Dare to Perform: Using Organizational Competencies to Manage Job Performance

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As library budgets tighten, it has become more important than ever to have flexible and motivated librarians who possess the skills, attitudes, and traits that enable them to meet multiple organizational needs and adapt as those needs change. Encouraging those librarians to continue growing as professionals over their careers is equally important. Competency-based hiring and evaluation can enable organizations to:

1. Recruit employees who can meet the organization's current needs and who are willing to fulfill the required job duties.
2. Evaluate employees based on their current activities as well as their professional development efforts.
3. Set benchmarks for employees' continued professional development and learning that are beneficial to the organization.

Although competency-based hiring and evaluation is a common topic in management and business literature, applying these tools in libraries where librarians are faculty members is less common. For tenure-track librarians, evaluations and tenure reviews typically are governed by retention, promotion, and tenure (RPT) documents, which lay out guidelines for faculty success across the university system. However, these documents tend to lack the specificity of job descriptions and provide little concrete information about detailed performance expectations. Librarians classified as staff often rely on yearly evaluations, which are usually based on past achievements rather than competencies and are often equally vague. Libraries commonly use job descriptions to describe needed traits and skills for potential hires, but these descriptions are not always used for planning and evaluative purposes for current employees.

Competency-based evaluation, as a complement to RPT documents or yearly evaluations, can help supervisors provide feedback to encourage library faculty members' continued growth and development, clarifying job priorities to better meet institutional goals. Although competencies vary based on each position, they provide clear standards that enable consistent evaluations across positions. In this paper, we chronicle how one division at the University of Utah J. Willard Marriott Library used core competencies to manage job performance. We discuss how supervisors used these tools to 1) recruit librarians capable of doing the current job and growing as the position changes, 2) assess employees' current skills in light of organization needs, and 3) help employees develop additional necessary skills over time. We also describe how our employees use core competencies to develop their own growth plans.

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Literature Review

Pralahad and Hamel were the first to develop the concept of core competencies. They define core competencies as "the collective learning in the organization, especially how to co-ordinate diverse production skills and integrate multiple streams of technologies."[1] They suggest that core competencies "make a significant contribution to the perceived customer benefits of the end product," and are "difficult for competitors to imitate."[2] In practical terms, core competencies are comprised of the attitudes, tools, and skills that allow the entire organization to function at a high level in order to attract and satisfy its clients. At an individual level, competencies support evaluating success on the basis of continued professional growth rather than just the completion of work outcomes.

Despite the growth of scholarly work describing how libraries use core competencies to structure their recruitment, hiring, and assessment strategies, Wanda Dole states that "there is no standard, universally accepted definition of core competencies in libraries."[3] Giesecke and MacNeil describe core competencies as the "knowledge, skills, and abilities that every employee needs for an organization to be successful,"[4] while Tamloet and Tuamsuk describe a core competency as a "quality, knowledge, basic ability possessed by every individual in the organization. It can be said to be a common characteristic of the organizational personnel and hence, the organizational culture."[5] Although these definitions have slight differences, both recognize the connection between individual skills and organizational values, as well as the need for evaluation based on continuous learning and growth. For example, being able to use a specific set of computer programs is a skill. However, to succeed in libraries, many library staff would also need a willingness to continue building their computer skills in the future, the ability to acquire those skills quickly and effectively, and an understanding of how those skills could be applied to serve patrons. Thus, a core competency that combines the library staff member's skills, attitudes, and knowledge might be worded as "uses multiple computer programs effectively to support patron needs." This kind of statement also describes a trajectory for growth.

Evaluating employees based on growth capacity is imperative in a field like librarianship, where job positions and required skills are changing rapidly, making it necessary to hire employees who can and will learn new skills to fit these positions. Goetsch describes libraries as "post-job" organizations, observing the obsolescence of some traditional librarian skills and the increasing demand for soft skills—"flexibility, continuous learning, comfort with ambiguity, and the ability to retool and retrain,"[6] skills that might be better described as competencies. She observes that as time passes and technology changes, the skills and responsibilities the profession is asking for in new librarians are changing.[7] Similarly, Mullins surveyed ARL directors regarding the desired skills for MLS graduates, and found that "new roles require different characteristics for librarians as well as different skills and knowledge."[8] However, not only new librarians bear these responsibilities. While some libraries are implementing competencies initially with new hires, current employees must adapt to updated competencies and new patron expectations.

Describing the work of library staff in terms of competencies requires a shift in thinking from traditional hiring and job description practices, which tend to emphasize skills rather than competencies. Unlike many skills- or activities-based assessment models, competencies incorporate soft skills, abilities, expertise, and values in addition to traditional knowledge, skills, and work products reflecting employers' need for well-rounded and adaptable employees. Lehner argues that conventional recruitment and hiring strategies, which tend to recruit for skills and are "structured around a strictly defined, stable set of job tasks,"[9] are ineffective in the quickly changing world of libraries. Instead of a purely outcomes-based approach to evaluating new hires, he suggests that "perhaps the most appropriate approach is to acknowledge that we are selecting for the ability to undertake the current responsibilities of a position, but to place even greater emphasis on the ability to adapt

to new, often unforeseen job duties in a fluid and increasingly unstructured organization."[10] However, forecasting the skills required to fill a current position is easier than imagining the core competencies that will be required as the position evolves over time.

Core Competencies in Libraries

Libraries have used core competencies to illustrate the abilities and attitudes necessary for current employees to support each library in achieving organizational objectives. In particular, several organizations have developed competency documents designed to explain the characteristics necessary for specialists in different areas of librarianship. Ammons-Stephens notes that four of the American Library Association (ALA) divisions have created core competencies outlining the key attitudes and skills required for specialized libraries and departments to succeed.[11] In addition, individual libraries also use competencies to provide library staff with appropriate benchmarks for success, allowing them to set goals for continuous learning.[12] Gendron also suggests that libraries can use core competencies to develop strategic planning and set standards for library professionals throughout the organization.[13]

One trend in the literature is for organizations to first implement core competencies with new employees, often in the hiring process. Huff-Eibl, Voyles, and Brewer, for example, describe the benefits of using competencies in job descriptions in the wake of a library restructuring to recruit and hire employees with both the necessary skill sets for their current positions and the ability to adapt well to future changes. The University of Arizona Libraries rewrote position descriptions to include expected core competencies and asked interview questions designed to elicit whether or not candidates could meet competency requirements. They note that, as a result of this strategy, "prior to interviews, candidates are now given an unvarnished picture of what it means to be a staff member or librarian at the UA Libraries."[14] Another point for introducing core competencies is during a period of change, such as during reorganization. Chamberlain and Reece describe how they used a developed set of core competencies, combined with each staff member's self-assessed skills and interests, to rewrite job descriptions for their employees during a restructuring of the serials and e-resources team at the University of Texas at Arlington. They note that competencies are "helpful not only in defining the qualities needed by staff in working with e-resources, but also as a guide for training new and existing staff by identifying areas for growth."[15] The use of core competencies in these cases enabled new hiring and job evaluation practices that helped each institution better match its employees to its needs.

Core Competencies at the Marriott Library

In order to understand the evolution of our attempts to implement core competencies in the Marriott Library's Research and Information Services (RIS) division, it helps to appreciate where we have been. In August 2007, the library convened an internal library committee, the New Roles Task Force, charged with creating new mission, vision, and values statements as well as an organization-wide competencies document. The New Roles Task Force developed a set of organization-wide core competencies focused on customer service, accountability, and communication (see Appendix A).

Based on these competencies, the library's Human Resources department developed a new template for position descriptions that was incorporated throughout the library. The RIS division was the last group to go through the process of learning about core competencies and rewriting job descriptions. During the library's 2008 annual performance review period, all library staff and faculty completed self-evaluations that asked them to evaluate their success in meeting the core competencies. Library employees could determine that they met the core competency fully, somewhat, or not at all. This self-evaluation was designed to serve as a baseline measure that could be used to help measure future professional growth.

All library staff and faculty were asked to further engage with library competencies during the

2009 annual evaluations, when they met with their supervisors to create new position descriptions. Library employees were asked to start crafting new job descriptions that incorporated competency-based language to describe their responsibilities. Using the baseline self-evaluations from 2008, employees could work with their supervisors to include specific areas for growth and professional development within their competency-based position descriptions.

The position descriptions were part of the annual evaluation process. There were two to three meetings with each librarian during the first year. The library continued to progress in its efforts to incorporate competency-based evaluation in 2010, when the library Human Resources department introduced a new performance review process that asked both the employee and supervisor to rate the employee's success in meeting the organization-wide core competencies, which were broken down into sixteen different areas (see appendix B). Each employee was asked to rate each competency as an area of strength, an area of competence, or an area for improvement, and the library began to develop and offer trainings and other professional development opportunities to assist employees in their efforts to achieve competence in all required areas. The library continued to ask employees to conduct this self-evaluation on an annual basis for the next three years. The library also began to incorporate competencies into its hiring and onboarding processes. For instance, in 2010 the library Human Resources department developed an employee onboarding program that included explicit discussion of organization-wide core competencies from day one as well as departmental and position expectations.

While the library's administration and Human Resources division focused on incorporating competencies into library-wide assessments, each department within the library had the flexibility to incorporate core competencies into its own internal workings. RIS, a division of the library's Research and Learning Services department, decided to build upon the library's efforts to incorporate core competencies for each position into job descriptions for librarians and library staff in 2011 and 2012. Since RIS provides research and instruction support to patrons, each RIS position description included specific competency-based language requiring that the library staff and faculty maintain competence in public-service skills and abilities such as "actively seek opportunities to provide customized reference and research service," "follow the ALA's *Guidelines for Behavioral Performance of Reference and Information Service Providers*," and "deliver high quality reference and research support on demand." Alfred Mowdood, Head of RIS, began using the competency-based job descriptions to address areas for employees' professional development, working with each librarian and staff member during the yearly review process to evaluate their success with each competency and to chart opportunities for growth.

More recently, the library updated its annual review process, and library employees described their proficiency with organizational competencies and potential areas for growth in a narrative format. Supervisors and employees reflected on the employee's accomplishments during the previous year and identified areas for additional professional development. This format provided employees and supervisors with a more flexible avenue for discussing job performance. In fall 2014, the library redesigned its RPT standards to match changes in the university's tenure structure. Faculty members will no longer receive the same annual performance reviews as staff members, although they will continue to be evaluated annually until they achieve tenure, and every five years once they have reached tenure.

Core Competencies in Research and Information Services

RIS is an 11-person library division consisting of both faculty and professional staff members who provide public services, including reference and instruction services, to the library's patrons. The librarians and staff member of RIS have an average of 20 or more years of library experience and expertise. RIS is re-

sponsible for coordinating librarian services at the Marriott Library's Knowledge Commons, and its librarians also provide liaison services to ten colleges including: Business, Science, Humanities, and Social and Behavioral Science. It has a Head, Alfred Mowdood, and an Assistant Head, formerly Sarah LeMire. In an effort to harness the potential of core competencies to encourage professional development and growth, RIS has taken the initiative in implementing core competencies, especially as a complement to the RPT process for academic librarians. RIS has been using competency-based annual performance reviews and RPT reviews together to show how each librarian had met his or her professional obligations as a faculty member and at the same time evaluate areas for future growth and development.

One of the first ways we accomplished this was by creating job advertisements that listed required and preferred core competencies for new librarians. For instance, the most recent RIS job posting included a job description requiring competency in being able to learn and teach new learning technologies effectively. Based upon this competency, the new librarian, Lorelei Rutledge, was able to reflect on her skills from the point of hire and request additional training on several information technology tools to enable her to meet this competency. This and other competency-based statements in her job description also allowed her to develop her own professional development plan. For instance, the ability to provide high-quality research support is a required competency and many of the faculty in her core areas are interested in qualitative research, she knew that she needed to improve her use of computer programs for qualitative research. Based upon this competency, Lorelei has pursued training and experience in NVivo and other qualitative research tools.

The second way we integrated core competencies into the division was by having the RIS supervisors, Sarah LeMire and Alfred Mowdood, meet annually with employees to discuss whether their job descriptions still matched the work they were doing and whether they could meet the core competencies required in each job description. For example, when Alfred and Sarah met in 2013 to discuss a revision to Sarah's annual job description, they were able to adjust the description to accommodate her new supervisory responsibilities. In addition, they were also able to identify Sarah's desire for additional support and training regarding outreach. Alfred was able to provide Sarah with immediate feedback and also longer-term support for her outreach efforts. This strategy, implemented by the RIS supervisors each year, successfully provides each librarian with valuable feedback about opportunities for growth, including new leadership responsibilities and faculty advancement.

The third way we successfully paired competencies with the RPT process involved collaboration between the department and division heads to create required competencies in the form of best practices documents for specific areas of job positions. For instance, we recently updated best practices documents that describe appropriate ways of relating to patrons face-to-face, via phone, or online. These documents form the basis for several of the public services core competencies that are integrated into job descriptions and enable supervisors to have productive discussions with each employee on areas where they can continue to build skills. Another useful outcome is that the Associate Dean of Research and Learning Services is able to refer to these best practices documents when disseminating expectations for reference, teaching, and outreach based on core competencies.

We have ensured that competencies are incorporated into all position descriptions within RIS and in the Associate Dean's expectations of librarians and library staff within the larger Research and Learning Services. Librarians and library staff in RIS have updated position descriptions when their duties and tasks have changed substantially. In the past, position descriptions changed rarely and only when library staff received a new job title. Updating position descriptions more frequently has enabled library staff to perform tasks that better reflect library strategic plan initiatives and remove obsolete duties from their jobs.

Benefits and Limitations

Harnessing the potential of core competencies at a division or department level can be challenging for a variety of reasons. The RIS division could more easily perform evaluations based on core competencies if all of the divisions across the library likewise created divisional and position-specific core competencies. As a result, there would be consistent buy-in across the organization and division heads could work together to ensure that each division's core competencies worked to meet organization-wide goals. Unfortunately, designing core competencies for each division, let alone each position, is arduous work. Additionally, it may be unclear exactly who is responsible for establishing each core competency. Given the fast-changing nature of each position and division, carving out enough time to design each competency, to keep it current, and to evaluate it has proven difficult.

Likewise, the process of developing institutional and position-specific core competencies for faculty is difficult, given that the primary assessment opportunity for faculty comes during the RPT process. Traditional faculty reviews at the University of Utah are activity-based; they focus on achievement, rather than opportunities for personal and professional growth. Although the parameters of RPT evaluations are defined broadly, they are not mapped to core competencies specifically. However, core competencies, as the experience of other libraries shows, are vital to both assess the day-to-day skills needed to meet position demands and develop a growth trajectory for each librarian. RPT evaluations, on the other hand, focus on past work and do not necessarily define a professional development plan for the future.

There are also benefits to implementing core competencies at the division level. In our case, the RIS supervisors were able to take the time to meet with each librarian to discuss core competencies, revise job descriptions to reflect those competencies, and then create professional development plans based on the findings. Since the process was not rigid, there were many opportunities for discussions and reevaluations of each librarian's growth trajectory. By focusing on core competencies, we also gave librarians the latitude to learn new skills, experiment with new ideas, and meet goals in different ways. Our work provides a practical model for other library divisions, or departments as well, should they be interested in integrating competencies in a similar way.

An added benefit of using core competencies in this way is that it still enables us to work within the context of RPT to provide librarians with regular feedback aimed at professional growth. Since the librarians at the Marriott Library who have already received tenure are only evaluated every five years, this regular feedback becomes essential to ensuring that they have opportunities to reflect on their current skills and abilities as well as their opportunities for future growth.

Future Goals

In the future, we would like to continue to examine and improve how we structure core competencies at the division level to support librarians in their day-to-day growth. We also hope to spark a discussion among other libraries about how they use core competencies together with tenure evaluation or annual reviews. As many libraries continue to experience staffing and budget limitations, using core competencies can be a good way to document and invest in employees' continued growth across the profession. The RIS division intends to continue using core competencies in its job descriptions, best practices documents, and employee onboarding processes. We would like to continue exploring the role that core competencies play in librarians' professional development activities, based upon our belief that using core competencies can help employees identify areas for professional growth, and subsequently that this continued growth enables professional engagement and innovation.

Appendix A.
Marriott Library Organization-wide Competencies

Approved Final Draft 12/17/07, revised 2/2/09

Marriott Library is committed to its employees and will provide guidance and training to help them achieve success in the three competency areas. The Library supports and rewards continuous learning and training.

Patron Focus—

- Keeps patrons as the focal point of activity. Understands and meets the needs of patrons and addresses their interests and concerns in a timely and professional manner.
- Demonstrates commitment to patrons by maintaining standards of accuracy, excellence, and professional conduct.
- Understands the organizational structure of the library. Seeks to achieve results across disciplines, departments, and functions.
- Understands the library's collections and core systems—such as the catalog, website, and online research databases—and can assist patrons in using them.

Effectiveness—

- Demonstrates initiative and a willingness to increase knowledge for personal and organizational growth. Achieves institutional, professional, and personal goals.
- Adapts to changes in direction and priorities and accepts new challenges, responsibilities, and assignments.
- Assumes accountability for one's work, actions, results, and risks. Follows through on a consistent basis.
- Plans and organizes well by managing time and priorities to accomplish tasks.
- Anticipates changes and trends to effectively allocate resources and implement library initiatives.
- Maintains skills in current tools and technologies necessary to complete job tasks.
- Follows University and library policies and procedures.
- Supports the University's adherence to the American College and University Presidents Climate Commitment (http://www.presidentsclimatecommitment.org)

Communication—

- Listens effectively and transmits information clearly and accurately.
- Communicates constructively and respectfully with patrons and colleagues.
- Builds working relationships and partnerships at all levels and across departments and functional lines.
- Employs the library's communication technologies—such as E-mail, online calendar and staff intranet—to effectively and efficiently collaborate with colleagues and address patron needs

Appendix B. Marriott Library Performance Review Process

Organizational Competencies Assessment **Marriott Library Performance Evaluation**

Employee: Supervisor: Date:

Instructions: Rate your ability to meet the expectations associated with each competency below. Any competency marked as an "Area for Improvement" should include comments and have a related goal in the Job Assessment and Goals section.

Ratings Descriptions

Area of Strength: consistently exceed all or most of the expectations associated with this competency

Competency	Employee Rating	Supervisor Rating	Comments
Understand and meet patron needs	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Understand the Library's foundation: organizational structure, core systems, and collections	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Build relationships throughout the Library to achieve cross-departmental results	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Set and achieve goals that show initiative and a willingness to increase knowledge for personal/organizational growth	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Assume accountability for one's work and actions and follow through on a consistent basis	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Communicate respectfully and effectively when listening, speaking, and writing	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Exhibit strong organizational skills: manage time, prioritize tasks, allocate resources	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**
Maintain and develop skills in tools and technologies necessary to complete job tasks, assist patrons, and collaborate with	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	☐ Area of Strength ☐ Area of Competence ☐ Area for Improvement	**Employee:** **Supervisor:**

Notes

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