

Sustaining Library Faculty: The Elephant is Big and Gray and is in the Library

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Chances are you are working with one or more Baby Boomers or are one yourself. Born between 1946 and 1964, they're everywhere, especially in libraries. Librarians are part a category the Bureau of Labor Statistics' *Current Population Survey* (CPS) identifies as "professional and related occupations," which includes professions such as architects and engineers, educators, attorneys, and health care practitioners—fields in which the entry level credential is often more than a bachelor's degree. The CPS compiled from 2013 data¹ shows the median age all of these professionals is 43.1. This same report shows the median age of librarians is 50.5. It also shows that 64 percent of librarians are over the age of 45, and over half of that group is over the age of 55.

The ages of tenured or tenure track library faculty at our institution, Grand Valley State University (GVSU), are relatively consistent with the CPS survey. Of the current 26 library faculty at GVSU, 35 percent are over 55, and 27 percent are over age 62, including the two authors of this paper. While no retirements are anticipated during the 2014-15 academic year, last year three librarians over age 62 retired.

An increasing number of older librarians will be our work colleagues for the foreseeable future. How do we keep them engaged, productive, and happy co-workers?

Background

The "advanced" age of librarians, and academic librarians in particular, has been documented for some time.

The first thorough exploration of this issue, *The Age Demographics of Academic Librarians: A Profession Apart*,² referred to a Bureau of Labor Statistics report that stated in 1970, only physicians and dentists were as a professional group older than librarians.³ Using Association of Research Library (ARL) data, which includes Canadian academic libraries, Wilder found that 58 percent of ARL librarians were age 45 and older⁴ in 1994. In a follow up study that figure increased to 65 percent.⁵

In the 1980s, the profession also began to articulate that a large number of librarians would be retiring soon. Barry warned of the "graying" of the profession.⁶ The challenges and ramifications of aging academic librarians were identified in *The 'Graying' of Librarianship: Implications for Academic Library Managers*.⁷ In 2004 concern about the aging library workforce was named by Baker, then University Librarian at the University of Iowa, as a key human resource issue.⁸ We were reminded that Baby Boomer librarians were getting older and heading toward retirement (Lynch 2002; Lynch, Tordella, and Godfrey 2005). A 2009 report, *Planning for 2015: The Recent History and Future Supply of Librarians* predicted that by 2020, 30 percent of American Library Association members then age 59 and older would still be working in 2020.⁹ Reporting on the *Workforce Issues in Library and Information Science* (WILIS) project in 2010, Moran, Marshall and Rathbun-Grub identified the impending Baby Boomer retirements as a major workforce challenge for academic libraries.¹⁰

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It is not an issue confined to North America either. Generational diversity and increasing numbers of older librarians were identified as issues facing South African academic libraries.¹¹ In 2012 Franks stated that 62 percent of Australian librarians were over the age of 45.¹²

Even before the Great Recession that began in late 2007, new library school graduates were advised not to pin their hopes on job vacancies created by retirements. In her aptly titled 2004 *Library Journal* article, "Get over the 'graying' professional hype,"¹³ Rachel Gordon noted that besides Boomer librarians staying on the job longer, many of those who left were leaving management positions which did not always translate into entry-level position openings.

According to Moran et al, a lack of systematic data collection and research on the library workforce as compared with other professions has hampered library workforce planning.¹⁴ The WILIS project, which took place between 2005 and 2009, sought to remedy this by studying the career patterns of North Carolina library and information sciences program graduates from 1964 to 2005. Some 30 percent of academic library survey respondents indicated they would be working beyond age 62,¹⁵ and this was before the Great Recession hit.

Retirement is a life changing, deeply personal decision and influenced by many factors. They include age, one's own health, health of a partner or parent, and a partner's retirement plans. An often overriding factor is economics. Several studies following the Great Recession document the influence of that event on retirement decisions. At the Population Association of America's annual meeting in 2012, McFall presented the first research using actual data showing that the median pre-retirement older American lost five percent of their total wealth between summer 2008 and summer 2009. Her data analysis indicated that average losses were twice that, and that the average worker would need to work an additional 3.7 to 5 years to recoup the losses.¹⁶

As early as 2009, a survey by the Center for Retirement Research found that 40 percent of those

surveyed expected to work four or more years longer than planned.¹⁷ Levanon and Cheng observed that there was an increase in the number of those holding degrees to delay retirement during the 2006-2011 period.¹⁸ During the same period, those with lower educational attainment were more likely to become discouraged into retirement when they were unable to find employment following layoffs, or worked in occupations where physical demands made it difficult to continue working. Their analysis showed that education was one of the industries where the decrease in the likelihood to retire accelerated.¹⁹ While not singling out academic librarians specifically, we do fit in these categories as having higher education and being employed in education.

Besides the impact of the Great Recession, another reason to work longer is that we are living longer, healthier, and more productive lives. As Khan et al²⁰ suggest, subjective life expectancy influences when workers retire. In 1972, when the oldest of the Boomers were 26 and in the beginning years of their work lives, life expectancy at age 65 was 15.2 years. In 2010 life expectancy at 65 rose to 19.1 years, a gain of almost four years.²¹ Some suggest that the intention of working longer may go beyond the Boomer generation. Workers age 45 to 54 had "surprising similar attitudes toward retirement" as those in the 55-64 age group who indicated they planned to delay retirement.²² The premise behind Cappelli and Novelli's book, *Managing the Older Worker: How to Prepare for the New Organization Order*, is that increasing life expectancy and good health is driving a desire to work longer, so older workers will be part of a diverse workplace for years to come. It's not just the Boomers; they're just leading the pack.

Job satisfaction undoubtedly influences how long one intends to continue working as well. The WILIS study showed that academic librarians were "overwhelmingly satisfied" in their positions.²³ That surely will contribute to some older librarians staying on the job.

Whether by economic necessity or choosing to continue doing something they love, we predict that

older librarians will be commonplace in the workplace for the foreseeable future. Higher education has strived for diversity—race, gender, sexual orientation, ethnicity, etc.—for decades. The increasing number of older workers continuing to work past traditional retirement ages will contribute to growing generational diversity. Today it is not uncommon to find three and sometimes an unprecedented four generations working together in an academic library.²⁴ Unlike other types of diversity, generational diversity is time-based and fluid. This year's generationally diverse library may be next year's generationally homogenous library after a few departures, but that will change as librarians come and go, not just retire. As Frey pointed out in the Pew Research Center's FactTank blog,²⁵ this year—2015—marks the year in which the millennial generation (those between age 18 and 34) will outnumber Baby Boomers as the largest living generation in the U.S.

Besides Baby Boomers and Millennials (also known as Generation Y or Echo Boomers), the two other generations being discussed are the traditionalists (also known as Veterans, Matures, or the Silent Generation), who were born before 1946, and Generation X, those born between 1965 and 1981.

One analysis of generational differences in the workplace suggests that despite similarities, "generations in today's workplace differ in aspects of their personalities, work values and attitudes, leadership and teamwork preferences, leader behaviors, and career experiences."²⁶ Creating work environments that accommodate and embrace age diversity will be necessary, not optional, for our libraries to thrive.

In order to foster work environments where different generations thrive and get along, it is beneficial to be cognizant of human development in addition to the key differences between the generations. While much has been written about the characteristics and behaviors of the four generations currently comprising the U.S. workforce, our experience was that most of the literature pertaining to adult development is in conjunction with adult learning or health care, not the workplace.

In *The 'Graying' of Librarianship*, Arthur identified some myths of aging workers including having lower productivity, poor attendance, more prone to accidents, being slower, less creative, unwilling or unable to learn new skills, and resenting younger management.²⁷ She cites several studies that show these stereotypes are inaccurate, and that performance differences are due more to individual differences than aging.

Although there is some divergence in descriptions, the generalizations assigned to the four generations in today's workforce commonly include the following work characteristics identified by Zemke in *Generations at Work: Managing the Clash of Veterans, Boomers, Xers and Nexters in Your Workplace*:

Traditionalists—stable, detail oriented, thorough, loyal, hardworking, inept with ambiguity and change, reluctant to buck the system, uncomfortable with conflict, reticent when they disagree²⁸

Baby Boomers—service oriented, driven, willing to "go the extra mile," good at relationships, wanting to please, good team players, not naturally "budget minded," uncomfortable with conflict, reluctant to go against peers, may put process ahead of result, overly sensitive to feedback, judgmental of those who see things differently, self-centered²⁹

Gen Xers—adaptable, techno literate, independent, unintimidated by authority, creative, impatient, poor people skills, inexperienced, cynical³⁰

Millennials—collective action, optimism, tenacity, heroic spirit, multitasking capabilities, technological savvy, need for supervision and structure, inexperience especially when handling difficult people issue³¹

In *Dealing with the "Grumpy Boomers,"*³² older workers were classified into four groups: disengaged

exiters, engaged high performers, retired on the job, and exiting performers. How can we best handle all of these workers is explored in the next sections.

Legal Considerations

Disclaimer: What follows provides general information related to the law but does not provide legal advice. As with all legal matters the authors recommend you consult a lawyer if you want legal advice.

How did we get to where we are? The image of the beloved, perhaps graying, professor has been epitomized in a number of films. Most of us can easily picture Professor Kingsfield (John Houseman in *The Paper Chase*); Mr. Chips (Robert Donat or Peter O'Toole in *Goodbye Mr. Chips*) and more recently Professor Dumbledore (Richard Harris/Michael Gambon).

If those characters had been tenured faculty with an American institution of higher education prior to 1970, when according to Asheffentel and Card, “mandatory retirement was a nearly universal feature of academic life,”³³ we might not have seen their portrayals of the wise old professor. Even with the 1986 passage of the Age Discrimination Act, colleges and universities were allowed to enforce mandatory retirement of faculty at age 70.³⁴ It was not unusual for colleges and universities to specify a retirement age for faculty. In a column written for *The Chronicle Review*, Fendrich described a time “when every tenure hire had a clearly defined end date”³⁵—a sort of a human resources version of “use by date.” The passage of the federal Age Discrimination in Employment Act (ADEA) in 1967, along with three amendments (1978, 1986, and 1990), heralded the end of mandatory retirement for some. Passage of this legislation and the subsequent amendments resulted in the end of mandatory retirement for tenured (all workers really) faculty on January 1, 1994.³⁶

Ironically, the exemption that allowed colleges and universities to enforce mandatory retirement until the 1994 amendment resulted from what Ashenfelter and Card deemed a “hard-fought victory” by college and university representatives. They made the argument that without mandatory retirement, there

would not be room in academia for young faculty, particularly women and minorities.³⁷

The ending of mandatory retirement corresponds with a growing concern about what a 1986 *Library Journal* editorial deemed “the next shortage of librarians.”³⁸ It’s not difficult to locate articles from the late 1980s to as recent as 2012 echoing Berry’s ominous warnings about librarian shortages due to retirements. With unrealized promises that mass retirements of librarians were on the horizon, many articles enticing students to pursue librarianship were published. Two articles alone from 2002 focused on the need for major recruitment strategies, referring to the “graying of the profession” (Lenzini 2002, Lynch 2002). Then came the Great Recession of 2008 and instead we saw a growing number of newly minted and often discouraged library school graduates attempting to enter a profession at a time when the working world resembled a *paternoster* elevator—the lift cars kept circulating but instead of getting off, librarians were staying in place, resulting in fewer and fewer empty spaces for new librarians to step on and enter the professional environment.

With most workers legally protected from mandated retirement, there are added legal protections that may make even talking about the retirement challenging. According to the American Council on Education’s 2011 report *Supporting the Culminating Stages of Faculty Careers: Legal Issues*,

Faculty retirement must be an individual, voluntary decision. An institution must avoid the appearance of pressuring a faculty member to retire, lest the individual claim coercion and discrimination. Even offering unsolicited advice about retirement or retirement benefits to an individual may be evidence of age discrimination.³⁹

The legal protections provided by ADEA have been beneficial, but they have made it difficult, if not impossible, to have conversations specific to retirement expectations. It is the proverbial elephant in the room (in our case, the library)—“a significant prob-

lem or controversial issue which is obviously present but ignored or avoided as a subject for discussion, usually because it is more comfortable to do so.”⁴⁰

While the ADEA law created a path for faculty to remain in place until illness, death, or loss of interest led them out of the classroom, a 1998 amendment to the law did create a ‘safe harbor’ allowing colleges and universities to offer retirement incentives to tenured faculty. As with all employment law, the safe harbor option has a number of conditions that must be met but it opened the door for higher education institutions to be able to offer retirement incentives. These retirement incentives may include: cash benefits, early access to retirement plan distributions, additional contributions to retirement or deferred compensation plans (TIAA CREF 2014). However, employment rules such as union contracts and tenure or tenure-like systems can limit what organizations can offer.

Ethical Considerations

While colleges and universities have become more like businesses faced with increasing government and public scrutiny and concerns about accountability, the majority continue to exist as non-profit institutions. As such they focus on promoting a mission that enhances the public welfare rather than making a profit for investors and employees. Mission statements, goals, and principals reflect these values. It’s common to find words like support, collaborate, support diversity, and integrity reflected in these public representations of institutions. In addition to common language about supporting student learning, service to faculty, and access to information, some institutions include value statements relating to their faculty and staff as well.

One example is the following from the University of Chicago library:⁴¹

- We relate to each other with honesty and candor.
- We adhere to the principles of fairness, justice and equality in our work
- We treat everyone with equal consideration and courtesy.

- We encourage differences in perspective, opinions and ideas.
- We consider the needs of others.
- We provide an environment that is inclusive and diverse.

Similarly, our own institution, GVSU libraries includes in its vision statement:⁴²

By focusing on the promotion of high quality undergraduate and graduate degree programs, the institution will be the university of choice for students and faculty alike and it will enjoy broad support for its innovative partnerships and initiatives that promote the physical health and the intellectual, social, environmental, economic, and cultural advancement of West Michigan, and ultimately, the advancement of the state, nation and world.

This aspect of GVSU’s culture is further reflected in the University Libraries values statement:⁴³ We nurture employee excellence through a culture of civility, mutual respect, teamwork, inclusiveness, innovation, flexibility, risk-taking, and professional growth.

While only a couple examples are cited, they represent the culture of many higher education institutions—they place a value not only on students but also on faculty and staff. This view is not completely altruistic; universities and colleges are a type of business and as such have an interest in attracting and retaining high-quality employees as well as students. It’s common for universities and colleges to support faculty and staff, offering a variety of professional development programs and even tuition remission programs. An increasing number have added financial planning, life counseling, and other retirement preparation offerings to the mix.

After mandatory retirement ended in 1994, “the American Council on Education (ACE) began to raise awareness of workplace flexibility in faculty careers and to encourage colleges and universities to support faculty in better integrating their professional and personal lives.”⁴⁴

In addition to offering career support, ACE, along with the Sloan Foundation, encouraged a focus on the final career transition, retirement. Results of an ACE study and competition relating to best practices for supporting retirement transitions were reported in *Faculty Retirement: Transitions Revitalized*.⁴⁵ The ACE study and articles appearing almost daily, not just in higher education publications but also the general media, place emphasis on the aging workforce in the United States and other countries. Depending on the article and the industry, the aging workforce is considered an economic crisis or burden, an opportunity, or a moral imperative.

Fostering Engagement

Library faculty generally desire many of the same things whether they are beginning their career or contemplating transitioning to retirement or a different vocation. Our observations are that librarians who are integrating into the profession and a position as an academic library desire to be taken seriously, given meaningful assignments, mentored toward tenure/success, and respected. These desires are not unlike their colleagues near the other end of the spectrum. In *Our Aging Workforce—Strategize Now or Stumble Later*, author Caela Farren cited research produced by The Conference Board in a 2006 report.⁴⁶ That report touted the value of “older workers” and listed their wants:

- An environment in which their opinions are valued and in which they can gain new skills and experiences.
- The ability to choose their hours, take time off to care for relatives and work from home.
- An organization that allows people aged 50 and older to remain employed for as long as they want to continue working
- The opportunity to have new experiences and learn new skills
- Access to good health benefits

Based on her own experiences and surveys reported in the recent book *Millennials and Management: The Essential Guide to Making It Work*, Caraher

identified Millennials have similar wants: they want to matter, have meaningful work, to be heard, to be part of a great team, appreciation and acknowledgement, transparency, work-life balance, strong mentors, and a career path.⁴⁷ It's clear the different generations want essentially the same things in their workplace.

This similarity or “blurring of generations” is re-inforced in *ACRL 2009 Strategic Thinking Guide for Academic Librarians in the New Economy*⁴⁸ where the authors observed about current and incoming student populations as well as those who work in higher education.

We are all “becoming” Generation Y (also known as the Net or Millennial generation). New research shows that increased access to sophisticated technological social tools and increased connectivity via smart phones, laptops, and other handheld devices is changing the behavior of several generations; other generations are taking on the characteristics of Generation Y. Frequently cited generational differences are beginning to blur.⁴⁹

Professional Development and Mentoring: Success Planning, Not Succession Planning

Regardless of their age, academic librarians' roles are rapidly changing, and to be effective they must be knowledgeable, confident, proactive, and politically savvy.⁵⁰ Continuing professional development can help librarians acquire and hone those skills.

In the past employers hesitated to provide professional development opportunities for older workers, assuming that they would not see a return on their investment. According to a report issued by the Society of Human Resource Management Foundation, older workers are more loyal and the return on investment for most trainings is less than three years.⁵¹

The demands of our rapidly changing academic libraries make it essential that librarians constantly acquire new skills. Our organizations benefit from providing opportunities to participate in ongoing ed-

ucation and professional development. By doing so, all librarians, regardless of age, may continue as effective members of our communities for as long as they remain employed.

Both experienced and newer librarians express a desire for and the value of mentoring. Those with experience to share often wish to pass on their experience and those newer to the profession are just as enthusiastic in their desire to learn and succeed. With librarians remaining in the workforce longer, opportunities to lead or move up in an organization may be rare. However, as noted in *New Roles for New Times: Transforming Liaison Roles in Research Libraries*, “the need for staff to develop and employ leadership skills refers not only to positional leadership but to the ability to lead from whatever position an individual holds, often called ‘leading from within.’”⁵²

Establishing mentoring programs provide an opportunity for multiple generations of librarians to learn from each other and to transfer knowledge and experience. However, unlike some industries that often use mentoring programs to train replacements for workers transitioning to retirement, higher education tends to fill positions only after the budget line for a specific position has been vacated; that is, following the departure of a worker. Further, with an eye on recruiting and hiring diverse faculty and staffs, many colleges and universities will require an open search prior to filling a position so there is not always a smooth path to move up in an organization. There is still value in developing future leaders but we must also accept the reality that we may be grooming them for another institution.

Another desire expressed by both more experienced workers and Millennials is flexibility in their work schedule. This growing trend of flexible work arrangements is recognized not just in higher education but also in service and manufacturing industries ranging from automobile and furniture manufacturers like BMW and Herman Miller, to software giants like CISCO and travel companies with large call centers like Ctrip.com International, Ltd. The authors’ institution also offers a Flexible Work Arrangement (FWA) program.

Flexible work arrangements such as flextime, telecommuting, compressed work schedules, abbreviated or part-time schedules, or a compressed work schedule have challenges inherent in successful implementation. The CEO of Yahoo, Melissa Mayer, was in the headlines in 2013 when she ended that company’s work from home or telecommuting program. Mayer shared her thoughts regarding her decision in a memo sent to Yahoo employees:

To become the absolute best place to work, communication and collaboration will be important, so we need to be working side-by-side.... Some of the best decisions and insights come from hallway and cafeteria discussions, meeting new people, and impromptu team meetings.⁵³

Given the changing nature of academic library work and librarian roles with a growing emphasis on moving away from traditional librarian work (such as staffing a reference desk) to working more closely with faculty and students in the classroom and in consultations, Mayer’s thinking may also be relevant to today’s academic library environment. Flexible work arrangements like telecommuting and flextime work well in some industries and individuals in some positions. However, institutional needs and goals and the realities of one’s position may preclude these options from being universally available in an academic library. They simply may not be feasible or realistic.

Librarians at both end of the age-experience spectrum desire flexibility in their *work day*, which is different than flexible work arrangements. It may be for a variety reasons—attending to an elderly parent, caring for young children, or simply the desire to step away from the day to day to immerse in writing, reading, or research. Organizational culture and/or employment contracts have a bearing on flexible work day practices.

Whether we’re discussing Boomers or Millennials, their needs are not dissimilar.

What *is* dissimilar may be the belief by Boomers that they have earned some flexibility and choice

while their younger counterparts still need to pay their dues. We may tend to believe that age discrimination is always directed at the oldest employees in a workplace but new, younger colleagues may feel the frustration of ageist stereotypes as well. We may envy our newer colleagues' recent degree and technology skills and the fresh enthusiasm they bring. We should also recognize that they may feel frustrated with what may be thought of low-responsibility positions and the need to gain experience before taking on leadership roles.

One important stereotype to let go is that increased age equals decreased performance. The expectation should be that all librarians are working to full potential and performing the work to which they are assigned. Issues tied to poor performance, such as illness, absenteeism, and stress relating to family situations, are not restricted to any given age group.

To a large extent, the Americans with Disabilities Act (ADA) and Family Medical Leave Act (FMLA) dictate what organizations can offer. Some employers may be able to accommodate an employee with failing health by providing transitional health insurance until the individual is eligible for Medicare. There is also the possibility of offering retirement incentives as discussed earlier. However, offers usually must be made to a defined group of eligible employees, and as one library director told us, "you risk losing the people you want to stay and don't necessarily lose the ones you would like to move on."

Concluding Thoughts

During the course of our research the authors came to see that the motivations of both Millennials and Boomers in the workplace are similar. We also know from personal experience that it isn't always the worker close to retirement who will leave the organization.

Treating all with respect, providing opportunities for professional and personal growth, and supporting colleagues at whatever life and/or career stage they are at is our best opportunity to keep everyone engaged and happy. In the end we discovered that there's a need for *success planning* rather than *succession*

planning. By valuing and developing librarians and other library workers at all career stages we're able to realize the full spectrum of talent and experience available to our libraries and institutions. Rather than a problem of conflicting generations in the workplace, we have the opportunity to combine the talents, experience, and skillsets of those beginning their careers, in the middle, as well as those looking forward to their next transition. We need to be deliberate and flexible and find ways to support all in reaching their full potential.

There may be elephants in the library but as long as there are other critters present also, there's really not a problem.

Notes

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