

INLS 585: Management for Information Professionals

9:00-11:45, Fridays, Manning 001

This course is an introduction to general management principles and practices intended for information professionals working in information organizations. Topics include planning, budgeting, staffing, leadership, organizational change and evaluation, and decision making.

Objectives:

By the end of the course, learners will be able to:

- describe management theories and approaches relevant to managing information organizations,
- analyze their personal leadership styles and goals,
- identify elements and processes used in overseeing organizational budgets,
- apply evaluative best practice principles to design personnel activity and assessment plans,
- use organizational strengths and weaknesses and environmental opportunities and threats to synthesize action plans, and
- harness strategic plans to develop and plan out change initiatives

Instructional approaches used in this course will include lectures, guest seminars, discussion activities, case study analyses, and small group work.

*Appreciation & credit to Barbara Moran, Ericka Patillo, and Tiffany Veinot (<http://www.oercommons.org/courses/management-of-libraries-and-information-services/view>) for ideas on this syllabus.

Instructor profile:

I'm Nina Exner, a part-time doctoral student at SILS and full-time librarian at NC A&T in Greensboro. I have 19 years of post-Masters experience in libraries. My research is on organizational and personal factors in researcher careers and research project success. My doctoral dissertation focuses on university researcher-librarians. I am very active in the North Carolina Library Association, and somewhat active in national professional associations for academic libraries and for research development professionals.

Contact information:

UNC email – nexner@live.unc.edu. This is my preferred form of contact.

Personal email and instant message ID – nina.exner@gmail.com Please keep in mind that communications through Gmail, Gchat, and Hangouts are governed by Google's privacy practices, not UNC's privacy practices. This has significant implications for FERPA regulations about your personal privacy and the privacy of your student records, so use good judgment in what you send through that route.

Office hours – I do not have an office, but I am available to meet 12-1 after class each week. You can also make an appointment and I will schedule to meet with you face-to-face or virtually.

Statement of expectations:

This is a professional class, and I expect professional work and communication practices. Please tell me about concerns so that I can try to address them. The sooner you tell me of a problem, the more likely it will be that I can do something to help you with it.

Be polite to your colleagues – and myself – throughout the course.

Accommodations for assignment delays may be honored in emergency situations, with approval only. If you need accommodation for delayed work submission you must arrange it in advance; unapproved delays in submitting assignments will receive a reduced grade.

Students are expected to conform to UNC guidelines of behavior including but not limited to the Honor Code. Unless otherwise pre-approved, all submitted work is expected to be conducted individually.

Please note! *Studying together is a good idea. Sharing answers or working together on individual work pieces is a bad idea. If it doesn't have multiple authors' names on it, it should not be "group" answered!*

Reading assignments: Readings posted for a given week are for pre-reading. They should be completed before that week's class in preparation for that session. Please read (or listen to or watch, as appropriate) before the start of class. If you need format accommodations made so that readings are compatible with assistive technology devices please let me know as soon as possible so that I can get materials converted to an appropriate format.

The "textbook" is available online:

Hakala-Ausperk, C. (2011). *Be a Great Boss: One Year to Success*. Chicago: American Library Association.

Articles and other supplementary reading will be available through links to UNC's library resources or through Sakai's resources list, other supplementary material will be linked.

Grades:

Grades given in this class represent the UNC guidelines for graduate work:

H – Clear and unusual excellence, greatly beyond what is expected of Master's students

P – Satisfactory performance representing the normal expectations for Master's student work

L – Inadequate work not performing at the level expected of Master's students

F – Fail

The final grade will have four overall components. See next page for more detailed grading information:

Quizzes and mini-essays: 10% total. There will be a "quiz" each day, for 1 pt. each, to a maximum of 10 points. That means that you can miss 2 quizzes without penalty.

Class participation: 20% total. Class participation includes interaction, involvement (in the classroom or on Sakai forums), and contributions to class activities and small-group discussions.

Mid-term project: 25% of the grade is devoted to the mid-semester team plan.

Final exam: 10% of the grade is based on the final exam on terms and concepts presented in class.

Final project: 35% of the grade is devoted to the end-of-semester planning project.

Assignment descriptions:

Quizzes (10% of grade): There will be a quiz or mini-essay each day at 9:05 am. Each quiz is worth 1 point (grades rounded up), to a maximum of 10 points total. Two can be dropped or missed. These are arranged to get some feedback on course progress, and to include some points for reasonably timely attendance.

Class participation (20% of total grade): Participation can take many forms. Learners are expected to engage in class, not simply absorb it. Interacting with and responding to the topic of the day is one component of this, whether by answering open discussion and lecture questions or by posting relevant responses or related materials in the Sakai site. Contributions to in-class activities, simulations, case study analyses, and other team discussions are also part of this grade.

Mid-semester **departmental initiative project** (25% of total grade): Learners may work individually or in pairs to create an annual Action Plan for an imaginary department. Learners will show the planning process: plan a new initiative, describe the department and organization, design goals for the initiative, and create an Action Plan for their department. More details to come by Week 5.

Final Exam (10% of total grade): The final exam will last one hour and consist of multiple choice questions plus one short essay. The goal is to be sure that all learners have absorbed basic management terms and concepts. It *is not open* book nor open note.

End of semester **planning project** (35% of total grade): Learners must create a major administrative plan of their choice for an organization of their choice, describing strategic roles and how they connect to the organization and environment as well as practical plans and support documents such as policy pieces or assessment forms. Details to come after mid-term.

Mid-semester project: Department-level plan

This project may be done individually or in pairs; larger groups may be possible with instructor permission. The purpose of this project is to create a realistic one-year action plan that a IS or LS department might develop to implement one *departmental* initiative. Examples could be adding a new service/product (such as implementing cloud document storage, starting social media marketing, or implementing patron-driven acquisitions) or building up an existing service (such as an outreach push, expanded help desk services, or building subject guide content).

This project should be written for a department of 3-6 members, in an organizational type of your choice (as long as it is within LIS and related areas). The nature of the organization and plan will affect what is appropriate to the content, so there is no single format available. At minimum the project should include the following:

1. A one-page description of the department and its function in the organization
2. The Action Plan your department is implementing. **This is the heart of the assignment and should show the most analytical thought**, but make sure that the departmental description, outcomes, and jobs describe the context effectively. At minimum you should describe:
 - What the action plan is and what the department will do as part of this plan
 - Why this should be done, including decision-making issues such as...
 - the benefits to the larger organization, and
 - the rationale based on issues and practices in the field
 - How the changes will be managed by the department head or project lead, such as:
 - Building team buy-in
 - Getting input into the process from various constituents
 - Anticipating problems
 - Accounting for existing and changing workloads
 - The stages that must be gone over and when each will happen during the year
 - Who is responsible for which parts of the implementation
3. The goals and outcomes that the manager and the team are anticipating
4. An appended list of department members/employees and their organizational roles, with job descriptions (Note: you are welcome to base these on job descriptions from job advertisements or other resources, but please cite them in some fashion to give due credit to the originators of materials)

The Big Project: Major organizational initiative

This project may be done individually or in pairs; larger groups may be possible with instructor permission. The more people, the more content is expected. The purpose of this project is to create one organization-level, multi-year planning item. Although most organizations implement multiple big projects in different stages, this project should focus on one type of project or plan. Examples might be a building construction or renovation project, creation of a full strategic plan, major system migration (new ILS, CMS, HR suite, etc.), large grant proposal, organization-wide restructuring project, business plan for a start-up company, fundraising campaign, or any other organization-level plan.

Some plans such as grants and business plans have a specific format that is defined by the type of plan. But for plans without a pre-set structure the following elements should be included, either in specific sections or with the elements worked into the plan:

1. Executive summary: a succinct one-page overview summarizing the plan's major points
2. Project description and rationale
3. Organizational overview
4. Management strategy
5. Project implementation stages
6. Personnel/teams involved, and development needed
7. Constituent communication (marketing, buy-in, and/or consensus approaches)
8. Budget and funding
9. Outcomes and assessment plan
10. Follow-up and long-term concerns

In many cases there will be visual elements needed such as floor plans, system diagrams, flow charts, or other design elements. These are often key components so please give them due attention. Most plans will require tables and charts of some sort! These elements are important to communicate the overall concept of the plan. This is not a research paper (although some literature should be incorporated), so please don't write all text. Creative design is encouraged!

Project rubrics:

The idea behind the two planning projects is to attempt to create the kinds of plans that you will be making in the work environment. Even if you are not a manager, it is normal for information workers to be committee members or team members working in groups to create organizational plans. These should be written with a practical eye towards your work environment, incorporating theory but focusing on real-world practice. Treat them as practice for something that you might really do in your career.

	Below expectations (L)	Low-but-passing performance	Entirely satisfactory!	Unusually exceptional (H)
Basic concept	The plan reflects only a non-professional (layman) concept of information organizations	The ideas behind this plan accurately reflect the basic structures and roles of information organizations.	The plan shows a professional view of information work, information organizations, and management.	This futurist plan effectively integrates current and coming ideas in the profession and its management.
Organizational integration	The plan fails to include context, or describes the context and planning components disconnectedly.	The plan describes basic organizational context factors to which parts of the plan are responding, with some logical connection.	The plan integrates well-reasoned organizational contexts with effective planned responses in a clear, sensible way.	Exceptional insight into contextual and managerial factors in information organizations is assimilated throughout.
Integration of research, theory, and/or evidence	The plan uses only rudimentary or unreliable sources of evidence and ideas.	Appropriate benchmarks, theory, statistics, or other evidence is included for comparison.	The plan effectively pulls in sources of data or theory that strengthen the plan's usefulness.	The plan makes outstanding use of insightful sources well-tied to the plan and organization.
Analytical strength	No synthesis of ideas or analytical effort is included.	Ideas flow in a reasonable way, creating an effective, actionable, synthesized whole.	The plan shows serious thought and analysis through the integration of planning, course concepts, & sources	Remarkable insight into the forces and expectations of information organizations is demonstrated.
Professional preparation and product	The plan is sloppily prepared with significant typos and poor use of grammar.	The plan is written and proofread accurately, with a comprehensible layout and style.	Good composition, clean use of language, appropriate style, and graphical elements integrate well throughout.	This elegant plan is composed and presented beautifully, like professionally-produced corporate materials.

Course Schedule:

Typically you will have four items per week, which will be a mix of readings and watchings. Roughly, each 2 hour and 45 minute class session will consist of:

- a brief review,
- a starting quiz, usually based on terms and concepts from the assigned readings
- a lecture, with a break before/during/after depending on the class session timing,
- a set of group exercises and/or discussions, and
- a brief closing review and action items

No plan survives its encounter with reality. Please treat all plans as tentative. Changes in plan that affect you directly (such as new reading assignments) will be sent out to everyone.

SCHEDULE

August 26	Introductions, course design, career planning discussion
September 2	<p style="text-align: center;">Management</p> <p>Read “Be a Great Boss” Chapter 1 (Attitude) “Be a Great Boss” Chapter 2 (Success with Stakeholders) Henricks, S., & Henricks-Lepp, G. Desired Characteristics of Management and Leadership for Public Library Directors as Expressed in Job Advertisements. <i>Journal of Library Administration</i> 54(4), 277-290.</p> <p>Watch Management Styles Explained http://libproxy.lib.unc.edu/login?url=http://fod.infobase.com/PortalPlaylists.aspx?wID=102632&xtid=44682 or http://fod.infobase.com.libproxy.lib.unc.edu/p_ViewVideo.aspx?xtid=44682</p>
September 9	<p style="text-align: center;">Personnel and Personnel Evaluation</p> <p>Read “Be a Great Boss” Chapter 3 (Staffing) “Be a Great Boss” Chapter 4 (Communication) “Be a Great Boss” Chapter 5 (Customer Service) Campbell, J. P., & Wiernik, B. M. (2015). The Modeling and Assessment of Work Performance. <i>Annual Review of Organizational Psychology and Organizational Behavior</i> 2, 47-74. doi: 10.1146/annurev-orgpsych-032414-111427</p>

September 16	<p style="text-align: center;">Planning part 1 – goals, environmental scans, strategy</p> <p>Read “Be a Great Boss” Chapter 6 (Planning) “Be a Great Boss” Chapter 7 (Friends and Allies) Hong, E. (2009). Information Technology Strategic Planning. <i>IT Professional</i> 09(6): 8-15. Ployhart, R. & Hale, D. (2014). The Fascinating Psychological Microfoundations of Strategy and Competitive Advantage. <i>Annual Review of Organizational Psychology & Organizational Behavior</i> 2014 (1):145–72.</p>
September 23	<p style="text-align: center;">Staffing and Team Development</p> <p>Read “Be a Great Boss: Chapter 8 (Training) “Be a Great Boss” Chapter 10 (People) Kozlowski, S.W.J., Mak, S., & Chao G. T. (2016). Team-Centric Leadership: An Integrative Review. <i>Annual Review of Organizational Psychology and Organizational Behavior</i> 3, 21-54. doi: 10.1146/annurev-orgpsych-041015-062429 Triandis, H. C. (2006). Cultural Intelligence in Organizations. <i>Group & Organization Management</i> 31(1): 20-26.</p>
September 30	<p style="text-align: center;">Project Management</p> <p>Read Jerbrant, A. (2013). Organising project-based companies. <i>International Journal of Managing Projects in Business</i>, 6(2), 365-378. doi:http://dx.doi.org/10.1108/17538371311319070 Massis, B. (2010). Project management in the library. <i>New Library World</i> 111 (11/12), 526-529.</p> <p>Watch ICT Project Management http://libproxy.lib.unc.edu/login?url=http://fod.infobase.com/PortalPlaylists.aspx?wID=102632&xtid=47484</p>

Departmental-level planning project is due

Sunday October 2nd

By midnight

Please submit your project to me by e-mail at nexner@live.unc.edu

October 7	<p style="text-align: center;">Budgeting</p> <p>Read “Be a Great Boss” Chapter 9 (Funding) Linn, M. (2007). Budget systems used in allocating resources to libraries. <i>The Bottom Line: Managing Library Finances</i> 20 (1), 20-29 Willmott, K., & Wall, A. (2012). Responding to Fiscal Tensions and a Changing Educational Context: A Librarian Entrepreneur. <i>Journal of Cases in Educational Leadership</i> 15(4), 85-95.</p> <p>Watch Understanding Financial Information http://libproxy.lib.unc.edu/login?url=http://fod.infobase.com/PortalPlaylists.aspx?wID=102632&xtid=94141</p>
October 14	<p style="text-align: center;">Funding</p> <p>Read Carver, C., Klein, C. S., & Gisting, M. (2015). “What’s Under Your Bed? A Fundraising Fiasco.” <i>Journal of Cases in Educational Leadership</i> 18(2), 157-166. Roberts, B. & Hoover, C. (2014). Waging a successful library funding campaign: A case study. <i>Library Management</i> 35 (3): 164-174.</p> <p>Watch “Developing a Persuasive Proposal: Crowdfunding and Grants” http://fod.infobase.com.libproxy.lib.unc.edu/p_ViewVideo.aspx?xtid=55667 or http://libproxy.lib.unc.edu/login?url=http://fod.infobase.com/PortalPlaylists.aspx?wID=102632&xtid=55667</p>
☺ Fall break ☺ No class October 21	
October 28	<p style="text-align: center;">Decision making</p> <p>Read Hess, J. D., & Bacigalupo, A. C. (2013). Applying emotional intelligence skills to leadership and decision making in non-profit organizations. <i>Administrative Sciences</i>, 3(4), 202-220. doi:10.3390/admsci3040202 Yu, B., To, W., & Lee, P. (2012). Quality management framework for public management decision making. <i>Management Decision</i> 50 (3), 420-438 Liberatore, M. J., & Luo, W. (2010). The analytics movement: Implications for operations research. <i>Interfaces</i>, 40(4), 313-324. doi:10.1287/inte.1100.0502</p>

November 4	<p>Planning part 2 - policies, operational processes, and projects</p> <p>Read</p> <p>Fitsimmons, G. (2011). The policy/procedure manual, part I: Making and abiding by good policies. <i>The Bottom Line</i>, 24(4), 233-235. doi:10.1108/08880451111193343</p> <p>Fitsimmons, G. (2012a). The policy/procedure manual, part II: Procedures that complement good policies. <i>The Bottom Line</i>, 25(1), 13-15. doi:10.1108/08880451211229162</p> <p>Fitsimmons, G. (2012b). The policy/procedure manual, part III: Organizing the manual. <i>The Bottom Line</i>, 25(2), 56-59. doi:http://dx.doi.org/10.1108/08880451211256360</p> <p>Fitsimmons, G. (2012c). The policy/procedure manual, part IV: Writing the manual. <i>The Bottom Line</i>, 25(3), 95-97. doi:http://dx.doi.org/10.1108/08880451211276520</p>
November 11	<p>Assessment</p> <p>Read</p> <p>Reynolds, R., Walker, K., & Speight, C. (2010). Web-based museum trails on PDAs for university-level design students: Design and evaluation. <i>Computers & Education</i>, 55(3), 994-1003. doi:10.1016/j.compedu.2010.04.010</p> <p>Smith, G. A., Tryon, H. D., & Snyder, L. B. (2015). Developing an academic library assessment plan: A case study. <i>Performance Measurement and Metrics</i>, 16(1), 48-61. doi:10.1108/PMM-12-2014-0045</p> <p>Tatarka, A., Chapa, K., Li, X., & Rutner, J. (2010). Library assessment plans: four case studies. <i>Performance Measurement and Metrics</i> 11(2): 199-210.</p>
November 18	<p>Organizational Change</p> <p>Read</p> <p>Coblence, E., Normandin, F., & Poisson-de Haro, S. (2014). Sustaining Growth through Business Model Evolution: The Industrialization of the Montreal Museum of Fine Arts (1986–2012). <i>Journal Of Arts Management, Law & Society</i>, 44(3), 126-144. doi:10.1080/10632921.2014.936077</p> <p>Brown, S. (2011). Bringing about positive change in the higher education student experience: A case study. <i>Quality Assurance in Education</i>, 19(3), 195-207. doi:10.1108/09684881111158027</p> <p>Watch</p> <p>Managing Change Successfully http://fod.infobase.com.libproxy.lib.unc.edu/p_ViewVideo.aspx?xtid=49936&tScript=0 or http://libproxy.lib.unc.edu/login?url=http://fod.infobase.com/PortalPlaylists.aspx?wID=102632&xtid=49936</p>
November 20 due date (next page)	

The big planning project is due Sunday, November 20th by Midnight!

December 2

Leadership

Read

“Be a Great Boss” Chapter 11 (Leadership)

“Be a Great Boss” Chapter 12 (Your Future)

Hartog, D. N. D. (2015). Ethical Leadership. *Annual Review of Organizational Psychology and Organizational Behavior* 2, 409-434. doi: 10.1146/annurev-orgpsych-032414-111237

Walumbwa, F. Christensen, A., & Hailey, F. (2011). Authentic leadership and the knowledge economy: Sustaining motivation and trust among knowledge workers. *Organizational Dynamics* 40(2): 110-118. doi: 10.1016/j.orgdyn.2011.01.005

Final exam

Online, opens 12/8, due by 12/10 at 11 am