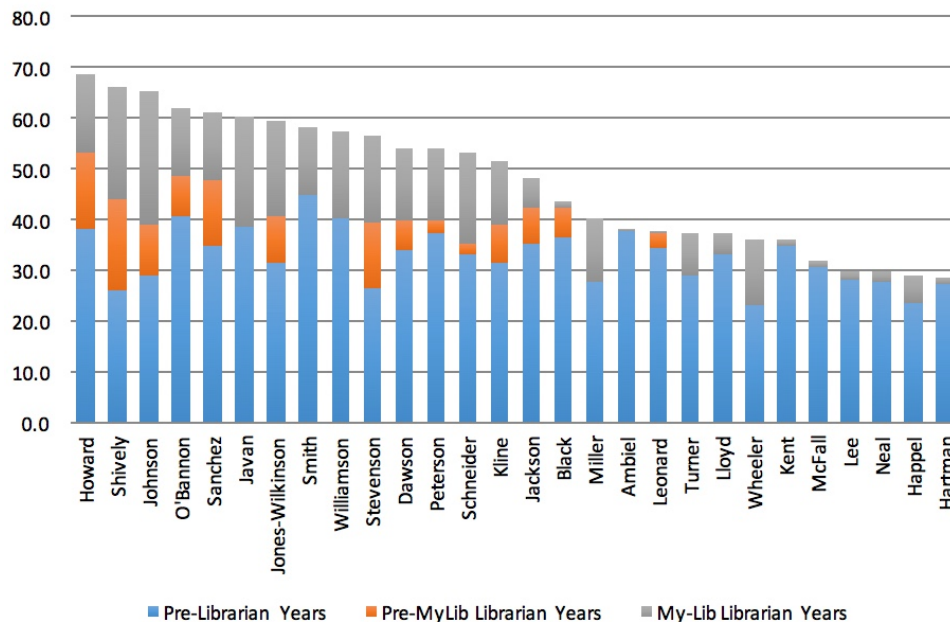
Management Strategies

- **Plan for generational turnover.** The first step is to clearly understand the library's demographics. Absent this, making good decisions will be difficult. Fortunately, tracking demographics is not difficult. With the data organized, it is easy to see where the library is and where it needs to respond. Examples of how this might look are shown in the chart and graph below. Note that in the chart the blue area is baby boomers, the rust area is Gen Xers, and the green area is millennials.

Table 3: Sample Library Demographic Summary

| Last name | Date of Birth | Age | Start Date | Tenured | Rank | Women | Minority | Years at Library | Retirement Year (at 65) |
|-----------------|---------------|-------------|------------|--------------|-----------|--------------|--------------|------------------|-------------------------|
| Howard | 03/28/47 | 68.7 | 07/01/00 | 1 | Associate | 1 | 0 | 15.4 | 2011.3 |
| Shively | 09/14/49 | 66.2 | 08/16/93 | 1 | Librarian | 0 | 0 | 22.3 | 2013.8 |
| Johnson | 10/01/50 | 65.2 | 09/18/89 | 1 | Associate | 0 | 0 | 26.2 | 2014.8 |
| O'Bannon | 09/21/53 | 62.2 | 06/01/02 | 1 | Associate | 1 | 0 | 13.5 | 2017.8 |
| Sanchez | 10/21/54 | 61.1 | 07/08/02 | 1 | Associate | 0 | 1 | 13.4 | 2018.9 |
| Javan | 09/12/55 | 60.2 | 07/01/94 | 1 | Associate | 1 | 0 | 21.4 | 2019.8 |
| Jones-Wilkinson | 07/15/56 | 59.4 | 01/15/97 | 1 | Associate | 0 | 0 | 18.9 | 2020.6 |
| Smith | 10/21/57 | 58.1 | 07/01/02 | 1 | Librarian | 1 | 0 | 13.4 | 2021.9 |
| Williamson | 06/25/58 | 57.4 | 10/26/98 | 1 | Associate | 0 | 0 | 17.1 | 2022.6 |
| Stevenson | 05/09/59 | 56.6 | 12/01/98 | 1 | Librarian | 1 | 0 | 17.0 | 2023.4 |
| Dawson | 08/24/61 | 54.3 | 06/25/01 | 1 | Associate | 0 | 0 | 14.4 | 2025.7 |
| Peterson | 09/29/61 | 54.2 | 10/15/01 | 1 | Associate | 0 | 0 | 14.1 | 2025.8 |
| Schneider | 10/02/62 | 53.2 | 03/01/98 | 1 | Assistant | 0 | 0 | 17.8 | 2026.8 |
| Kline | 03/04/64 | 51.7 | 03/02/03 | 0 | Associate | 1 | 0 | 12.8 | 2028.3 |
| Jackson | 08/05/67 | 48.3 | 01/15/10 | 0 | Assistant | 1 | 0 | 5.9 | 2031.7 |
| Black | 07/02/72 | 43.4 | 01/01/15 | 0 | Assistant | 1 | 0 | 0.9 | 2036.6 |
| Miller | 06/26/75 | 40.4 | 06/02/03 | 1 | Associate | 1 | 0 | 12.5 | 2039.6 |
| Ambiel | 08/21/77 | 38.3 | 05/01/15 | 0 | Associate | 0 | 0 | 0.6 | 2041.7 |
| Leonard | 03/25/78 | 37.7 | 09/01/15 | 0 | Assistant | 1 | 0 | 0.2 | 2042.3 |
| Turner | 07/27/78 | 37.3 | 07/01/07 | 1 | Associate | 1 | 0 | 8.4 | 2042.7 |
| Lloyd | 09/02/78 | 37.2 | 10/01/11 | 0 | Assistant | 1 | 0 | 4.2 | 2042.8 |
| Wheeler | 11/15/79 | 36.0 | 01/13/03 | 0 | Assistant | 0 | 0 | 12.9 | 2044.0 |
| Kent | 11/25/79 | 36.0 | 08/01/14 | 0 | Assistant | 1 | 0 | 1.3 | 2044.0 |
| McFall | 02/10/84 | 31.8 | 08/01/14 | 0 | Assistant | 1 | 1 | 1.3 | 2048.2 |
| Lee | 12/02/85 | 30.0 | 01/06/14 | 0 | Assistant | 1 | 1 | 1.9 | 2050.0 |
| Neal | 04/02/86 | 29.7 | 01/06/14 | 0 | Assistant | 0 | 0 | 1.9 | 2050.3 |
| Happel | 12/01/86 | 29.0 | 07/05/10 | 0 | Assistant | 0 | 1 | 5.4 | 2051.0 |
| Hartman | 06/15/87 | 28.5 | 10/13/14 | 0 | Assistant | 1 | 0 | 1.1 | 2051.5 |
| Total | | | | 15 | | 16 | 4 | 296.3 | |
| Average | | 46.6 | | 53.6% | | 57.1% | 14.3% | 10.6 | |

Figure 4: Sample Library Demographic Summary



- **Institute incentive programs to encourage baby boomers to retire early and thus create opportunities for Gen Xers and millennials.** Planning for generational turnover and managing the ongoing retirement cycle through employment and compensation policies have been concerns in the higher education environment for some time now. Many generational challenges presenting in current academic staffing structures are related to the end of mandatory retirement in 1994.⁴⁰ Both positive and negative outcomes are associated with delayed retirement. While senior staff and faculty can position their organizations to better respond to increases in enrollment and serve as a valuable source of institutional knowledge, those who stay in their roles past 65 can limit promotional prospects for others, reduce the number of new hires and increase overall labor costs for their institutions. Healthcare benefits in particular contribute to difficult financial dynamics for organizations and not surprisingly, worries about health benefits have been identified as the most important variable in decisions to retire among faculty and staff.⁴¹ Across the sector, institutions are using early retirement plans and phased retirement options to try and smooth the process of generational turnover.⁴² Admittedly, individual academic libraries may not have control over the retirement programs offered by their parent institutions. They can however control communication about the range of retirement pathways available to their employees, as well as access to and promotion of health and wellness programs, two things cited in a recent TIAA-CREF study that have significant potential to impact staffing costs and retirement patterns.⁴³ In another TIAA-CREF study in 2007 22% of respondents reported they were very likely to take advantage of early retirement buyouts. Since 2000, about 40% of U.S. academic institutions have offered early retirement programs. For institutions, buyout payments have gone up significantly in the face of economic downturns. Additionally, many involved in the study reported a high level of job satisfaction, which influences planning and timelines for retirement.⁴⁴ A variation on the early retirement strategy would be to develop ways for baby boomers to move to part-time work and to transition into

retirement over several years. Contrary to what might be expected, baby boomers are likely to find these types of opportunities attractive. The baby boomer cohort has been identified as uniquely suited to flexible part-time work arrangements, such as bridge employment opportunities outside the academy and phased retirement⁴⁵, that allow them to continue to share their accumulated expertise as an alternative to retirement.⁴⁶ In the realm of academic libraries, these approaches free up resources to hire new staff while allowing the library to continue benefiting from the contributions of librarians with a career's worth of experience. For the older librarian, the workload would be reduced and some income would be maintained, which in many cases might be a worthwhile tradeoff. The 2007 TIAA-CREF survey found that 40% of respondents saw themselves as very likely to pursue these types of options, which provide a more gradual path to retirement.⁴⁷

- **Create leadership opportunities through reorganization.** We tend to think that there is an ideal organizational structure for any library, but this is probably not the case. As Roger C. Schonfeld comments at the end of his Ithaca S&R report on research library organizational structure, reflecting on the experience of several long-standing directors, "For these directors, organizational structure is not something to try to perfect. Rather, it is contingent on the needs of the campus and the abilities of the library. Consequently, the best organizational structure for today will be imperfect and will at some point in the future need to be rethought, so a regular reexamination of structure and leadership roles is an important ongoing responsibility of the director."⁴⁸ In the context of leadership development, it is probably best to think of the organization of the library's top leadership as flexible. When there are several strong experienced leaders they can be given broader spans of control and there will be few, probably three or four AUL positions. If the library has fewer experienced leaders, it might be better to reorganize so that there are six to eight reports to the director, or a deputy director. This would engage more people in leadership roles, but these roles would be less demanding and provide opportunities for those in the positions to develop. Leadership failures would have less consequence. It may be that the flatness of the organization should be primarily determined by the level of leadership available to the organization and the need to develop leadership for the future.
- **Reframe the trend toward flat hierarchies as an advantage.** Flat hierarchies have inherent benefits that align well with generational challenges. They offer flexibility and foster effective communication. Decision-making becomes more democratic, leading to higher levels of buy-in across the organization. Importantly, within the generational puzzle, they create access to leadership, something that both Gen Xers and millennials value and actively seek. Perhaps because they have always enjoyed close relationships with their parents, millennials expect easy access to senior leadership, to ask for help and to share ideas.⁴⁹ They may be the youngest generational cohort in the library, but they are civic minded with a strong sense of personal responsibility and they count on being respected as equal partners by colleagues of all ages and positions.⁵⁰ Similarly, employees in the Gen X cohort value opportunities to form relationships with decision-makers and those with more experience from whom they can learn.⁵¹ Setting aside the obvious disadvantage of fewer opportunities for leadership advancement, the trend toward flatter organizational structures among academic libraries has genuine advantages on which to capitalize in order to meet the needs of a generationally diverse workforce.

- **Fill leadership positions internally when they become available and hire new librarians at the entry level.** This has the advantage of providing leadership opportunities to librarians inside the organization. Many of these will be baby boomer or Gen X librarians who are place bound and might not otherwise have had this kind of an opportunity. They can develop in new ways that require management, but not technical, expertise. It also means that the library will have the opportunity to hire new librarians with unique or underrepresented skills and expertise. These librarians will likely be Gen Xers or millennials and a critical mass of these cohorts will provide a counter to a baby boomer heavy organization and create space for younger librarians. The downside to this approach is that if there is not sufficient talent in the organization, it may not yield high quality leadership from existing staff. Even when compromises are required, this is probably a good strategy.
- **Create a talent acquisition strategy.** Kimberley Bugg reviews industry best practice and recommends that academic libraries create a talent acquisition strategy based on industry best practices that includes four parts. They are: 1. Strategic planning (preparing); 2. Building an attractive organization (branding); 3. Forming talent communities (pipelining), and 4. Developing a holistic candidate experience.⁵² Given university policies, it may not be possible to fully implement such a strategy, but implementing it to the extent possible will provide a library with a competitive advantage in the pursuit of talent.
- **Hire non-MLS personnel for librarian positions.** Competition for librarians will likely become intense as large numbers of baby boomers retire. Filling librarian positions with non-traditional candidates may then become a useful strategy. James G. Neal uses the term “feral” librarians meaning that these non-MLS professionals were raised without the standard library training. They were, as Neal puts it “raised by wolves.”⁵³ Campuses with graduate programs may find this a good strategy as there will be Masters and PhD students who may wish to stay on the campus and who are not otherwise able to find faculty positions. The Council on Library and Information Resources Postdoctoral Fellowship Program is designed to develop this pipeline.⁵⁴
- **Reduce professional positions.** In a number of specific library departments, such as bibliographic services and the reference desk, work that was previously the purview of librarians is increasingly being carried out by specialists or student employees. New technologies have also redefined staffing needs with regard to collection development and information systems. Labor market constraints have led some libraries to hire staff with appropriate technology skills rather than systems librarians.⁵⁵ Additionally, the adoption of patron-driven approaches to acquisitions have reduced the amount of time librarians need to invest in collection development activities. It may be possible to increase the productivity of librarians by providing support staff to assist with simpler tasks. Even without a reduction of positions, such a shift would permit librarians to refocus their energies on areas of current importance such as information literacy instruction or digital scholarship.
- **Anticipate and address the likely prospect of baby boomer and Gen X librarians reporting to millennials.** A special report of the *Chronicle of Higher Education* observes that increasingly baby boomers and Generation X employees at academic institutions find themselves reporting to millennials who see the world of work differently than they do. The report cites a need for more coaching and training, to help millennials learn how to build trust and gain other soft skills that contribute to effective leadership.⁵⁶ A large-

scale study of German companies found that older workers reporting to younger managers grapple with negative emotions that can limit productivity. To mitigate the negative impact of the “status incongruence” that can result from these age-inverse reporting situations, the authors recommend assessing employee’s feelings about working relationships, as well as training young managers to supervise older direct reports.⁵⁷ This argues for the need to invest in leadership development as part of librarian professional development.

Cultural Approaches

- **Recognize that age diversity in the organization is important to pursue.** To begin with, when all of the baby boomers finally do retire, it would be best if there were Gen Xers and millennials with some experience in the organization ready to take their place. Secondly, as research consistently shows, diversity makes an organization more innovative and successful. This is in no way to suggest that an organization should, or needs to, discriminate on the basis of age when hiring. Rather, at a policy level, which positions to fill, how to describe them, and how requirements are structured can increase the age diversity in the organization. It may also be the case that an explicit organizational conversation about this issue will lead baby boomers to consider how to position the organization they will leave behind so that it can be most effective after they are gone. Carolyn A. Martin and Bruce Tulgan recommend an organization-wide conversation about cross-generational issues, to enable employees in distinct cohorts to recognize their own and each other’s strengths, and to help them discover, “that under the strata of age diversity lies a bedrock of unifying needs and expectations.”⁵⁸ Margaret Heffernan, the writer and entrepreneur, recommends a similar exercise she refers to as building social capital. Employees tell their stories to each other or alternatively, tell each other’s stories, in order build the sort of deeper relationships and trust that promote collaboration and increase productivity.⁵⁹
- **Foster an organizational culture of learning.** A number of researchers have found that while the baby boomer, Gen X, and millennial cohorts have points of conflict, they also have some important things in common. One of them is a predisposition towards lifelong learning. Products of their Gen X parents’ no-child-left-behind philosophy, millennials are the best-educated generation in history and they know it.⁶⁰ They recognize that learning creates opportunities and in order to engage and retain this generational cohort, employers need to provide training support and professional development options far beyond what the baby boomers and Gen Xers expected in the past, although older workers have their own learning agendas as well. Lynne Lancaster has observed that the relative small size of the Gen X cohort and the ever growing imperative to retain them in order to meet the pending leadership vacuum will, “put pressure on libraries, to provide more well-thought-out and varied career paths, more opportunities for mentoring and education, and more options to champion change.”⁶¹ Though they are seen as being past the career stage where further education would be expected, baby boomers too value personal growth.⁶² This need is often overlooked to the detriment of organizations.⁶³ Making both monetary and practical support for professional development activities a clear priority communicates to employees that leadership is willing to invest in them as individuals. A diverse range of mentoring programs, including traditional mentoring, peer-to-peer, and reverse mentoring have the potential to smooth intergenerational conflict in the library⁶⁴ and contribute to higher levels of productivity, especially in the realm of scholarship.⁶⁵ Cultural competency

trainings and intergroup dialogues can help develop soft skills that promote better cooperation, as well as enhancing services to the public. The looming wave of baby boomer retirements will mean a significant loss of institutional knowledge that could put academic libraries at risk unless intentional strategies for knowledge transfer are implemented.

- **Create a parallel organization to promote innovation from the bottom up.** This is the strategy presented by John P. Kotter in his 2012 *Harvard Business Review* article.⁶⁶ Kotter is looking at how organizations respond to turbulence and disruption and why they so often fail to do so. As he says, “The examples always play out the same way: An organization that’s facing a real threat or eyeing a new opportunity tries—and fails—to cram through some sort of major transformation using a change process that worked in the past. But the old ways of setting and implementing strategy are failing us.”⁶⁷ What Kotter proposes is a complementary network structure that sits alongside the hierarchy. The network consists of groups that are populated with people drawn from across the organization who have an interest in working on a problem or issue. These groups might be self-organizing and coordinated by a central group that Kotter calls the “guiding coalition”. Kotter argues that these groups, because they are outside of the hierarchy can move more quickly and imaginatively than the hierarchy and thus the organization is more adaptive and ultimately successful. Importantly the hierarchy remains in place to do what it does well, manage operations. Kotter suggest that the network structure does several things that are important in addressing the dilemma academic libraries face. The network groups can create many change agents, not just the usual few. It creates a want-to and a get-to, not just a have-to mind-set. It harnesses passion and allows for more leadership, not just more management. Kotter’s mantra is, “two systems, one organization.” The application of Kotter’s structure in the circumstances of libraries today might mean that baby boomers would maintain the hierarchy; the millennials populate the network, and the Gen Xers pick the role that suits them best. This could provide everyone an opportunity to be happy and productive.

- **Reward performance and output rather than time in the office.** As policies permit, affording library employees at all levels flexible work helps create an environment in which accomplishments are valued above physical presence. This also makes work-life balance easier. Giving employees more control over their time can lead to higher levels of engagement and retention.⁶⁸ Effective performance management is sometimes eclipsed by bureaucracy in larger organizations and the academy is no exception. Promoting substantive conversations between librarians and those to whom they report is a useful approach to managing diverse generations’ concerns in the library, while at the same time enhancing engagement. In particular, untenured millennial librarians will value the opportunity to sit down with a director or dean to talk about their professional paths. Martin and Tulgan recommend the use of such meetings, both formal and informal, to monitor and encourage employees’ progress.⁶⁹ Exit interviews, a prominent practice in many fields, can provide similarly helpful information, but take place too late for any positive interventions. A recommended alternative is “stay interviews”, in which supervisors check in with employees to find out about their evolving goals and what aspects of their work they find most rewarding.⁷⁰ One area in which such practices could prove to be valuable is the retention of diverse librarian talent. Research has shown that in spite of increased efforts to recruit minority faculty, high rates of turnover persist.⁷¹ An intentional commitment to these types of check-in conversations is a smart retention strategy.

There are likely other strategies but approaches that do not take into account the demographic realities are likely to create conflict and they are unlikely to achieve the results they are aiming for.

A Final Note on Organizational Culture

In an Op-Ed piece in the *New York Times* of December 20, 2015 Adam Grant asks the question that he often gets from people beginning their careers, “Which Company Is Right for You?” The advice he gives is to judge the organization’s culture by listening to the stories told by the people who work there. As he says, “Take a close look at these stories, and you’ll see that they deal with three fundamental issues. First is justice: Is this a fair place? Second is security: Is it safe to work here? Third is control: Can I shape my destiny and have influence in this organization?”⁷² These concerns are often cited as issues of importance to millennials, but they are important to everyone. What is going to be different going forward is that for the first time in a long while the market for librarians is a seller’s market. Talented librarians who are prepared to move, as younger early career librarians tend to be, will have choices and they will exercise them. If the stories told about your library depict a toxic environment, even good salaries and interesting work will not be enough to attract and keep the workforce the library needs. If the library is not fair, safe, and empowering, nothing else will matter.

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control, level, size, and Carnegie classification of institution: Fall 2012,” *Supplemental Academic Libraries Survey (ALS) 2012 Tables to NCES 2014-038*, <http://nces.ed.gov/pubs2014/2014038.pdf>.) This would imply that 6.7% of the academic librarian work force is being replaced each year. This should be sufficient to replace retiring baby boomers if we assume they make up about 50% of the academic librarian work force and their retirements are spread evenly across the generation.

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