Transform Yourself and Your Library : with some Handy Tips and Tricks using my Toolbox

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Working in a special library, whatever the subject matter, can be a rewarding experience, but quite often it places many demands on you. You are the finance person, the ordering, cataloguing, promoting, marketing, reference, and on and on. Depending on your library, you may specialise in a few of these areas, we all have our own strengths and weaknesses. I know I prefer to get out there and talk to customers and do the technical work, rather than pay the bills and do cataloguing. This is when it becomes a challenge to keep all the cogs turning at the one time to keep your service looking efficient.

I don't claim to be an expert in this area, hence, I won't be presenting facts, figures and research. This is more a grounded example from my own experience and learning in my library profession. I'd like to offer you some of the tips and tricks that I have in my repertoire, I call it my toolbox, that may help you. Your learning today may trigger new tips you may develop for yourself. You can either use my tips and tricks or develop your own, and there is also a lot of good reading out there that you can delve into. You may not always stay on track with these tips, but I find it can help you to focus. If I get off track I have moments where I recognise: Get it back on track! And, most importantly you can do all of the following without needing to spend any money.

I believe it's important to know how to handle yourself (personal management) and your time. You may feel you have many hats on at the one time, but it's important to smooth those waters to ensure the hat wearing doesn't become a debacle, but it actually looks like your repertoire is flowing smoothly.

What's in the toolbox for today?

- Information Organisation
- Colour coding
- Emails
- Schedules
- Saying No
- Listen to your clients
- 80/20 rule

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- Networking in your organisation
- Policy and procedures...
- Technology to make your life easier – intranet, blogs and wikis
- Improve yourself
- Mentoring students

I'd like to give you an outline of the company I work for, the team I work in and my own work environment. I have worked for just over two years at a private consulting company called Urbis. When I joined we were called UrbisJHD, as a result of the merger of two companies. There were 180 staff, we had offices in Melbourne, Sydney and Brisbane. The company now has about 280 staff, with offices in Perth and Dubai as well.

Our company does consulting work to help our clients with urban transformation, that may include retail, property, town planning, social planning. An example of a couple of projects we have done is the redesign of Melbourne Docklands, giving trade area analysis advice to a certain supermarket when they wished to open in a specific suburb, and that may involve giving the supermarket a map showing all the other supermarkets in the area and giving an employment and income profile of the people living in that area. We help to design palaces and cities in the United Arab Emirates, we have worked with a client on the social impacts of the dredging of Port Phillip Bay. We also value office buildings, like 700 Collins Street. We help with social advice regarding the Government's 'Bringing them Home Report' for the Indigenous community. And we have recently won work in Libya, which is pretty amazing. And that is just the tip of the expansive project iceberg that Urbis is involved in.

I am in the Knowledge and Information Management Team (hereafter K&IM), employed as the Library and Intranet Manager. I was originally employed as the Corporate Librarian, but soon took on the Intranet portfolio after the original developer from the graphics team left. I believe the intranet is much better suited to our portfolio.

Within the K&IM team we have a National K&IM Manager who oversees all the projects and works with staff on K&IM. He reports to the Chief Executive Officer. The K&IM Manager is my boss and is not from a library background. There is a Data Manager who helps to extract data, numbers and publishes reports, such as Retail Averages; the Data Manager also helps me with intranet IT work. There is a GIS (Geographical Information Systems) Team that works on producing the maps that I mentioned for the certain supermarket mentioned before. The GIS is also involved in many different projects, including extraction and provision of the Census 2006 data.

Then there is my portfolio of managing the library and intranet for the company. I have one part-time Library Technician in Melbourne who helps with cataloguing and other queries, and a one day a week intranet support person who helps with intranet development.

Melbourne had the original and only hardcopy library. And once I joined I created a hardcopy library in Brisbane. I am still in negotiation with the Sydney Library over their development. They currently don't understand why it would be important for me to catalogue the few thousand books they have on their shelves. The Dubai Office has a very tiny library that is modelled on the Melbourne Library. And since joining, I created a national electronic storage system, that is shared between all the offices, and items are linked to the library catalogue.

The rapid rate of growth means that my work is constantly evolving and changing, and I must move with that change rapidly.

Hence, I also need to be very organised with my work and or delegation to staff.

1. Information Organisation.

Many companies need help to manage the information that is created within in it. Information organisation may include reports that are generated, project files, archived files and information, library reports, photos, and intranet. Our company needed a business solution for this to allow them to organise and give staff better access to their information. And when I commenced just over two years ago, the state of the information was in a mess. People were crying out for help and needing solutions to their problems. I estimate that the company was about 5 to 10 years behind others with regard to storing electronic information and they had not merged their libraries.

How do you go about solving the information solutions for a company such as Urbis? Many ways: talk to staff, ask them what they want, they will tell you; once you capture information and store it, say in a library catalogue, promote it; tell people about it by email and other communication means; gain the support of staff who can help you get your jobs done. For our team it has been a "slowly slowly" process, one step at a time, but currently we are now seeing the rewards of our information solutions.

I touch on information organisation to show the range of library jobs that are out there. Many are unadvertised and companies are in need of information solutions to help them manage their information better. Maybe your own company needs a hand. You will find your librarian skills will match the skills needed to provide business solutions to these sort of problems.

2. Colour code your folders.
Have you got too much junk or piles of paper sitting around on your desk? Do you need to clear the clutter?

If you do, you'll be able to work more efficiently if all those bits of paper have a home, and when you are doing the required job, e.g. ordering information, pick up the specific folders and start your work. This is how I organise my work, I use a toast rack, ie. yellow for pending orders, orange for completed orders, red for reconcile with credit card. I find by putting my work in folders I'll feel more organised and when I'm working on a specific aspect, I'll pick up that folder, instead of saying "mmm, now where did I put that bit of paper?" My pieces of paper and folders are like an ebb and flow on my desk at times, I'm not perfect, When the folders and paper get out of hand, I try and recognise when it's time to pick up the pieces and become neater again.

3. Emails

Q. Who reads their emails three times a day?

Q. Who does it more often than that?

There is a lot of talk out there about how to handle your emails. Many people say, only check your email twice or three times a day, like, when you get to work, lunch time and when you go home. This wouldn't work for me, I have tried it. My clients contact me and each other, preferably by email. I receive on average, about 200 emails a day, and they are all pretty important, to varying degrees, from people in the Melbourne Office or other interstate Offices or my library colleagues. Due to the nature of our company I cannot make demands on people that you "must contact me by phone".

How do I handle this? I do have the email flash up on my screen when it comes in, as I can quickly see if it's an emergency. Another way to handle my emails is that I have filed them into email folders, called bills to pay, bills paid, follow ups, cataloguing. I move items out of my inbox and put them into their appropriately named folder for quick retrieval later. Ask IT for a separate email address for specific needs, e.g. I have a library and an intranet email as well as my own. This means that I can clear more of the clutter and know what needs attention now and what can be attended to later. Library email news subscriptions come into the library folder, intranet work for the team goes there. I check these folders only a few times a day.

Once the work is in the intranet folder, I colour code them if I'm working with others on the same email public folder, and I check off the work with a tick, as it's completed.

4. Schedules: to have or not to have?

Some people work really well with having each moment of the day scheduled for them. It's up to you how you work, if you work well with a schedule, I'd make one up, e.g. 10am Monday, inter library loans, 11am, orderings, 12 midday, research, 1pm, lunch.

I have tried it but I don't work that well with a schedule. I'll find that Friday will be my ordering day and it could be blown right out of the water with ten questions coming in within half an hour, which instigates a whole lot of work; then I know on Monday I must get to the ordering. I work with a loose schedule, Tuesday afternoon I might do some cataloguing work, Thursday mornings are the team meetings, Friday morning is information ordering, Tuesday and Friday afternoon is the intranet. But usually it won't work like that. As many changes happen rapidly, so I just move with the punches.

I evaluate what's happening at work and do what's appropriate for the specific time. I need to be conscious of how to pick up that work with regards to what was needed to be done, so if I didn't do the ordering on Friday, I'll come into work on Monday knowing that needs a priority. Ask others how they handle their schedules, as they might have ideas to help you.

Another tactic is to have a brain storm on Monday about what you want to accomplish for the week, and on Friday evaluate what you got done. This shouldn't take too long, maybe about 10 or 15 minutes each.

5. Scheduling and Saying No.

Sometimes you will need to say No, or schedule the work. We can't always do everything and be everywhere at once. Librarians tend to have the door open, and have a high level of contact service. Are other people available every moment of the day in your workplace? IT or graphics will tell you they are busy and can do the work on a specific day, or they may not give you an estimated time frame. I'm not saying do what they do, but just evaluate the environment and work out where you feel comfortable.

Sometimes you may have to say No (politely), or ask, when is your job needed, and when they would like it by? Then give the person an estimated date of completion. If you do that, make sure you follow up with them and let them know the job is done.

Sometimes you may need an hour away from your desk so you can get the library planning done. Make arrangements to pass notification on to allow people to come and get you if there is an emergency. But, I'm always ready to drop work if it's an emergency, it tends to go with the library and intranet territory. So, it's pretty much a juggling act to ensure you are working to the best of your abilities and your availability.

6. Listen to your clients.

I go out there and spend time talking to my clients. I ask them what do they want from my service. Ask them, as you'll be surprised at what they say. They might verify what you have been doing is right on track or they might suggest something altogether different.

I have sessions where I invite staff and offer them breakfast and then ask them really open questions about what they think about the catalogue, the intranet, and how it can do better. I work with some library "sparks", those who have an interest in my service, they understand information and are keen to give me feedback. I call them my pseudo librarians for a bit of fun. Do they want the library display in the kitchen where you have put it for years or would they use it more if it was put in their work area? Ask them, you'll be surprised what they will tell you.

Market in your staff's language, not yours. I let people know that I added a new item to Infocat, instead of saying I have catalogued a new item into the library catalogue. Talk their talk so you are relating to them.

7. Networking in your organisation.

Get to know the movers and shakers, those that can help you get done what you need to get done, those that will support your service, those that will promote it amongst their own colleagues. Get to know your graphics team, they can help with all your advertising, reports and any other needs. It's good to make use of your graphics team as they can also bring your company's branding onto your library portfolio. Get to know your IT guy or gal. They could help with your intranet, website, wiki or blog technology or anything else that will make your service really stand out.

As mentioned before, I work with both library and intranet sparks. By that, I identify those who are keen on say, library. They are the ones who will chat to me and give me ideas about how we should store our information. When I identify those people I invite them to meetings, breakfasts, focus groups. When I throw a few of them together, we get lots of ideas happening. I don't focus on just this group, as I do speak with a wide variety of staff, but recognise that sparks can help to move my service forward.

Host morning teas in your library. In my current library I can't do that as it's too small, but in the past I have hosted many morning teas in the library. Make sure the morning tea is relevant and not fickle; it's a great way to show off your library and get to know people. And also to make them feel comfortable to return to your library. Run competitions for your service, it will create interest and maybe generate more users of your collection.

The librarian is one of the privileged few who knows everything that's happening in an organisation, but remember to keep the things you learn confidential. People confide in the librarian. Quite often I hear confessions from my staff. Keep the confidentiality and trust what's happening, so they know they can come to you again in future. And don't get upset when books are overdue, just work out a constructive way to solve the problem, together.

I once asked my staff in an information session how they found out what was happening in the company, and I thought they would say "oh, the intranet". Well I wanted them to say that, but they named someone in particular, and I thought we still have a lot of work to do with the intranet. And one last thing, don't gossip about others.

8. Policy and procedures

Does your library have a policy and procedures for doing things? I imagine many small libraries do not have policy and procedures, due to a number of factors.

Big libraries have very rigid policies and procedures, so you are in an advantageous position where you can have some fun and write your own. If your organisation allows this to happen. Do you have all the information about your service in your head? Do you find it frustrating when someone rings you, but you don't know how to answer the query?

Policy and procedures can help you to refine yourself, others on staff and all your respective tasks. It can give your collection some direction and also help you communicate better to your clients about what your service does for them.

A policy is really a statement about your service and why you are going to do it. Procedure is more an action, a way of doing things or how to do something.

Take time, maybe an hour a week, to work on your Policies and Procedures. Sit down or go to another room and nut out some broad aspects of your service: cataloguing, acquisitions, reference work. And then break a specific area down further, e.g. in acquisitions, how to purchase, what I will buy, what to do when the item is received.

If there is only you, allow some non-library staff in the library access to the Policies and Procedures, in case you are away and other staff need to know something. I do this with my team, and if someone asks about getting access to some passwords, other staff can provide the answer for them.

How do you store your Policies and Procedures? Some places I have worked store it in a database, or in a word document. This sometimes ends up being many word documents and it's difficult to search. I use a wiki to add all my policy and procedures.

9. Technology to make your life easier.

Technology can be an ideal platform to both deliver and promote your service to your users. Technology can also help you to streamline work, making your service more visible and easy for staff to use.

WIKI – we use a wiki for our entire K&IM Teams procedures. It's an easy-to-use structure with the front page being a summary of all our teams' items. Then as you progress, it drills down further into the library area. I can't publish our wiki due to confidentiality, but there are plenty of wiki examples out there. We use Mediawiki which is a free software tool, that we downloaded to our server and tweaked according to our needs.

LIBRARY PORTAL - I have a blog (BLOG) on my library portal. I don't call it a blog to my colleagues, it's called "Get the Edge" and they see it as a news and information service. If I used the word blog with my colleagues they would be scared off by the technology work and not be prepared to read the information on my site. Since its inception, I have about 60 hits a day on my library portal site. The technology we use for the blog is Wordpress, and it's another free software tool which you can download from the web to your own server.

INTRANET – Luckily I can also have access to the intranet to help my colleagues with their information storage and retrieval needs. The intranet was primarily used for the phone list, but it's slowly developing to be an authoritative source of company information. But we still have a long way to go with it.

10. Improve yourself.

This can help your service run smoother as you will be learning more about yourself and your service. There are a number of coaches around who can help you with your career goals or other growth needs. Get involved with your professional associations, get involved in ALIA or LIANZA, write papers, join a committee. For example, I am involved with the Vic Specials group. I went to The Aurora Leadership Institute in Thredbo earlier this year, and when I returned I could see things in a different light, i.e. with my scheduling, handling my emails and doing tasks. I am on the RMIT School of Business Information Industry Advisory Committee, which is a great way to increase your knowledge and networks and give back to your profession. By improving yourself, it will flow on into the services you provide to your clients. Try it, you will be surprised at the results.

11. Mentoring students.

Students can help you get work done that you have been unable to complete on your own. You can host a student for either a three week placement or for the life of a special project. Mentor your students in career goals and aspirations or mentor each other, talk about your goals and career expectations. Make it a two-way relationship. Mentor the student, be interested in what they are learning, as they can show you the way some of the courses are going and evolving. For example, some have new subject such as information architecture and knowledge management. Take them on library tours, check their resume, give them job interview tips and tricks, ask them what they want to do in their career, hook them up with like-minded people. Or share them with another library, so it's not as long for you if you don't have the time. I share my part-time staff member with the Athenaeum Library, situated in the Melbourne CBD, and we are considering sharing a student in the future, if needed. For example, if we don't have time to host the student for three weeks, we'll split that time in half at each library.

12. The 80/20 rule.

A man called Vilfredo Pareto (1848-1923) developed the Pareto Principle, where 80% of the land in his country was owned by 20% of people. He then went on to prove that the 80/20 rule can be applied to other situations of cause and effect. The 80/20 rule is something that can help you focus on what's really important at the moment. It helps you to put less stress on the unimportant and focus on what needs to be done now. You will find you have more time to think about the other fun things in life, instead of thinking about those "lists".

When I got home I used to have all these things on my mind, plus more: put all my professional development together; write a paper for a conference; clean up the computer room; write on my blog; do some work on the website. Once I started listing the tasks I could target the most important thing that was a must, i.e. write a paper for a conference. I would only think about that. The others will happen, I thought, but I'm not spending a lot of my time stressing on everything; that is100% of my time and concentration. If you focus on the 20% you will be surprised that the other work will follow without you having to think too hard before hand.

I found this really hard at first, as I reasoned that I couldn't forget about everything that needed to be done, I kept feeling tired, drained and I wouldn't get everything done in the one night as it was too unrealistic. I practised the 80/20 rule a few times and then found that once I relaxed and let it happen to watch the outcome, it was a marvellous result.

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