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# The Path to Library Leadership: The Importance of a Leadership Plan

Trevor A Dawes

Washington University in St Louis, tad@trevordawes.com

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## The Path to Library Leadership: The Importance of a Leadership Plan

### Top Takeaways in this Chapter

- Develop a personal mission statement and refer to it often
- Build relationships with mentors – formal and informal
- Know your limitations
- Continue to learn and grow

Preparing leaders in the library profession is by no means a new phenomenon. However, as one looks at the number of leadership training and development programs, institutes, workshops, and conferences, you might begin to ask the question, “where are all the people who participated in these programs?” Some choose to remain the library profession. Others leave, voluntarily or involuntarily, because of lack of opportunities. Still others will not assume positions that are traditionally thought of as leadership positions, though I would argue that these people are still leaders in their own right.

Although I believe there may be some qualities of leaders that are innate, several leadership qualities can be taught or developed, and can be nourished under the right circumstances. At the start of my college career, it was never my intention to become a library leader; in fact, it was not my intention to become a librarian. My leadership journey, highlighted in this chapter, will address the actions I took to develop those skills, as well as the support I received from family, friends, mentors, and colleagues that made it possible for me to be where I am today – an associate university librarian at a mid-sized university and a past president of a national library association.

I’ve mentioned two positional titles that I hold to describe leadership in my own career, but is holding a title the sum-total of leadership? Certainly not! Early (1900 – 1929) definitions of leadership focused on control and power (Rost 1991). However, by the 1940s, the definitions began to incorporate elements of dealing with people and about the relationships among the leaders and those being led. As the study of leadership began to grow and evolve, so did the definition. By the 1960s there was “increasing support for viewing leadership as behavior that influences people toward shared goals” (Rost 1991). Definitions that include this concept of influence continue through today, and those definitions, for me, are the ones I choose to use when I think about leadership.

### **Introduction**

What are leadership characteristics? There is no simple answer. Leadership experts will often suggest that the skills or traits needed may be situational and that an effective leader will have the ability to adjust his or her style to the particular situation. Specifically, for library leaders, Hernon, et. al believe there are several “competencies and responsibilities of top management teams” (Hernon, Powell and Young 2003). These competencies include:

- Having a Vision for the Future: establishing and maintaining a culture that encourages staff to develop their maximum potential
- Developing Staff: values and respects the ideas of others

- Managing Personnel: deals with personnel consistently and fairly
- Planning and Budgeting: prepares a budget to implement the goals and objectives of an organization
- Managing Operations: plans, conducts, and participates in meetings so that the collective resources of the group are used efficiently and effectively
- Possessing Political and Negotiation Skills: Relates library needs and goals to those of funding officials and agencies
- Engaging with the Community: understands the flow, use, and value of information in society as a whole and relates this to the role of libraries
- Fundraising skills: develops and writes proposals for state, local, federal, and private funds

Interestingly, these authors discuss what might be considered “hard skills.” I would add to this list of competencies:

- Communicating effectively (which includes having excellent listening skills)
- Acting ethically
- Managing time efficiently, and
- Demonstrating empathy

This list could grow lengthy . As each of us think about a leader that we admire, we can think of some of the characteristics of that person that may have been in the list above, or that could be added to the list. This list of traits is therefore not exhaustive, nor can any list be. The leadership qualities above represent only a sampling of those that Herson et.al describe. They, because of the volume of traits they identified in their research, categorized the traits as follows<sup>1</sup>:

- Planning
- Protective Work Environment
- Problem Solving
- Staff Growth
- Leadership (Advocacy)
- Leadership (Donor Relations)
- Leadership (Image/Role Setting)
- Leadership (Direct Manage Change)
- Leadership (Strategic Directions)
- Educational Attainment
- Experience/Prior Activities
- Professional Growth/Involvement/Accomplishment
- Professional Presence
- Personal Characteristics (Internal Make-Up)
- Personal Characteristics (Dealing With Others)
- Knowledge Areas (Professional Issues)

The above list demonstrates that there is no shortage of characteristics that we might look for in leaders. It would be impudent to think that any leader would – or could – have all of these qualities. However, as many leadership theorists will suggest, leaders should have the ability to adjust their style according to the situation. Being able to adjust your style may

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<sup>1</sup> Herson, Peter, Ronald R. Powell, and Arthur P. Young (2003). The Next Library Leadership: Attributes of Academic and Public Library Directors. Westport, CT: Libraries Unlimited, pp. 121-125.

present its own challenges, but as George and Sims note in *True North*, leaders must live an authentic life – one that integrates the major elements of both the personal and professional self (George and Sims 2007).

The first thirty years are the formative years for any leader and there are several components comprising this stage. During these formative years, there are many ways in which one can develop leadership skills – in the community; on sports teams; in student government; in employment; or in extracurricular activities. It was important for me to participate in many of these activities because of my level of interest in them (student government employment, etc.) or because I believed they would bring some benefit to others (community service work).

Participating in these activities helped me to acquire some of the characteristics that Herson describes. Working as editor of my high school student newspaper, being elected to student leadership positions, and volunteering both in school and in the community helped to hone some of the skills and traits I believe have helped while on my leadership journey. I understand now, in retrospect, the importance those experiences had on shaping my present positions as I continue to use – and improve upon – what I learned then. I would continue to enhance my abilities through additional development opportunities once I determined my path.

### **Foundations of Leadership**

Leadership development programs abound. I have participated in my share of these programs and learned from each one. However, the foundations of my leadership abilities began well before my participation in any of these programs. Having a supportive network will make a difference in how you develop as a leader. My network began with my family.

My parents and siblings had told me, since I was young, that I had an entrepreneurial spirit. These were not the exact words, they were more like, “you’re a businessman,” but that was the language of the day.. My business sense at the time involved taking on the chores that my siblings were to have done – if they paid me to do it. Payment at the time didn’t have to be in cash, though it often was. It could have also been more time for me to control the TV channel (though there weren’t many options) or other “perks” that children might find exciting or rewarding. My siblings were all too happy to oblige. And although our parents didn’t necessarily celebrate these activities, neither did they castigate them. Through these activities I developed a strong work ethic and a sense of self-worth – both of which are important for leaders to have.

That I wasn’t discouraged from these activities is not, on its own, sufficient support. My ability to turn those earnings into savings or into being able to gain some “independence” was definitely supported – and ultimately caught the attention of my siblings. I had the resources – and the time – to do some of the things that I wanted to do and they also wanted to have a similar level of independence. I did not think of that as leadership at the time but in retrospect, my actions and my behaviors had a direct *influence* on those of my siblings. Information Today publishes the *Accidental Series* of books in which librarians discover new

roles for themselves as the nature of the work required in their libraries shifts<sup>2</sup>. In a similar manner I would describe myself – in this instance – as the accidental leader.

Support in the leadership journey goes beyond family. The familiar saying, “it takes a village,” is just as apt when considering leadership development as it is when raising a child or supporting a family. A part of this village includes mentors, and I am honored to have had many mentors – both formal and informal – in my career. Mentors play an invaluable role in leadership development. They can promote growth, encourage learning, impart knowledge, and provide advice. In the best mentor relationships both the mentor and protégé learn from each other.

It is unlikely that anyone will dispute the value of mentors, but finding the right mentor – one in which there is a mutual relationship built on trust – can often be a challenge, but not an insurmountable one. Many library associations have formal mentoring programs; mentoring relationships can develop organically among colleagues; and some libraries have formal mentoring programs although the expected outcomes of these programs will often vary. Some of the employer-sponsored programs are intended to acclimate new employees to the organizational climate and culture; others are geared towards preparing employees for the tenure and/or promotion process. In finding a mentor it will be helpful to know the area(s) in which you would like to be mentored.

My first library mentors were informal ones. I was a work-study employee in the library while an undergraduate student and although I had no idea I wanted to be a librarian at the time, several librarians with whom I worked encouraged me to think about a career in librarianship. It is uncommon, I suspect, for high school students – especially young Black males – to think about going to college to become a librarian. That certainly was not on my agenda. One of the librarians, however, who still remains a mentor today, is an African American, male librarian. He kept telling me that I would make a good librarian, and that I’d be a library leader. This librarian would also help me become active in professional associations. This relationship was an informal one. I was, after all, a work-study student with no desire to become a librarian. Seeing in me the qualities of both a librarian and a leader, he sought to encourage those.

I didn’t believe I was performing exceptionally well – of course I was doing my best, and I had been, in my time as a student, promoted to a student supervisor position, doing the work of some of the full-time staff. I had occasion to interact, almost daily, with my mentor. We had formal meetings that were work related, but we also had many informal conversations about a wide range of topics. Through these conversations he discovered that I was not committed to a particular major and he therefore kept suggesting library school as an option. I appreciated, but didn’t heed, the advice – at least immediately.

It would be almost ten years after completing my undergraduate studies, during which time I continued to work in libraries, that I completed my Master of Library Science degree and began working in my first “professional” library position, and realized that I had internalized the advice I had gotten. I worked in an environment that was supportive of professional and leadership development and I had the opportunity to participate as an attendee in a leadership development program for early-career librarians. I was assigned a

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<sup>2</sup> *The Accidental Series*. Information Today. <http://books.infotoday.com/accidental.shtml> [Accessed 29 July 2015].

formal mentor for this program. This mentor is an international leader in the field, travels and speaks extensively and is incredibly knowledgeable about the profession. Primarily because of his schedule, we were not able to meet regularly or have impromptu conversations in the hallway. But we did have formal scheduled meetings, and we would get together at conferences or other events. Although the relationship I have, and still maintain, with this mentor is different from that which I have with the previously mentioned one, both have been effective in providing support, guidance, career advice, employment references, and insight into the profession.

With the first mentor I learned more about the profession and what it means to be a librarian. I also gained information about how to develop a career plan. At the time we met he was a subject librarian at the university. He went on to be a department head; left that university for another; and is now a library dean at a different institution. We maintained our relationship throughout his moves and he shared information about what to look for when searching for a job; how to know if the job/institution is a right “fit” for you, and other tips about career planning and advancement. From the second I learned more about leadership development. As this was a formal relationship, created as a part of a leadership development program, we had more structured conversations about the topic of leadership; what it means; how to be an effective leader; and we spoke some about what it’s like being a director of a large, often complex library organization.

These two mentors provided different, but both rewarding, experiences. These also represent only two types of mentoring relationships that I have built with colleagues over the years. Although different in their nature they serve as examples of how a mentor/protégé relationship can be sustained over several years even if the parties are not in the same institution. One of the keys to success as a leader is to find mentors who will steer you in the right direction. There have been more than one occasion when I have called upon a mentor to help walk me through a situation with which I was dealing at work. Although I have been fortunate to have appropriate support from our human resources offices, I have found it helpful to check in with my mentor when I have a particularly thorny personnel matter about which I need some advice. The external perspective can be invaluable. These mentoring relationships will not only help with leadership or career development, they can also lead to long-term friendships. One of the principal benefits for me was gaining the ability to develop a leadership plan.

Great leaders empower and support others on their leadership journey. Just as I found mentors and have benefitted from their expertise and counsel, I believe it is important to be a mentor to others.

### **Developing a Leadership Plan**

Having a personal mission statement is an important planning tool irrespective of the role you intend to play in libraries. This plan will provide the context for all your actions, and can also serve as a motivational tool. The statement describes your purpose and also incorporates the values that you hold dear. In developing the statement one must be realistic and set goals that are both a stretch, but ones that are also attainable. Once the goals are defined, the process for attaining them must also be outlined. Developing a leadership plan is very much like creating a mission statement for a library or any other

organization. In this plan you envision where you want to be and what steps you need to take in order to get there.

Developing my mission statement was a journey of self-(re)discovery and learning. There are a few concepts – or, perhaps, guidelines – that I keep in mind when creating my plan:

- Set S.M.A.R.T. (Specific, Measurable, Attainable, Realistic, and Time-Bound) Goals
- Create an action plan to pursue the goals
- Be open to new opportunities / be flexible
- Take time to reflect on experiences
- Help others learn
- Focus on strengths and make a development plan
- Seek feedback from a variety of trusted sources
- Remember that this is a process

There are numerous tools available to help one create a personal mission statement. Library leadership programs (or other non-library specific programs also) may include a component on how to set and achieve personal goals. One tool that I have used, and recommended, is the “Values, Visions, and Missions Work Sheet” in the *1995 Annual*.<sup>3</sup> The worksheet uses a process of “clarifying values, writing a vision statement, and then developing a mission statement” (p. 63). This step-by-step comprehensive process begins with sharing some principles of personal strategic planning, followed by some questions designed to elicit your personal vision. Sample questions include:

- List some core values that have been important to you throughout your life
- Describe the career you want and the professional person you aspire to become
- Describe your distinctive competency

The vision statement then describes the person you want to be in three to five years. Using a set of established criteria, you then draft the mission statement that is very specific and serves as a guide for making all professional and personal decisions. The worksheet ends with developing the strategies that will be used in attaining the goals.

I was first introduced to this worksheet when I participated in a leadership development workshop in the early 2000s and have been using it ever since. One example of its use was when I decided, in 2005, that I wanted to become president of a national library association within 5 years. As a first time attendee of this conference in 2005 I was so impressed with the quality of programming and the organization itself that could put on such a relevant conference that I wanted to lead that organization. There will be moments, such as this experience for me, that have such an impact on you, that it helps to shape your future. I had recently started a new job, part of an earlier plan, and therefore needed to refresh my goals.

After securing support from my then library director, I stood for election to the board of the association. Despite an unsuccessful bid for a seat on the Board, I continued to remain active in the association by actively participating in committees, chairing groups, and attending conferences. I also shared with almost anyone who would listen that I wanted to be president of the association and why. I was both surprised and delighted when, in 2011,

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<sup>3</sup> Pfeiffer, J. William. 1995. *The 1995 Annual*. San Diego: Pfeiffer & Co.

the chair of the nominating committee of the association called to ask if I wanted to stand for election as vice-president/president elect. I was successful. The invitation to be a candidate came a year after my timeframe and my term as president two years later, but I am confident that establishing, and actively working towards, the goal, enabled me to make it happen.

Over the years I have found other resources that help develop leadership skills/abilities. Providing more than just information on how to develop a vision, *One Piece of Paper* by Mike Figliuolo asks a series of questions to help develop the leader<sup>4</sup>. Figliuolo helps to understand leadership philosophy, how to lead yourself and others, and how to lead a balanced life.

Whether one uses the Pfeiffer worksheet or *One Piece of Paper* or some other resource to develop a vision and mission, the objective is the same: to plan that future desired state and the steps needed to get there. It's important to review the plan regularly to ensure that you are on target (I keep mine posted on a bulletin board in my office where I can see it). Be sure that decisions you make are consistent with the plan, although it's also important to maintain a certain amount of flexibility. There may be circumstances that require a course correction – whether slight or major. The timeframe may need to be adjusted or new goals set altogether if the goals are reached in advance of – or after – the stated timeframe.

### **Invest in Yourself**

Leadership development is never complete. Setting a vision and determining goals are a part of the development process, but so is continuous learning. Like with finding a mentor, learning may be formal or informal. Formal leadership development programs for librarians are described extensively in *Creating Leaders: An Examination of Academic and Research Library Leadership Institutes*.<sup>5</sup> The author identifies and critiques several national leadership development programs, many of which are still extant. Some state, regional, and local library associations offer leadership development programs, as do individual libraries and library consortia. Informal learning also happens in a variety of ways: through networking; at conferences; or online, for example.

After developing a personal mission statement, aspiring leaders should consider participating in a leadership development program. The program of choice should be based on the desired outcomes and whether or not that program is designed to meet those needs. I knew fairly early, after I began working in libraries, that I wanted to lead in some capacity. My mentors also affirmed that I had some leadership qualities. Before even beginning my library science program, I earned a Master of Arts degree in Educational Administration, understanding the benefit this would have for academic library positions. This program included courses on human resources management, budgeting, student services, and private school leadership. These courses would serve me well later as I assumed positions of greater responsibility in libraries.

I wanted, however, to get a better sense of library leadership programs and if there was something else to be learned in a more controlled and focused setting. It was at this point,

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<sup>4</sup> Figliuolo, Mike. 2011. *One Piece of Paper*. San Francisco: Jossey-Bass.

<sup>5</sup> Herold, Irene M., ed. (forthcoming). *Creating Leaders: An Examination of Academic and Research Library Leadership Institutes*. Chicago: Association of College and Research Libraries.



and after I received my library degree that I participated in my first library leadership development program – aimed at early career librarians. In addition to covering the basics of leadership theory, this program concentrated on library assessment techniques; understanding and developing leadership styles; and networking. Years later I would participate in two additional leadership programs where we concentrated on topics that included collaborating with IT colleagues, understanding the higher education landscape, enhancing presentation skills, project management, and networking.

One of the primary benefits that is common across all programs, however, is the network of colleagues with whom I shared the experience. The tangible takeaways about leadership theory, project management, presentation skills, etc., are all invaluable. I cannot overstate the value, however, of meeting a group of colleagues on whom you can call with questions; or when you want to get advice; or just to have a conversation about a problem or issue. Many of my colleagues who have been through similar programs also share this sentiment. The lesson I learned from these programs therefore, is that there is as much learning that happens in the classroom as happens outside the classroom and that it is important to maintain positive relationships with my cohort members, as they provide a strong support network.

It is generally expensive to participate in these programs. Obtaining financial support from your employer is the best way to achieve participation. Other development programs however, such as those offered by state or local organizations, tend to be less expensive. Cost will often be a factor in determining whether or not to participate. The cost of the program should not be a deterrent because I have always believed that one should invest in oneself. With the rise of MOOCs and other affordable online learning options, there is practically no excuse (short of the time it takes to make the investment) to continue learning.

### **Failure is an Option, or, Know Your Limits**

It can be difficult to find the time to develop the skills needed to be an effective leader. Creating that time and space to learn, however, is critical and is one of the most significant investments you can make in yourself. One way to continue learning and developing is through volunteer service. This service may be in professional associations, or religious groups, or civic organizations – whatever organization that does work about which you are passionate and will be able to commit to the work.

Most of my volunteer activities have been with professional associations, at both the state and national levels. I've served on, or chaired, numerous committees, task forces, or workgroups. But volunteering is the easy part. Following through on your commitments may be less easy. Be sure to do what you say you're going to do. By acting on your words you gain the trust and respect of your colleagues and other leaders and this may lead to other leadership opportunities. Managing your reputation and demonstrating your leadership capabilities requires that you volunteer in moderation and do not overcommit your time. Remember that you still have a full- or part-time job at which you also need to perform well. It is crucial also to find the right work/life balance. It means developing the ability to say "no." It is satisfying to be recognized for your work and be invited to participate in new or different activities, even those about which you are passionate, but understanding the level of commitment the assignment will require, in addition to other obligations, will help to make a decision on whether or not to accept the offer. Most people

will understand when you turn down an opportunity if you're honest about why you're unable to do it.

Leaders understand the value of taking risks and can often determine the level of risk involved in an action before pursuing that course. Taking risks, whether personal or professional, can teach you about yourself and what you need to succeed. Some people are afraid of taking risks for the fear of failure, or because the risk may move us outside our comfort zone. But taking risks – calculated risks – can be fulfilling. When evaluating risks, there are several factors one might consider. These factors include:

- Is this risk consistent with my values?
- What other choices do I have?
- What will happen if I don't pursue this course of action?
- What is the motivation for taking this risk?
- What might the expected results of this action be? What will change?
- What will be the effect of this action on others

There may be other factors to consider based on the specific action to be taken, but you may ask these questions before acting on anything that is a perceived risk.

Taking a risk means you're willing to try something new in order to succeed. It also means you are willing to be unsuccessful (to fail?) Failure without reflection is not an option. Even if the action doesn't yield the results you expected, you should analyze the situation to glean any lessons that may prove helpful for the next action. I made reference earlier to my unsuccessful attempt to be elected to the board of a national library association. Although I was disappointed by the election results, I came to realize that I wasn't ready for that role at the time. My mentors and other colleagues continued to provide support and encouragement for what later became my successful attempt, four years later, to become president of that same national library association. I could have thought about that earlier experience and decided never to think about elected office again, but I had a reason for wanting to lead the association and to be involved at that level. When I conducted the risk assessment, using the questions above, I believed I had no choice but to move forward with my candidacy. The potential – and in this case, realized – payoff was worth the risk.

## **Lead**

My experiences have afforded me the opportunity to hold leadership positions in academic libraries as well as in library associations. Some of these positions have come with formal titles of leadership (committee chair, associate university librarian, association president). Others positions without these titles have still enabled me to exhibit my ability to lead. Thinking back to the definition of leadership as demonstrating "behavior that influences people toward shared goals," we can see people at all levels of any organization as potential leaders. I reflect on my experiences with my siblings who wanted to emulate the level of freedom I had, or my mentors who encouraged what they believed they saw in me, or my colleagues who supported me along my journey and I realize that they, too, are leaders. All these people have had a profound impact on my life in leading me down the path I have taken. I have listened attentively, tried to learn a lot, and practiced what I have learned, while also sharing that knowledge with others. These are some of the core qualities I look for in leaders. If asked the question "Are leaders born or made?" I would have to answer,

“Both!” My experience has certainly been shaped by my experience, but who knows, maybe I was born to lead!

#### Reflections – Key Lessons for Leaders

- Bring a leader requires constant growth and development. Take advantage of learning opportunities.
- Listen to, and learn from, life experiences that have an impact on your ability to lead.
- Great leaders encourage and support others who are embarking on their own leadership journey.

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