Faculty of Information and Media Studies, The University of Western Ontario
GRADLIS 9005A-001 – Managing and Working in Information Organizations
Course Outline Fall 2022

Course information

GRADLIS 9005A-001 – Managing and Working in Information Organizations

Synchronous class time: Thursdays 6:30-8:30 FNB 3220

Instructor Information

Instructor: Pam McKenzie, Professor (she/her/hers)

Email: Please contact through OWL messages **https://owl.uwo.ca** except in case of emergency: pmckenzi@uwo.ca

Teaching Assistant: Sam vander Kooy (he/him/his)

Email: Please contact through OWL messages with a cc to e-mail

Course Description

This course offers a critical perspective on issues involved in managing and working in contemporary information organizations. Students will be introduced to theory and practice in organizational design and culture, strategic planning, financial management, human resources, labour-management relations, policy and ethical challenges, leadership, and communication.

Assignments (summary: details below course-at-a-glance table)

1. External/crisis communication case study due 6:00 PM 29 September   20%
2. Team assignment due 6:00 PM 27 October   30%
   - Three group-graded components
     a) Team process documents (5%)
     b) Presentation (10%)
     c) Brief report (10%)
   - One individually-graded component
     a) Self/team assessment (5%)
3. Planning and budgeting case study   25%
   a. Initial pitch for feedback from CoP (ungraded, due 6:00 PM Thursday November 24 11)
   b. Final assignment due 6:00 PM December 8 November 24
4. Appointments Committee case study   20%
   a. Initial assessment due 6:00 PM November 10 December 1
   b. Reflection on Community of Practice discussion due 6:00 PM November 17 December 8
5. Preparation, engagement, and learning (feedback on each component, graded end of term) 5%
   - Initial goal-setting exercise due 6:00 8 September
   - Midterm self-assessment due 6:00 PM 20 October
   - End-of-term self-assessment due 6:00 PM 8 December

Course Materials

Textbooks used in this course include:

- Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: NealSchuman. Available online through Western Libraries Online Public Access Catalogue from on campus or through the proxy server [link to OPAC record]
- Moran, Barbara B., and Claudia J. Morner. *Library and Information Center Management, 9th Edition*, ABC-CLIO, LLC, 2017. *ProQuest Ebook Central*. Available online through Western Libraries Online Public Access Catalogue from on campus or through the proxy server [link to OPAC record]

These textbooks and all other required readings are available online and will be linked directly from a lesson. Books will also be on reserve in the FIMS Graduate Library where possible.

Graduate Course-Level Learning Outcomes

Upon successful completion of readings, assignments, and class participation, students will be able to:

1. Understand, apply and evaluate theories of and approaches to management and organizational science in the context of information organizations (Program-level learning outcomes 1, 2, 5);
2. Communicate and collaborate effectively with others including users, colleagues, employers, and members of the community (Program-level learning outcomes, 4, 6, 9);
3. Apply legal, policy, regulatory and ethical frameworks relevant to the context of information organizations (Program-level learning outcomes 1, 2, 3, 5);
4. Apply professional values and standards in professional practice in information organizations (Program-level learning outcomes 3, 7);
5. Engage with ambiguity and change in the spirit of intellectual inquiry (Program-level learning outcomes 1, 2, 3, 5);
6. Develop awareness of the overarching social responsibility and power associated with the practice of library and information science (Program-level learning outcomes 1, 2, 3, 4, 5, 9)

Course Timeline and Format

Content for the course will all be delivered online, in a "flipped classroom" mix of asynchronous online and synchronous F2F instruction.   For more information, see *How the course works* on the OWL Course Overview page. For details of topics and dates, see the table below.

Enrollment Restrictions

Enrollment in this course is restricted to graduate students in the Master of Library and Information Science Program, as well as any student that has obtained special permission to enroll in this course from the course instructor as well as the Graduate Chair (or equivalent) from the student's home program.

Course-at-a-glance table

Overview and Introductions (1 class)		
Class	**To complete before the beginning of class**	**Synchronous class session**
1. Course overview and instructor and student	**Complete by 6:00 PM September 8 (66min)** - **Course overview. Acquisition/Investigation.** Lectures: Course overview, Land acknowledgement. Review the course outline, check out assignments.	**Thursday September 8, 6:30-8:30 (90 min class time followed by office hour)** **Collaboration/Investigation/Production.** Concept mapping:

introductions	• **Initial goal-setting exercise. Production. (requires @uwo login)** https://forms.office.com/r/ej8k471JXN • **Introduce yourself to the class two ways (Collaboration)**	Community of Practice kickoff activity

Module 1: Organizational processes and flows (2 classes)

Class	To complete before the beginning of class	Synchronous class session
2. Working and communicating with stakeholders	**Complete by 6:00 PM September 15 (120 min)** • **Surviving and thriving in the first term (or any term) of the MLIS.** Lecture. • **Identifying stakeholders: Acquisition/Investigation/Collaboration.** Lecture, contribute to full-class stakeholder identification document. • **Communicating with stakeholders: Acquisition/Practice.** Lecture. • Get a head start on your readings for your External Communication Case Study. It'll take about 144 min so I've built 60 min of that into this week's prep time: Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: Neal Schuman. Chapter 4. Writing (pp. 63-90). Chapter 9. Applications: Writing, sections 9.1 When to write and when not to write, 9.2 Internal Communications versus External Communications, 9.3 Messages (307-320); 9.13 PR, Publicity, and Promotion (353-367). [link to OPAC record] Thenell, Jan. 2004. *The library's crisis communications planner: A PR guide for handling every emergency.* Chicago: American Library Association, Chapters 4. Identifying library audiences and stakeholders 20-25, 7 Building positive media relationships 44-51, 8. Communicating during a crisis 52-59, 9. After the crisis: a time of opportunity 60-66. [link to OPAC record]	**Thursday September 15, 6:30-8:30 (60 min class time followed by office hour)** **Guest lecture:** Erin Isings, Crisis communication. External communication assignment Q&A
3. Information professions, the information workforce, credentialing and competencies	**Complete by 6:00 PM September 22 September 15 (95 min)** • **Supporting a diverse workforce. Investigation** • **Information Professions. Acquisition/Investigation.** Lectures, Readings: Drabinski, Emily. 2020. Professionalism Reconsidered. Evidence-base library and information practice. 15(3) DOI: https://doi.org/10.18438/eblip29772; find a job ad for your Planning and Budgeting Case Study	**Thursday September 22, 6:30-8:30 (60 min class time followed by office hour) Collaboration/Investigation/Production.** Discussion of information professions, supporting a diverse workforce. Time for class Q&A

Module 2: Approaches to Management and Organizational Structure (2 classes)

Class	To complete before the beginning of class	Synchronous class session
4. Organizational structure and governance	**Complete by 6:00 PM September 29 (99 min)** • **Production: External/Crisis Communication Case Study due, 20%** • **Organizational structure and governance: Acquisition/Investigation.** • Lectures. Organizational structure, Organizational structure and governance in academic and public libraries. • Reading: Stevenson, Siobhan. 2021. Building an anti-racist campus means fundamentally rethinking institutional structures and practices. *Academic matters: OCUFA's journal of higher education.* https://academicmatters.ca/building-an-anti-racist-campus-means-fundamentally-rethinking-institutional-structures-and-practices/ • Organizational chart activity. Come to class prepared to discuss in your Community of Practice	**Thursday September 29 6:30-8:30 (60 min class time followed by office hour)** **Investigation/Discussion/Collaboration** Organizational chart/structure discussion.
5. Approaches to management. Team assignment kickoff.	**Complete by 6:00 PM October 6 (110 min)** **Approaches to management. Acquisition:** Lectures. Approaches to management , What managers do, New public management **Investigation:** What/who's left out of mainstream approaches to management? Read one or both of: • Vong, Silvia 2021. More Critical, Less Managerial: Addressing the Managerialist Ideology in Academic Libraries. *Partnership*, 16(2), 1–20. https://doi.org/10.21083/partnership.v16i2.6354 • Härtel, Charmine EJ. 2015. Indigenous Management Styles. *International Encyclopedia of the Social & Behavioral Sciences*, 2nd edition, Volume 11, pp. 784-787. Link to library catalogue record • Working in teams kickoff	**Thursday October 6, 6:30-8:30 (70 min class time followed by office hour)** **Collaboration/Discussion** Team Assignment team kickoff (Survival exercise, 40 min) Team reflection and brainstorm (25 min) Team Assignment Q&A

Module 3: Communication and organizational culture, Individual dimensions, Interpersonal dimensions (3 classes)

Lesson	To complete before the beginning of class	Synchronous class session Thursday 6:30
6. Working	**Complete by 6:00 PM October 13 (97 min plus**	**Thursday October 13, 6:30-8:30**

in teams	assignment time)
	• **Individual differences and intro to teams. Acquisition. Lecture. (33 min)**
	• **Designing teams for success. Acquisition/investigation/Collaboration. (64 min)**
	   o Lectures: Designing teams for success.
	   o Readings. If you like, read from the assignment resource: Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: Neal-Schuman, Chapter 7, Working in groups 197-237. [[link to OPAC record](#)]
	   o Investigation/Collaboration. Contribute to your team's collaborative documents in preparation for our synchronous class.
		(120 min class time, no office hour)
		Practice/ Collaboration
		Forming and norming: Establishing your team's norms, expectations, goals (35 min)
		Assess the team's skills and begin to assigning task-related, interpersonal, self-management, virtual roles 40 min)
		Analyze the problem or task, begin to develop a workplan to support assigning responsibilities (Breakout room, 40 min)
		Quick full-class wrap-up

7. Organizational culture and workplace communication	**Complete by 6:00 PM October 20 (104 min)** • **Organizational Culture: Acquisition/Investigation. (68 min).** Lecture, reading: Schraeder, Alvin M. 2012. School to work transitions: hitchhiking across cultures. *The future is now: responses to the Canadian library human resources stud*y. Ottawa: 8Rs/Canadian Library Association, 4-28. [[link to document](#)] • **Communication basics: Acquisition/Exploration. (36 min)** Lecture, optional supplementary reading : Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. Communicating professionally. Chicago: Neal-Schuman, 1. Nonverbal Behavior 3-20, 2. Listening 21-29, 3.1-3.3 Introduction to speaking skills, acknowledgement, minimal encouragers (31-33) and 3.8 Reflecting content (41-42) [[link to OPAC record](#)] • **Production:** Midterm self-assessment due https://forms.office.com/r/KM9W3vh1Dv	**Thursday October 20, 6:30-8:30 (75 min class time followed by office hour/team time)** **Practice/Collaboration:** Active listening (60 min) Team time/Q&A
8. Interpersonal communication, conflict resolution	**Complete by 6:00 PM October 27 (30 min)** • **Conflict resolution. Acquisition:** Video and short narrative, Lecture, Readings: Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. Communicating professionally. Chicago: Neal-Schuman. 3.8 Reflecting content 41-42, 3.9 Reflecting feeling 42-44, 3.13 Confrontation 50-53. [[link to OPAC record](#)] (11 min) • **Production:** Team assignment and individual assessment 30% total	**Thursday October 27, 6:30-8:30 (90 min class time followed by office hour)** **Investigation/Practice/ Collaboration**. Conflict resolution role-play scenarios

October 31-November 4. MLIS research week: no class		

9. Motivation, Leadership, Giving and receiving feedback	**Complete by 6:00 PM November 10 (110 min plus assignment time)**
	• **Supporting workers "outside librarianship's center" (20 min). Acquisition/Investigation. Reading.** Ettarh, Fobazi. 2018. Vocational awe and libraries: the lies we tell ourselves. *In the library with the lead pipe* https://www.inthelibrarywiththeleadpipe.org/2018/vocational-awe/
	• **Motivation and leadership (55 min)** Motivation (30 min), Leadership (25 min). Acquisition/Investigation. Lecture and reflection.
	• **Giving and receiving feedback (60 min)**
	   • **Acquisition: Reading.** Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating Professionally.* Chicago: Neal-Schuman, 3.14. Giving Feedback, 3.15. Receiving Feedback p.53-56. [link to OPAC record] (10 min)
	   • **Production**: Before class, prepare an initial pitch of your Planning and Budgeting Case Study idea (1 hr+ of assignment time, depending on where you are); Complete the reviewee worksheet (15 min) and exchange in your CoP
	   • **Investigation**: Review another CoP member's pitch, complete the reviewer worksheet (30 min)
	   • **Investigation/Production:** Complete the reviewee worksheet and exchange your pitch and worksheet with a CoP member.
		Thursday November 10, 6:30-8:30 (45 min class time followed by office hour)
		Practice/Collaboration/Discussion: Come to class prepared to give and receive feedback. We'll dive right in for a short but intense session and use the rest of the time for office hours/CoP time.

Module 4: Strategy (2 classes)

Lesson	To complete before the beginning of class	Synchronous class session
10. Planning and budgeting; setting goals and priorities	**Complete by 6:00 PM November 17 (67 min plus assignment time)** • Planning and budgeting process: Acquisition/Investigation. Lectures; Explore planning and budgeting documents	**Thursday November 17, 6:30-8:30 (45 min class time followed by office hour)** **Practice/Collaboration/Discussion** PEST/SWOT analysis; Planning and budgeting discussion
11. Assessing outcomes; measuring and	**Complete by 6:00 PM November 24 (72 min plus assignment time)** • **Production:** o Planning & Budgeting Case Study • **Assessing outcomes. Acquisition/Investigation.**	**Thursday November 24, 6:30-8:30 (60 min class time)** **Collaboration/Discussion:** CoP discussion of evaluation in information organizations

demonstrating impact	Explore library assessment methods.	

Module 5: Human resources (2 classes)

Lesson	To complete before the beginning of class	Synchronous class session
12. Labour & Employment Law 1: Staffing: hiring and EDID; Labour & Employment Law 2: Labour relations, working in a unionized environment	**Complete by 6:00 PM December 1 (88 minutes plus assignment time)** • **Staffing: Acquisition/Investigation (31 min).** Lecture, investigation. • **HR law 1: Human rights and equity. Acquisition/ Investigation (42 min).** Lecture, reading: Bell, Norda A. 2021. An Exploratory Study of Diversity Statements in Canadian Academic Librarian Job Advertisements. *International Journal of Information, Diversity, & Inclusion* 5(3) 152-172. https://jps.library.utoronto.ca/index.php/ijidi/article/view/36202 ; https://doi.org/10.33137/ijidi.v5i3.36202 • **HR law 2: Labour relations, working in unionized environments. Acquisition/optional Investigation (15 min).** Lecture. • **Staffing/equity/unionization. Production:** Submit the first part of your Appointments Committee case study assignment. Come to class prepared to discuss with your CoP	**Thursday December 1, 6:30-8:30 (60 min class time followed by office hour) Investigation/practice/ Collaboration** Appointments Committee case study in CoP; make notes and prepare to submit Part 2.
13. Labour and Employment Law 3: employment standards, workplace safety, termination	**Complete by 6:00 PM December 8 (72 minutes) Labour and employment law 3: Acquisition/Investigation/ Practice.** Lecture (26 min). Labour and employment law case studies. Investigate your CoP's scenario (45 minutes) and come prepared to discuss in class. • **Production:** Submit the second part of your hiring manager case study assignment. • Preparation, Engagement, and Learning Final self-assessment https://forms.office.com/r/5LnrK3ai7J (requires @uwo login)	**Thursday December 8, 6:30-8:30 (60 min class time followed by office hour) Investigation/Practice/ Collaboration** Labour and employment law case studies Course wrap-up and send-off!

Course Policies

This course will adhere to the policies of the MLIS program, the School of Graduate and Postdoctoral Studies, and the University. For more information, see

- MLIS program information: FIMS Intranet (e.g., grading guidelines, adding and dropping courses) [link to website, requires FIMS login]
- FIMS graduate program policies: FIMS Intranet (e.g., appeals, accommodations, code of conduct, leaves of absence) [link to website, requires FIMS login]
- School of Graduate and Postdoctoral Studies: [link to regulations website]

Attendance: Each lesson will include pre-recorded lectures, videos, and readings and some investigations to work through and reflect on individually before the synchronous class. Students are expected to complete asynchronous activities and attend weekly synchronous classes. Our "in-class" time will take up a portion of our 2-hour period, and the specific time will vary from week to week (see chart below for anticipated weekly times).

Absences: If you have any illness symptoms, or if you or someone you live with or are in close contact with tests positive but you're feeling okay, please contact me and we'll arrange to have you join the class by Zoom. If you're feeling ill or are otherwise unable to attend, also let me know in accordance with the MLIS attendance policy [link to policy, FIMS Intranet, login required].

Respect and collegiality: We are committed to the idea of the classroom as a place for respectful engagement across difference and a chance to learn from colleagues from a variety of backgrounds and value systems. Students are expected to behave collegially and professionally at all times.

Academic Integrity: A clear sense of academic honesty and responsibility is fundamental to our scholarly community. You are expected to demonstrate honesty and integrity in all of your academic activities. I am committed to the principle of teaching and learning as activities that are collaborative at their core therefore I strongly encourage collaboration while working on some assignments. However, unless specified as a group assignment, all submitted work must be your own, original work.

Statement on Academic Offences: Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following Web site:
http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_grad.pdf

Assignment submission: All assignments are to be submitted electronically, through OWL or Office 365. Page lengths for all assignments assume 1.0 spacing with a 12-point font and 1 inch/2.5 cm margins. Please include your course name and personal name on all attachments you submit through OWL. While there is no official style manual for this course, please make sure that you choose and consistently use a style that is appropriate to the assignments required in this course. Completeness of citations is more important than which citation style you use. We should be able to find every item you cite. Poor grammar, style or spelling will result in a lower grade.

Assignment deadlines: Treat this program like a job: barring illness or emergencies, we expect you to submit assignments by the deadline, which is 30 minutes before the beginning of class on the due date. However, we realize that a global pandemic changes everything. If something goes wrong and

you anticipate that you won't be able to submit an assignment by the due date, **please contact Pam as soon as you're aware you won't make it** to discuss alternatives. Some assignments depend on other people in the class, and all of the assignments culminate in the final project, so it's important both for you and for us that we're in good communication so we can all get through this term together.

Participation: MLIS guidelines for participation are available at
http://intra.fims.uwo.ca/students/handbooks/mlis/mlis-handbook-04.htm#P251_25303

Information on academic appeals and discipline: More information is available at this link:
https://grad.uwo.ca/administration/regulations/13.html

Support Services

Western is committed to reducing incidents of gender-based and sexual violence and providing compassionate support to anyone who has gone through these traumatic events. If you have experienced sexual or gender-based violence (either recently or in the past), you will find information about support services for survivors, including emergency contacts, here. To connect with a case manager or set up an appointment, please contact support@uwo.ca.

Health/Wellness Services: Students who are in emotional/mental distress should refer to Mental Health@Western http://www.uwo.ca/uwocom/mentalhealth/ for a complete list of options about how to obtain help.

Accessible Education Western (AEW): Western is committed to achieving barrier-free accessibility for all its members, including graduate students. As part of this commitment, Western provides a variety of services devoted to promoting, advocating, and accommodating persons with disabilities in their respective graduate program.

Graduate students with disabilities (for example, chronic illnesses, mental health conditions, mobility impairments) are strongly encouraged to register with **Accessible Education Western (AEW)**, a confidential service designed to support graduate and undergraduate students through their academic program. With the appropriate documentation, the student will work with both **AEW** and their graduate programs (normally their Graduate Chair and/or Course instructor) to ensure that appropriate academic accommodations to program requirements are arranged. These accommodations include individual counselling, alternative formatted literature, accessible campus transportation, learning strategy instruction, writing exams and assistive technology instruction.

Academic Considerations: If serious problems arise during the semester (medical or family issues; serious stress or well-being issues; falling seriously behind; or other circumstances that compromise your ability to succeed in the course and your wider program of study but that don't fall under the umbrella of academic accommodations) please let me know as soon as possible – I may be able to help. If you run into difficulties that mean you'll fall behind in multiple courses, please contact Brandi Borman (bborman@uwo.ca) and she can help negotiate with individual instructors.

Methods of Evaluation: Assignment details

External/crisis communication case study   20%
due 6:00 PM 29 September

Learning outcomes: On successful completion of this assignment, you will be able to:

1. Identify internal and external stakeholders and their possible communication needs related to a small-scale crisis for a specific information organization (Course-level learning outcome 2);
2. Apply approaches to communication planning; relevant legal, policy, and ethical frameworks (e.g., access to information and privacy); professional values and standards; and an awareness of social responsibility to the development of a crisis communication plan that responds to stakeholder needs and organizational risks and potential consequences for an uncertain and developing situation (Course-level learning outcome 1, 3, 4, 5, 6);
3. Develop a clear and effective message for an external stakeholder group appropriate to the specific crisis, the organization, the audience, and the chosen communication format (Course-level learning outcomes 2);

Scenario: Your information organization has experienced a minor crisis. The immediate situation is being dealt with but now you need to decide who needs to be informed and how. Choose one of the following scenarios and imagine that it's happening in a real information organization of your choice:

o Your community is experiencing an outbreak of an infectious disease (you choose: another new COVID-19 variant, monkeypox…) resulting in a fairly major curtailment of a) access to your organization's services and collections or b) a new intensification of protective measures like mandates to distance, mask, show proof of vaccination. You can decide what the current level of service/protective measures is (either use what's current in your imagined location at the time the assignment is due, or use your imagination), so long as the new level represents a significant restriction in either case.

o Heavy rains over the weekend have overwhelmed the city's storm sewers. There's water in the low-lying regions of your building and, because storm and sanitary sewers are combined, there may be sewage as well. Your institution faces material destruction and service disruptions but you don't yet know the extent of either.

o A user who says they represent a group of disgruntled citizens has complained about one of the programs you're offering (you get to choose the program – make sure you specify it in your communication). You're not going to cancel the program.

For whichever scenario you choose, ask yourself the following questions:
- What internal (e.g., management, staff, union local, governing body or host organization) and external stakeholders (everyone else: see the diagram in the lecture for examples) are important to notify? Immediately? Down the road? What adverse publicity might arise from this incident? What consequences might occur?
- What tough questions do you need to be prepared for?
- What kinds of external stakeholder communication are needed in this situation? What communication formats are most effective for each (e.g., face to face, telephone, social media)?

Then write and submit to OWL:

- A brief communication plan (can be point form) that responds to these questions;
- A 1-2 page (single-spaced, 1" margins, 11-12 point font) communication for an external stakeholder or stakeholders (e.g., emergency announcement, letter, press release, script for a TikTok video, Twitter campaign).

You may find it helpful to consult:

Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: Neal Schuman. Chapter 4. Writing (pp. 63-90). Chapter 9. Applications: Writing, sections 9.1 When to write and when not to write, 9.2 Internal Communications versus External Communications, 9.3 Messages (307-320); 9.13 PR, Publicity, and Promotion (353-367). [link to OPAC record]

Thenell, Jan. 2004. *The library's crisis communications planner: A PR guide for handling every emergency.* Chicago: American Library Association, Chapters 4. Identifying library audiences and stakeholders 20-25, 7 Building positive media relationships 44-51, 8. Communicating during a crisis 52-59, 9. After the crisis: a time of opportunity 60-66. [link to OPAC record]

Team assignment due 6:00 PM 27 October   30%

Three group-graded components: one member submits on behalf of the team (25%)
- Team process documents (5%)
- Presentation (10%)
- Report (10%)

One individually-graded component: Self/team assessment (5%), to be completed and submitted independently by each member of the team.

The purpose: To support members of the class in making decisions for their Planning and Budgeting Case Study, each team will
- search, summarize, and synthesize relevant resources
- identify best practices and make recommendations
- write a formal report and create and record a 10-minute presentation to the class

on a contemporary workplace/management topic for information organizations generally.

The Process:
- Collaboratively apply teamwork and project planning theories and approaches to set process and project goals and expectations (Course-level learning outcome 1)
- Collaboratively develop a project plan that defines and analyzes the problem and identifies work tasks needed to achieve team goals (Course-level learning outcome 1);
- Collaboratively and constructively assess team members' individual strengths and learning goals and assign tasks equitably and appropriately to meet team goals (Course-level learning outcome 1, 2);
- Carry out a project plan to achieve team goals by completing and coordinating work tasks and responding constructively and collaboratively to ambiguity and change (Course-level learning outcomes 1,2,5);
- Reflect individually and collaboratively on process and task challenges and successes in the spirit of intellectual inquiry (Course-level learning outcome 5).

The Project:

- Effectively search, summarize, and synthesize professional practice, policy/legislative and/or research resources as appropriate for your topic, identifying key findings, significant trends or exemplars, issues/controversies, and other considerations that students should take into account in making decisions related to this topic for their Planning and Budgeting Case Study;
- Apply theories and approaches to management; professional values and standards; legal, policy, and ethical frameworks; and an awareness of overarching social responsibility and power as appropriate to identify best practices and make recommendations for classmates (Course-level learning outcome 1, 3, 4, 6);
- Apply professional communication principles to create oral (presentation) and written (formal report) professional genres that effectively communicate findings, best practices, and recommendations to a classmate audience (Course-level learning outcome 2).

Resources

Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: Neal-Schuman, Chapter 7, Working in groups 197-237; Chapter 9 Producing texts (section 9.6 Reports 328-330, 9.6.2 Formal reports 336-337); Chapter 8, Making Presentations (sections 8.1 General considerations 249, 8.3 Making a presentation yourself 256-272). [link to OPAC record]

How it works:

By the beginning of class on October 6, you'll be assigned to a team and topic (number of teams will depend on number of students in the class):

- **Team 1: Planning community outreach initiatives:** What might information organizations do to identify their community, assess its needs, and develop effective community outreach initiatives? What possibilities does community outreach open up and what challenges does it bring for both managers and workers?
- **Team 2: Outsourcing/contracting out functions or services:** What aspects of the operation of information organizations might be outsourced or contracted out? What possibilities does outsourcing/contracting out open up and what challenges does it bring for both managers and workers?
- **Team 3: Engaging in collaborations, partnerships, and consortia:** What aspects of information organizations might operate through partnerships/consortia? What possibilities do partnerships and consortia open up and what challenges do they bring for both managers and workers?
- **Team 4: Hiring workers on part-time and/or on short-term contracts:** Under what circumstances might information organizations want to hire workers on a part-time or on short-term contract basis rather than hiring permanent full-time employees? What possibilities do these kinds of employment relations open up and what challenges do they bring for both managers and workers?
- **Team 5: Employing professional versus paraprofessional workers:** Under what circumstances might information organizations want to hire paraprofessional as opposed to professional employees? What possibilities do these decisions open up and what challenges do they bring for both managers and workers?
- **Team 6: Implementing user self-serve, reduced-staff, and staffless initiatives:** What aspects of information organizations might be operated on a reduced-staff or staffless/user self-serve basis? What possibilities do these arrangements open up and what challenges do they bring for both managers and workers?
- **Team 7: Engaging unpaid workers: volunteers and interns:** Under what circumstances might information organizations want to engage unpaid workers (both volunteers and interns)? What

possibilities do these kinds of arrangements open up and what challenges do they bring for both managers and workers?

- **Team 8: Innovative small-scale initiatives:** What kinds of innovative small-scale initiatives (e.g., that you could do with $20 000) information organizations are engaging in right now?

You'll be able to see your topic and team membership in OWL Site Info (Groups I am a member of).

We'll spend the entire October 6 class talking about team work and team projects, and we'll do some team creation activities to set you off on the right foot.

The process: In your asynchronous and synchronous activities the week of October 6, you'll work individually and collaboratively toward creating the team process documents that will support your work on the project. Templates will be provided in class:

1. A team strengths inventory that identifies individual members' strengths and learning;
2. A team charter that sets the team's goals and expectations;
3. An initial project plan that a) initially identifies tasks, interdependencies, deadlines, and members responsible and b) provides a mechanism to update progress and adjust tasks, deadlines, and assignments as the project progresses;
4. A post-project team self-evaluation.

The project: Each team is responsible for researching its topic and presenting its findings and recommendations in two distinct communications.

1) a brief professional report (3-5 single-spaced pages, single-spaced, 11- or 12-point font, 1 inch margins; see Ross and Nilsen Section 9.6); and
2) a professional recorded presentation (e.g., a video or slide deck with audiovisual or voice-only overlay and captioning) no more than 10 minutes in length. (See Ross and Nilsen 2013 Sections 8.1 and 8.3).

Both of these items will be posted to OWL Course Content so everyone in the class has access to them as resources to support the final Planning and Budgeting Case Study.

Strategies for success:

- Pay attention to the learning outcomes;
- Keep your findings and recommendations at a general level so they're appropriate for the variety of information organizations your classmates may want to use for their Planning and Budgeting Case Study. For example, consider how your topic might play out similarly or differently in different types of information organizations (e.g., public vs academic vs special libraries, libraries vs archives) and what different kinds of organizations might learn from one another's challenges, best practices, innovative recent exemplars?
- Note that the presentation won't be long enough to duplicate your entire report; you'll have to make decisions about what to exclude and what to summarize;
- You may wish to record a narrated PowerPoint presentation and upload it to Youtube for captioning. If you do this, you may mark your video as "unlisted" to prevent it from being discoverable through search. Here's a video tutorial on how to do this: https://youtu.be/XaAUaMT0Nvc A pdf guide is also attached to the Assignment entry.

Planning and budgeting case study   25%

Learning Outcomes: On successful completion of this assignment, you will be able to

- Identify an innovative small-scale initiative that responds to a specific organization's needs and circumstances (course learning outcome 5); e.g., organizational structure, governance, culture, stakeholders (course learning outcome 1) and the broader context in which the organization operates (course learning outcome 6);
- Apply theory and current practices in planning and management to create a feasible plan and budget. Justify both items and costs in relation to organizational and professional goals, values, and standards (course learning outcome 4) in compliance with relevant legal, policy, regulatory and ethical frameworks (course learning outcome 3);
- Integrate and synthesize a variety of sources (e.g., professional and scholarly literature, course discussions and presentations, legislation and policy) to design and create an effective and persuasive budget case appropriate to the intended audience (course learning outcome 2)

Scenario: Imagine that you've been hired for a real position of interest in an existing information organization. This may be the organization you choose for your organizational chart investigation and the job ad you choose for your exploration of information professions, or another position with a real information organization.   If you can't find a position for the organization you want use, you may choose a position for another organization of the same kind and fictionalize it to imagine it's in your organization. **You'll need a job ad or description for your position to submit with your proposal.**

Your manager calls an all-staff meeting and announces that the organization has funding available to support one innovative initiative (project/program/event/collection, etc.) that supports the organization's goals and values, serves one or more of its stakeholders, and is feasible within the organizational structure and culture. All staff members are encouraged to submit a proposal, including a budget and plan, for consideration. The winning proposal will receive up to $20,000 to carry out their initiative. You'll complete this assignment in two parts.

Part a. (ungraded) Initial pitch to CoP review partner; giving and receiving feedback (students set own deadlines in advance of 6 PM 11 November).

Create a first draft of a potential pitch for initiative. You don't need any numbers here, and you won't be handing this in. The focus is on making the case for why your initiative is important and worthy of funding a) in general and b) for **this** organization at this time. Everyone will understandably be at a different point with respect to thinking about their final assignment. The further along you are, the more useful your peer feedback will be.

In class on July 12, the Communities of Practice will divide reviewer/reviewee roles. You'll need to share your draft, job description, and your reviewee preparation document (posted in the OWL lesson) in time for the reviewer to prepare their feedback by 6 PM on July 19 class. You'll exchange constructive peer feedback in your CoP in the synchronous July 19 class. Use it to strengthen your pitch!

Part b. Full assignment (Due by 6:00 24 November)   25%

Write a proposal to your manager, providing a compelling description of the initiative you propose and a justification for the budget you have requested. This proposal will contain two elements that should succinctly make it clear:

a. why the institution should contribute resources to initiative and why now. Write a narrative case for why your initiative is worthy of funding in general, and why it's important to this organization at this time. Explain what benefit your proposed initiative will have for the organization (e.g., how it aligns with the organization's structure, culture, goals, vision, with the needs and desires of stakeholders, with professional values and standards, with trends in the broader context);

b. what resources you're asking the organization to contribute (e.g., money, space, collection, technology, staff), which are already available in the organization and which do you need to request. Create a budget table identifying and justifying your categories of spending. For instance, if you need to buy specialized equipment, note what and how much/many you will need and why. Provide a justification for the number, level and hours (e.g., full-time, part-time, contract) of employees and/or volunteers you propose. Make sure to indicate how many hours of your time will be required and how many need to be requested in the project budget. **Remember to include your imagined job ad or job description so it's clear what elements of this project would fall within your regular workload and wouldn't need to be funded by your $20 000 budget.**

Provide enough information that a reader external to your organization will be able to understand your case.

This assignment has a 10-page (single-spaced, 11- or 12-point font, 1 inch margins) maximum page limit, including budget documents and references. Submit to OWL:
- Your proposal
- Your job description or ad

You might find it helpful to consult these readings on planning and budgeting:
- Moran, Barbara B., and Claudia J. Morner. *Library and Information Center Management, 9th Edition*, ABC-CLIO, LLC, 2017. *ProQuest Ebook Central*. [[link to OPAC record](#)]
  - Chapter 4. Strategic planning, decision making, and policy (sections on strategic planning and decision making: 79-102)
  - Chapter 19. Library finance and budgets (Read pages 467-479: you may want to read the last ten pages to get a sense of different budgeting models and accountability concerns, but for this assignment you're doing a lump sum/line item budget .
and
- Ross, Catherine Sheldrick and Kirsti Nilsen. 2013. *Communicating professionally*. Chicago: Neal-Schuman. [link to OPAC record](#) Section 9.1.4 (pp.367-371) on writing a compelling proposal.

Appointments Committee Case Study (two parts)   20%
   a. Initial assessment due 6:00 PM ~~November 10~~ December 1
   b. Reflection on Community of Practice discussion due 6:00 PM ~~November 17~~ December 8

Learning outcomes
Upon successful completion of this assignment, students will be able to:
- Apply Human Resources approaches (course learning outcome 1); relevant legal, policy, and ethical frameworks (e.g., Collective Agreement, equity and diversity legislation; course learning

outcome 3); and professional values and standards (course learning outcome 4) to develop an effective applicant evaluation tool for an information organization;

- Rank fictional job applicants according to a framework and justify rankings;
- Reflect critically on the values at play in applicant evaluation and on the social responsibility and power associated with hiring processes in information organizations (Course-level learning outcome 6);
- Engage with ambiguity in the spirit of intellectual inquiry by collaboratively discussing applicant rankings and compiling a short-list consistent with the job ad, Collective Agreement requirements, and institutional and legislative EDID provisions (course-level learning outcomes 2, 5).

The scenario: Imagine you are a new Librarian/Archivist at Western Libraries and you have been elected to your first Appointments Committee and designated as the Equity representative.

Part 1, due by 6 PM December 1.
In advance of your December 1 committee meeting, you have been asked to:
1. Read the job ad, taking particular note of the Rank and type of appointment
2. Review the Librarians' and Archivists' Collective Agreement http://uwo.ca/facultyrelations/faculty_relations/libarchs/collective_agree.html, in particular
   a. the Appointments article to understand the expectations for this Rank and appointment type (Clauses 1-4) and the responsibilities of the Appointments Committee (Clause 7);
   b. the Responsibilities of Members article (Clauses 1-5) to understand the categories of work the successful applicant will be expected to do, and
   c. the Promotion and Continuing Appointment article (General clauses [1-3], Consideration for Promotion and/or Continuing Appointment [Clause 7], and Criteria for Promotion and Continuing Appointment [Clauses 9-15, focusing on the requirements relevant to the rank specified in the job ad]) to understand the successful applicant's anticipated career trajectory and the qualifications and timeline they will be expected to achieve once appointed;
3. Read the Letter of Understanding to understand the expectations for Equity representation on search committees (same url). Imagine that this week's lectures are your Equity training session.
4. Read *Western's Employment Equity Guide*, pp. 1-14, paying particular attention to page 11, Reviewing applications. https://www.uwo.ca/facultyrelations/pdf/recruitment/Western-Employment-Equity-Guide.pdf
5. Go back to the job ad and create a résumé screening tool with evaluation criteria and indicators of quality (see the example attached to the Assignment in OWL).
6. Use your screening tool to review the résumés and cover letters of all 10 applicants (attached to the assignment), making careful notes to justify each of your assessments. Identify your top three candidates and come to class prepared to discuss all 10 with the Appointments Committee (your Community of Practice) and develop a short-list of 2-3 candidates to invite for interview.
7. Write a brief reflection (no more than 500 words) on the values at play in the initial applicant evaluation and on the social responsibility and power associated with hiring processes in information organizations. Ask yourself questions like: What decisions did you have to make in creating the evaluation tool, how well did your tool work and how would you change it if you were doing it again? How do the legislative, policy, and Collective Agreement requirements

shape the expectations on job applicants and the work of those making hiring decisions for this employee group at Western?

By 6:00 PM on December 1, submit to OWL
- the completed screening tools for your **top three** candidates,
- your reflection.

Part 2, due by 6 PM December 8
In class on December 1, your Community of Practice will become the Appointments Committee and will meet to compile a short-list of candidates.   You will receive further guidance in class.

After class, write another brief reflection (no more than 500 words) on the on the values at play in the Appointments Committee short-listing process and on the social responsibility and power associated with hiring processes in information organizations. You might ask yourself questions like: How did the legislative, policy, and Collective Agreement requirements shape the work of the Committee?   To what extent did the committee discussion change/reinforce your views of your initial evaluations? How do the legislative, policy, and Collective Agreement requirements shape the expectations on job applicants? Have you learned anything from this exercise that you might take into your own job search experience?

Preparation, engagement, and learning (Due three times throughout the term: feedback on each component, graded end of term) 5%

Objectives: This assignment gives you a chance to:
- Reflect on your learning in the course and on your contributions to the learning of the class as a whole;
- Evaluate your own learning and contributions, identifying high points and challenges;
- Assess your professional competencies with reference to course-level learning outcomes (and other professional competency statements if desired), identifying areas of mastery and places for continuing education, areas of preference in professional practice and areas you want to avoid.

1. Complete the initial goal-setting exercise due **8 September, 6:00 PM**
https://forms.office.com/r/ej8k471JXN (on MS Forms, requires @uwo login)

As you begin each module, pay attention to the learning outcomes it focuses on. Make note for yourself of your aha moments, your frustrations, your tiny-step-by-tiny-step learning, that time when your insight came right after you submitted the assignment.

Also make note of your written (e.g., an anonymous contribution to a collaborative document) or verbal (e.g., a comment you made in a synchronous conversation) contributions to small-group- or class-wide learning. For examples of satisfactory and unsatisfactory contributions, and guidelines to evaluating participation in the MLIS program, please see the FIMS Intranet.

At midterm and the end of term, complete the required self-assessment of your preparation, engagement, and learning in this course. These will give you an opportunity to identify the contributions that stand out the most for you, both those that represent your most significant learning moments and those that represent a continuing puzzle you're still working to solve.

2. Midterm self-assessment due **20 October, 6:00 PM** (MS Forms link will be posted in the OWL lesson)

3. Final self-assessment due **8 December, 6:00 PM** (MS Forms link will be posted in the OWL lesson)

You'll receive brief interim feedback on each component through Microsoft Forms, and your end-of-term grade and overall feedback will be posted to OWL assignments.