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Elisabeth Knight, Nancy Richey, and Roxanne Spencer, "Coping with the Short Goodbye: Handling Unanticipated Change" (2010). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284314847>

COPING WITH THE SHORT GOODBYE: HANDLING UNANTICIPATED CHANGE

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ABSTRACT

Every administrator or manager has to deal with the loss of personnel. Workers die, quite their jobs, retire, withdraw from the workforce due to illness, lose their job due to downsizing, or find themselves coping with new duties due to reorganization of their workplace. Dealing with these “goodbye” scenarios requires some basic preparation on the part of management.

Managers must insure that their employees are able to accept the reality of loss, be allowed to experience the pain of grief, and then have time to adjust to the changed environment. Change management, knowledge management, and issues of institutional memory are all discussed to come up with the best practices to insure successful succession planning and to ameliorate the effects of the loss.

CHANGE AND LOSS

Change and loss are inescapable and often ignored in the workplace. Change caused by personnel leaving causes uncertainty which causes employee stress, but this type of change can be prepared for. Change, such as death, retirement, and reorganization cause staff grief. Not dealing with the grief caused by change can cause poor work performance, stress, and health concerns.

According to William Curran in “Succession: The Next Ones at Bat,” during the next ten-year period, beginning in 2010, will see 45 percent of today’s librarians reach age 65. This surge of retirement represents the early-wave of baby boom librarians crossing the threshold of age 65. An aging population means not only retirement but loss through long term disability and death.

Management issues and concepts used primarily in business and other industries can be applied to libraries and other educational institutions. The concepts found in knowledge management, change management, and the transference of institutional memory, aid in dealing with the traumatic loss of library staff, either because of economic or catastrophic losses. It is important to address these issues from an administrative viewpoint. A recent survey showed that often, libraries do not have formal knowledge management plans in place, which causes even more upheaval when there is a catastrophic change.

KNOWLEDGE MANAGEMENT AND CHANGE MANAGEMENT

There are many definitions of knowledge management, of which change management is a component. However, the definition that pertains the most to libraries and the topic of coping with sudden changes that will, not may, occur is that knowledge management is any structured activity that improves an organization’s capacity to acquire, share, and use knowledge in ways that improve its survival and success.

Preparing for change is the intelligent anticipation on the part of managers for the inevitable. Change management is considered to be a set of processes, tools and techniques for managing an individual or a group from their current state to a desired future state to achieve the specific objectives of change. When contending with dealing with personnel who have recently encountered a loss, this means having the means on hand of escorting them through the process through already established plans and procedures to ensure no disruption in the workplace.

Knowledge management will play a vital role in keeping the workplace free of the stress employees encounter when they deal with the loss and grief brought about by the changes caused by death or retirement. Knowledge management means that there will be plans and procedures in place to handle the transition of replacing an employee whose position is now open, whether due to retirement or sudden loss through death, and also of ensuring the continuation of his/her institutional knowledge as well.

INSTITUTIONAL KNOWLEDGE

The definition of institutional knowledge, in this instance, is that it is the collection and preservation of the history, procedures, personnel, undertakings, and successes of an institution, such as a university, business, or a library. Institutional knowledge, for an academic library, means looking at the history, procedures used, and changes to the collection and ensuring there is a record of how the collection has been created, handled, stored, changed, or discarded over time. This means, as personnel change, their knowledge, procedures, and personal achievements need to be recorded and passed along to their successors and colleagues so that continuity is maintained and nothing is lost. Losing a process or procedure can be as disruptive to the workplace as the loss of part of the collection due to incomplete record keeping.

For example, consider the recent departure of a long time library faculty member from the WKU Libraries. This well-published and respected librarian had been on staff for over 37 years, but when she suddenly retired, she left without any discussion of her wide range of institutional knowledge. She operated by knowing "it's in the red box in Room G8 or the files under my desk." Because there was no plan or any kind of redundancy in place regarding her job, her knowledge is now lost to us. The realization of this loss created the knowledge that a longer view needed to be taken and procedures put into place so such a loss does not occur again.

REPLACEMENT PLANNING AND SUCCESSION PLANNING

Sometimes, as a manager, you can anticipate a change or loss of personnel. With Replacement Planning, if someone is planning to retire or is in increasingly bad health it is prudent to anticipate that they will need to be replaced in the workforce. A longer form of anticipation is Succession Planning. "Succession planning, ... is defined as a systematic effort by the library to ensure continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement. It is designed to be ongoing, owned by leadership. It encourages a focus on aligning staff and leadership with the library's strategic goals and objectives (Singer 1)."

PRACTICAL ASSISTANCE FOR LIBRARY MANAGERS

Preparation and advance planning are important to ensure that there is no interruption in service for any business, and for libraries the same is true for both public and technical services. Some

basic tools, in the form of manuals, can be kept handy on an office shelf ready to be put to use at need.

These tools will provide the practical assistance a library manager needs when faced with both anticipated and unexpected losses in the workforce. The situations to deal with may be divergent, but the planning arrangements are similar, providing a reassuring familiarity when being faced with any contingency.

PLANNING

Every department at the library needs to have a written policies and procedures manual. Besides being a useful tool to define the tasks of personnel and have written policies to refer to in case of misunderstandings, a policies and procedures manual can be used for assessment and training. This manual should include the policies and procedures for each job in each department. Since policies and procedures tend to vary from department to department, it is important that the department head ensure that these policies and procedures are appropriate for the intended area and that they are in alignment with the goals and mission of the library. It is also important that this manual remain current, as it will be instrumental as a tool when change takes place.

ASSESSMENT MANUAL

An assessment manual is what will be used when replacing an employee and dealing with their loss. The assessment manual will be put together by a committee in advance of any need of use. The policies and procedures manual will be just one component of an assessment manual. In addition, the assessment manual should include a list of local resources to assist in various anticipated contingencies and a list of personnel who are accountable during different scenarios, to ensure that there will be someone who will take responsibility when there is a change. Lastly, the assessment manual should detail who will be the supervisor and the ultimate person responsible for ensuring that any slack is picked up when someone leaves.

ASSESSMENT PLAN AND CRISIS ASSESSMENT PLAN

An assessment plan is set up to cope with changes in the workplace. It will provide guidelines for an efficient transition. This plan is created by the assessment team/committee in advance. A crisis assessment plan is similar, but it is used to cope with a crisis event for the work staff or a catastrophic loss of an employee in the workplace. It provides guidelines to help with an efficient intervention.

ASSESSMENT TEAM

When there are changes in the library workforce due to sudden loss or crisis, having a group of individuals available to step up, ready to make decisions is important to continue uninterrupted workflow. In *Healing Grief at Work*, Wolfelt suggests that: “if you don’t have one, pull together a team of key decision-makers immediately and craft a plan. It should be compassionate and as thorough as possible. Who will need help immediately and how will help be provided to them? Who will handle communication.” Have an immediate short term plan to ensure a smooth transition.

The assessment team needs to be comprised of a top administrator (the director of the library/dean, etc.), the administrative/ management personnel (department heads), some

representative professional staff, and the clerical staff who would be most useful (and having the contacts) in dealing with maintenance issues and related problems.

The assessment team will determine what is needed to be done, appoint who will be responsible during the interim, and who will be trained or retrained.

GRIEF IN THE WORKPLACE

In considering issues of change and loss, grief in the workplace must be included as an issue, since losses of colleagues to both retirement and death take their toll where people have worked together for some time. "Grief adversely affects workplace performance. According to Stein and Winokuer (1989), normal grief reactions include mental lapses, decreased energy, difficulty in making decisions, anxiety, helplessness, inability to concentrate, and preoccupation. Others include social withdrawal, crying, and other seemingly inappropriate workplace behavior (Eyetsemitan 469)."

The grieving process, in a work environment, can cause significant issues to develop, which affect not only the employees most affected, but the general work environment as well. Management must be conscientious in attending to overwhelming signs of staff experiencing difficulty coping during such stressful times. These are some of the kinds of things which should be included the Assessment Manual (mentioned above).

- Be up to date on your institution's Employee Assistance Programs (EAP) and policies; they may be needed.
- Look for local resources to help with grief (counselors, doctors, etc.)
- Accept shock and grief affect everyone differently
- Anticipate varied, delayed, even inappropriate, reactions
- Realize that many people experience strong emotions very privately or very visibly
- Prepare your response to the varied responses of your staff
- Seek others who can be sympathetic, calm during times of high emotion
- Share your feelings with those you feel comfortable
- Recognize that for a time, normal work boundaries may be stretched or tightened
- Keeping a focus on essential work tasks or upcoming deadlines might help provide structure during crisis
- Expect distracted behavior
- Note prolonged changes in staff behavior and work habits
- Anticipate more errors and more frequent, intense water cooler chats
- Be aware of staff who isolate themselves
- Address issues honestly in staff meetings, but don't dwell too long
- Encourage appropriate discussions, remembrances, memorials
- Seek closure, but respect individuals' grieving processes
- Provide and suggest resources, whether online, in print, locally, but do not insist on employees using them
- As managers, disclosing information about the loss of a fellow employee to grieving staff must be considered carefully.
- Cultural protocols: Protocols for expressing condolences vary culturally and socially. Be aware of these often-subtle differences.
- Expressing condolences: Consider expressions of sympathy carefully and avoid platitudes.

CONCLUSION

Library managers are presently dealing with the graying of their workforce, and looking at nearly half of their library staff beginning to retire this decade. To ensure continuity and institutional memory, library managers will need to make sure they have a policies and procedures manual for each department and, ideally, have created job redundancy and/or cross training for both librarian and staff positions.

Library managers must also ensure that their workforce employees are able to accept the reality of loss as their colleagues depart or pass away, be allowed to experience the pain of grief, and then have time to adjust to the changed environment. Preparation and advance planning using such tools as an assessment manual, a policies and procedures manual, and the advance formation of an assessment team, which will be able to swing into action at need, should help maintain a productive workforce.

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