LIS 650
Sunshine University Case Study Report

The McGregor Group

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Memo

To:	Penny
From:	Your friends, The McGregor Group
cc:	Dr. Julia Hersberger
Date:	3/28/2020
Re:	Encouragement and Support

We wanted to say how privileged we feel to have had the opportunity to get to know you so well over these last few months, both personally and professionally. You are an intelligent person with such positive intentions and we appreciate you coming to us for advice on how to keep your library functioning at its best. Please know that we've taken this seriously and have put a great deal of thought into how best to enhance your management skills while also teaching you new techniques and strategies.

All good strategies first begin by breaking down what may feel like one larger problem into smaller, more manageable pieces. This is exactly what we've done for you. We feel that once you begin implementing these changes that you will find each step to be just a little easier along the way. Below are the categories of your current job situation that we've broken down.

1. Communication
   - Treat coworkers with respect
   - Consider assertiveness training
   - Consider having an open and honest conversation with Sheldon
   - Strengthen communication with your staff
   - Assess your team effectiveness

2. Organization
   - Choose a method of organization which you feels works for you
   - Focus on organizing your workspace
   - Consider what to digitize to minimize workspace clutter

3. Time Management
   - Set and prioritize goals
   - Keep a log on daily activities
   - Use the Eisenhower Matrix, a system to assist in prioritizing your tasks

4. Perceptual Problems
   - Gather sufficient information about other people's behavior and attitudes to encourage more realistic perceptions
   - Examine your conclusions to ensure their validity before acting
   - Differentiate between facts and assumptions in determining the basis of your perceptions
   - Work to distinguish between various aspects of a person's behavior
   - Identify your true feelings as a way of eliminating or reducing projections

5. Stress and Wellness
   - Attend seminars on professional development
   - Visit other libraries to observe their classification of how things are run
   - Consider partaking in mindfulness meditation

We feel confident that if you follow the steps we've outlined within those categories that you will feel much less overwhelmed, and the goals which you've set for your library and yourself will come to fruition! Let's all meet up at the Coconut Hut bar this Friday and talk about this in person.

Your friends,

The McGregor Group

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Description

Penny is a Systems Librarian in the SSU Engineering Library, and is facing a significant amount of stress around her job and her managerial responsibilities. A series of failures of the perceptual process and related attributional biases are negatively affecting her relationships with colleagues and employees, and in turn they are limiting her effectiveness as a manager, as well as impacting her personal life and her mental health. We believe that by applying management and leadership theory to Penny's circumstances and mindset, we may alleviate some of these issues she is experiencing at work. Penny's main job is to provide technical support to the library. A large portion of her workload is to offer training on new technology to her staff, but Penny feels she isn't given adequate enough time to learn about the new equipment and complete the work successfully. Her work situation needs to be evaluated and some options and proposals need to be put into place so the entire library staff will be better trained and productive.

Diagnosis

In order to assess the situation holistically, Penny, her supervisor Sheldon, and several other members of the library staff were consulted. Based on those discussions, it seems that Penny's work issues seem to be primarily in the areas of communication, organization, and perception.

Penny seems to have problems properly communicating with the library staff, especially Sheldon. The upward and downward communication process between Sheldon and Penny is broken. She feels that Sheldon is just buying whatever equipment he wants without checking with her to see if it will actually work in the library, but has not addressed this with him directly. She also sees a substantial discrepancy between her performance and Sheldon's assessment of her performance. At this point, there is not an open, comfortable environment for information sharing. Penny also seems to struggle with her communication with the rest of the library staff. They report that she is very vague with the staff when they ask her to explain something to them, and that their work never meets her great expectations. Because Penny feels that the entire staff dislikes her, she has become unapproachable in the workplace. According to her testimony, Penny struggles with non-verbal communication. She admits that she is not actively listening and is unaware of the unconscious message she is sending to others when she is more focused on her laptop at meetings, as well as when she's muttering to herself and rolling her eyes (Moniz, 2010, pp. 83-100).

Penny also struggles with her organizational skills in a variety of multifaceted ways. Her organizational issues manifest on a physical level in that her office is disorderly, with her books, manuals, papers, cables, and technological equipment cluttering her office space. Subsequently, Penny's organizational issues also manifest on a mental level that affects her ability to

successfully organize her daily schedule. She does not appropriately plan her meetings and training sessions with her staff, and because of this, she is forced to rush through the content and is unable to provide adequate hands-on time to her staff with the technology she expects them to learn about. Furthermore, because Penny fails to plan and organize her daily routine, her time management skills subsequently suffer. She reports that she often skips breakfast and has a quick lunch in order to have more time for work, which leaves her hungry later in the day, even though she also reports that she often skips her lunch to train her staff. More importantly, she also fails to make efficient use of her time, spending all morning answering emails and dealing with multiple miniscule problems and questions, rather than focusing on her chief responsibilities. Penny is quick to let others know that she doesn't have time to do her normal tasks because of the various other things she is doing, and this causes further tension in the workplace. If Penny begins to work on bettering her organizational and time management skills, many of these problems may be eliminated over time.

Finally, it is important to note that Penny inadvertently creates problems for herself and her staff by having faulty perceptions about her workplace and her coworkers. Penny suffers from attributional biases that cause her to misattribute the causes of her coworkers' behaviors and their reasons for reacting to her the way they do. A prime example of this is how she projects her own feelings about her supervisor, Sheldon, back onto him in a passive-aggressive manner. She calls him "mean," while she is the one who attempted to sabotage his career by bringing up his past questionable decisions in front of his supervisors, rather than addressing the issue with him directly. This is only one example of Penny's suffering relationship with Sheldon, and how her actions consequently create a self-fulfilling prophecy. In response to Penny's treatment, Sheldon purposely removes her from all facets of his decision-making processes, which leads Penny to perceive his behavior in a negative light (Gordon, 2001, p.35). Because Penny attributes her troubles in the workplace to the incorrect sources, she therefore suffers from the attributional bias, "self-concept." This means that in order to maintain a positive self-concept, Penny often attributes her struggles in her new position to things outside of her control, like lazy coworkers, or her supervisor's dislike of her (Gordon, 2001, p. 42) even though they are not the true sources of her struggles.

Recommendations

In order for Penny to begin working on correcting how her perceptual process and related attributional biases negatively affect her relationships with her colleagues and employees, she must first begin to focus on the foundations of a healthy mind and climate in the workplace. These foundations include communicating with others more effectively, improving organizational skills, managing time more efficiently, focusing on the aforementioned perceptual issues, and finally, taking time to center and focus on her overall health and wellness.

1. **Communication**
   - Penny should work to treat her coworkers with respect, and in turn they may become even more respectful of her. People notice if you aren't paying attention or if you roll your eyes, so she needs to be mindful of this whenever she is interacting with others.

- Assertiveness training (possibly in the form of an audio book or webinar) is recommended for Penny as clear and concise communication is imperative for having a more open, honest dialogue between herself and her staff and colleagues. This open and direct dialogue approach will help Penny to better understand the motivations of others while respecting their time and her own.
- After assertiveness training, Penny might consider speaking directly with Sheldon to ask for his expectations of her. If she does not want to directly ask for his expectations, she may be able to use her training to explain her current understanding of her expectations, and then allow him to respond. She can further advocate for what she wants this relationship to be like using Fells readings.
- She needs to strengthen communications with her staff. *See Managing Learning in the Workplace.* Create appropriate conditions, reinforce desired learning behaviors, provide environmental cues that encourage learning, use modeling strategy (Gordon, 2001, p.45).
- Assess her team effectiveness Figure 6-5 (Gordon, 2001, pg.171).

2. **Organization**
   - Penny should consider choosing a method of organization which she feels works for her, then proceed forward with that plan to establish a solid foundation. There are an almost limitless number of systems, websites, books and more that offer different specialized approaches to staying organized, and Penny should be encouraged to do her own research and find a selection that works for her. As a starting place, Merlin Mann's 43 Folders system and website have been popular for years. It presents its own organizational system and recommends all sorts of other resources in that vein, including David Allen's book *Getting Things Done*. This early blog post is a good starting point (http://www.43folders.com/2004/09/08/getting-started-with-getting-things-done).
   - Since clutter and disorganization can be a major distraction, Penny needs to focus on organizing her work space. We know that Penny has issues with a cluttered desk, as the case study says, "Books, manuals, papers, cables and every piece of tech equipment known to mankind seems to be piled around the office."
   - Penny should consider what she could digitize to alleviate clutter in her physical workspace. She will also need to organize her job in a way that makes sense to her. She should spend time prioritizing tasks and create a daily schedule that works best for her and her employees. She might consider creating a training schedule (once a week from 3pm-4pm) she can introduce whatever new technology is out there, or even a 90 second PD video that she sends once a week. She can use schedule send on Google. She can create a resource document that is easily accessible at all times by all. Some of these meetings she could have online and record to post on her resource document.

3. **Time Management**
   - Penny needs to set goals and prioritize what needs to be done instead of tackling her emails first. (Cochran, J. W., "Personal Time Management Techniques") Also, see the Eisenhower Matrix below (https://www.developgoodhabits.com/eisenhower-matrix/). She should focus on doing the urgent/important tasks first. If there is time she should develop a plan for the important but not urgent tasks next. She should delegate the urgent

but not important tasks and eliminate the not-important/not-urgent tasks completely as they are a waste of precious time.

	URGENT	NOT URGENT
IMPORTANT	1 DO	2 PLAN
NOT IMPORTANT	3 DELEGATE	4 ELIMINATE
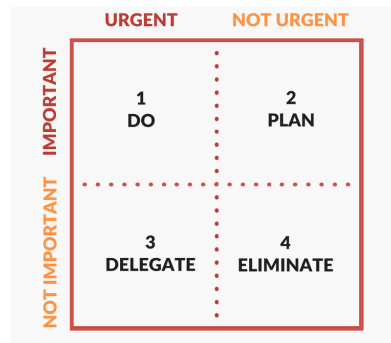
- Per the Time Management Handout, Penny can try keeping a log of her daily activities for a few days and see where her time is spent the most. This might help her see what tasks are more important than others and if she is spending too much time on less urgent tasks. She can also assess if her tasks are active versus reactive. Appropriating these tasks might aid in having less stressful interactions. ***(Use of the Time Management Handout by Dr. Hersberger from Week 7).***
- Once Penny has implemented a more organized system, she should reprioritize her time and responsibilities, delegating where appropriate and better understanding the responsibilities of others. This also includes prioritization of food and breaks which will help reduce stress and anxiety throughout her day. The Eisenhower Matrix above can be a guide for this process as well.

4. **Perceptual Problems**
   - In *Organizational Behavior: A Diagnostic Approach*, Judith Gordon suggests five steps for increasing perceptual accuracy that all have relevance for Penny's current situation (Gordon 2001, p. 38).
     a. **Gather sufficient information about other people's behavior and attitudes to encourage more realistic perceptions.**
        Penny needs to meet with Sheldon and her supervisees individually in order to establish a pattern of open and direct communication in order to develop for the following steps.
     b. **Check conclusions to ensure their validity.**
        It is important for Penny to discuss her work-life balance with Sheldon in order to clarify both of their expectations around hours and workload. Penny currently assumes that the more hours she works, the more she will be respected, but this may not be the correct perception.
     c. **Differentiate between facts and assumptions in determining the basis of perceptions.**

A particular focus of Penny's discussions with Sheldon should be his suggestions for grant writing. She needs to determine if this is an essential task, or if it can wait until things are further stabilized.

    d. Distinguish among various aspects of a person's behavior.
Penny must undertake an elaborate evaluation of her subordinates' jobs and job responsibilities, preferably with the involvement of other colleagues, in order to examine the truth of her perception that they are all "idiots and slackers".

    e. Identify true feelings as a way of eliminating or reducing projections.
As challenging as it might be, Penny needs to consider if there are larger feelings surrounding her role that create negative perceptions. Does Penny feel that this is the right role for her right now, or is looking for another job a better plan, even though it might be scary?

5. **Stress and Wellness**
   - It could be beneficial to have Penny attend some seminars on professional development and visit SSU's peer libraries to see how they keep their departments organized. Networking with people outside her normal professional realm will also help reduce stress and build positive communication techniques.
   - Consider mindfulness meditation or other personal techniques for reducing overall stress.
   - Penny might find relief once she gets a better grasp on her professional life

Evaluation

Below are the strategies, streamlined for Penny's convenience, followed by a summary. This streamline can serve as a checklist for Penny to refer to when assessing her progress.

1. Communication
   - Treat coworkers with respect
   - Consider assertiveness training
   - Consider having an open and honest conversation with Sheldon
   - Strengthen communication with your staff
   - Assess your team effectiveness

2. Organization
   - Choose a method of organization which you feels works for you
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   - Consider what to digitize to minimize workspace clutter

3. Time Management
   - Set and prioritize goals
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   - Work to distinguish between various aspects of a person's behavior
   - Identify your true feelings as a way of eliminating or reducing projections

5. Stress and Wellness
   - Attend seminars on professional development
   - Visit other libraries to observe their classification of how things are run
   - Consider partaking in mindfulness meditation or other similar activities

Based on our recommendations above, we feel confident that Penny can improve her relationships with her supervisors and her subordinates. If she adheres to the plan laid out, we are certain that she will be able to achieve her goals for herself and the library. If Penny works on communicating with others more effectively, improving her organizational skills, managing her time more efficiently, focusing on the aforementioned perceptual issues, and taking time to center and focus on her overall health and wellness, her relationships with herself and with her coworkers will continue to improve.

References

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Fells, R.E. (2012). *Effective negotiation: from research to results* (2nd ed). Cambridge University Press.

Gordon, J.R. (2001). *Organization behavior: a diagnostic approach* (7th ed)*.* Prentice- Hall.

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