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Long-range planning across generational lines

Eight tips to bridge the differences

Ahot topic in recent library literature is generational differences, particularly those between Baby Boomers and Generation Xers. The May 2004 *American Libraries* cover story, addressing what Generation X needs to lead, resulted in frustrated responses from some Generation X librarians and a follow-up article addressing the generational tensions. In addition to numerous feature articles on this topic, *Library Journal* debuted the "NextGen" column in January 2004 to provide an ongoing platform for discussing these issues.

Before we go any further, let's take a quick look at the four major generational categories: Traditionalist, Baby Boomer, Generation X, and Millennial. *Traditionalists* are loyal employees, committed to the institutions for which they work. *Baby Boomers* are competitive and idealistic, a generation that has been able to focus on themselves. *Generation Xers,* by contrast, are skeptical and self-reliant. They have seen their parents divorce and institutions fail. Finally, *Millennials* are technologically savvy, diverse, and have been raised with a global media perspective.[1]

These categorical differences have been examined in the broader context of generational characteristics, as well as the qualities needed for new leadership and management to replace the retiring Boomers.

William M. Curran addressed the need for succession planning in light of these impending retirements, the related loss of collective knowledge and expertise, and the relative scarcity of younger middle managers to fill these leadership roles.[2] Carolyn Wiethoff characterized the unique attributes of Generation X and Generation Y (Millennials) to assist Boomers in understanding and managing colleagues from these generations.[3] While the differences between Boomer managers and Generation X employees have been thoroughly examined, what happens when the tables are turned and Generation Xers are leading?

Cross-generational planning

In the fall of 2003, the Regis University Libraries began developing a long-range plan. The Long Range Planning Steering Committee (LRPSC) was composed of faculty and staff from across the library and included representatives from other units of the university. We were selected to be the cochairs; one of us was new to the university and participated in strategic planning at another institution, while the other was a relative long-timer with seven years of experience at the library.

Despite the difference in backgrounds, we are both Generation Xers, and gradually discovered the generational differences playing out in our planning process. Through shepherding the long-range plan from draft stages to eventual adoption, we have observed a number of points that may prove useful to

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others embarking on a cross-generational planning process.

1. Be respectful. Respect what has gone on before you, both your institutional history and your colleague's experience. Generation Xers like change, while Boomers favor tradition. The challenge is to balance the weight of tradition with the promise of a new approach and to not get sidetracked by discussions of how previous attempts to change were not successful.

2. Encourage broad representation. Employees from all departments, staffing levels, and generations should be involved in the planning process. Ensure that your steering committee or other coordinating body is representative of the library as a whole. Our committee was not composed with generations in mind, and, as the only Generation Xers on board, we occasionally felt frustrated when trying to bridge generational differences.

3. Have a timeline. It is important to build a timeline for your long-range planning process, and it is even more important to actually follow it. Building in some flexibility allows for the ebb and flow of the process, but sticking to a timeline forced us to come to consensus when generational differences would have otherwise derailed the process. Coincidentally, our planning timeline ended up aligning with the university's strategic planning deadline (which was announced after we began our process), thus giving us another reason for staying on task.

4. Mix it up. Provide a variety of opportunities for employee's voices to be heard. All employees should have the opportunity to share their knowledge and provide input in the process. Accommodate different learning and participation styles with large group, small group, and one-on-one situations for input. We held "listening sessions," where employees were organized based on whether they were faculty or staff and supervisory or nonsupervisory.

An outside facilitator from another university department led the sessions, using as her foundation a set of questions compiled by the LRPSC. Providing a variety of opportunities also allows generational perspectives to be shared, as different settings may be more conducive to the range of generational preferences.

5. Consult ACRL standards. The standards represent what our profession values and may shine a light on areas that need improvement. If a Boomer is concerned about a proposed change, the standards can help bridge the gap.

We found that pointing to the standards made proposed changes more credible rather than being just another crazy idea the Generation Xers created over their morning café au laits.

6. Plan for the future. Long-range planning should incorporate succession planning, which not only includes planning for management changes, but also for key positions within your organization. Generational differences may affect employment and turnover.

Succession planning that also provides for re-education will appeal to Generation Xers who value learning opportunities, while Boomers will appreciate how succession planning explicitly values their career accomplishments and contributions.

7. Gather data. Both internal and external data gathering should provide valuable input in your long-range planning process. External data gathering can occur through surveys, focus groups, and other assessment tools. Internal data gathering can occur through a variety of formats, such as an all library meeting, small groups, departmental discussions, and the listening sessions previously mentioned. Like our professional standards, data can support proposed changes that might otherwise be questioned on the grounds of generational differences.

8. Get outside opinions. Include other college or university members on your steering committee, such as faculty that

fishing for a particular response, and in doing so recognized how many times I posed the latter when I thought I was asking the former. I felt sympathy for my fellow faculty when I saw them struggle with the difficulty of allowing silence to stretch out for people to have a chance to think about such questions before answering them. Whatever one's age, one doesn't wish to appear the fool in public!

How to find out what students need

Even without the magnificent opportunity of a sabbatical, there are many things we can do to become more familiar with student information needs in our classes. Ask if you can sit in on a session or two of a class you will be instructing in the mysteries of library research before you offer your session. Talk to students you see in those classes and ask them about their preferences and challenges in finding information; you can encounter them in the dining halls, in performances, in clubs or interest groups, and in the stands of the sports arenas as well as in the library and the classroom. Take the time to look at the texts for those classes; the results can be enlightening, to say the least.

It might have been very interesting to use the Web sites from the text for the drama course in a library exercise to evaluate Web pages. Review your instructional material with an eye to media literacy as well as information fluency. If you have a center for teaching and learning on your campus, see if they have a peer observation program and ask to be included in it as both an observer and as one who wishes to be observed. Sit in on instruction sessions of your fellow teaching librarians and really focus on all the aspects that impinge on learning: physical space, movement, technology, content, delivery. If possible, do this for classes that are unfamiliar to you or which cover unknown material. The more we can put ourselves in the place of "learner," the more we will experience the needs of learners, and the more effective our teaching will become. ℵ

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serve on your library advisory committee, library-friendly IT staff, or a representative from the provost's office. They will serve as outside advisors and will broaden your perspective in the planning process.

A final tip for any long-range planning process is to identify those issues that don't require paradigm shifts and are easy to solve. We developed a list of such issues and addressed them before turning to the larger questions of the newly adopted long-range plan. This approach preserved the momentum of the planning process and allowed for the quick and decisive actions that all generations appreciate.

Epilogue

Despite the generational divides that needed to be bridged during the long-range plan's development, the process has already been deemed a success. A university-wide meeting that was supposed to focus on the long- range planning efforts of all units was modified to focus on the library's plan, as it was recognized by the provost as the model of how plans should look.

Within the library, the generational lessons learned during the planning process led to thoughtful consideration of how the plan's implementation group would be composed. Along with other diversity concerns, we made a conscious choice to balance the generational representation. So far, so good.

Notes

1. For further exploration of generations in the workplace, see Lynne C. Lancaster and David Stillman's *When Generations Collide: Who They Are. Why They Clash. How to Solve the Generational Puzzle at Work* (HarperBusiness, 2002).

2. William M. Curran, "Succession: The Next Ones at Bat," *College & Research Libraries* 64 (2003): 134–40.

3. Carolyn Wiethoff, "Management Basics: Managing Generation X," *Indiana Libraries* 23 (2004): 53–5. ℵ