

**DEVELOPING LIBRARY MIDDLE MANAGEMENT IN THE CONTEXT OF AN OPEN
DISTANCE LEARNING (ODL) ENVIRONMENT IN SOUTH AFRICA**

by

JANETTE RAUBENHEIMER

submitted in accordance with the requirements
for the degree of

DOCTOR OF LITERATURE AND PHILOSOPHY

in the subject

INFORMATION SCIENCE

at the

UNIVERSITY OF SOUTH AFRICA

SUPERVISOR: PROF P NGULUBE

FEBRUARY 2016

SUMMARY

Managing on the middle level of the academic environment has become an essential managerial competency, particularly in a large library of an Open Distance Learning (ODL) institution which serves 400,000 students with a diverse student profile. The research focus of this study in the ODL environment is thus on management and organisational theories that indicate what it takes to be a good manager.

This is a positivist case study which triangulates data collection methods. Quantitative data and qualitative data were collected. The findings indicate a 94,7% response rate to the survey questionnaire and 100% participation of the invited ODL middle managers in interviews. Interviews were conducted with ODL Library middle managers who operate on the level of supervisor, manager, deputy director and director. Findings revealed ODL Library middle managers' perception of success and that they worked and planned for career progression that was facilitated by relevant qualifications and experience, that the external support received from their families and the use of development strategies and various approaches, such as personal career planning; performing secondary management roles in the ODL Library; attendance at management short courses, all influenced their successful appointment as middle managers.

It further indicates that an optimum career path is influenced by factors such as ability, communication, hard work and determination. Development strategies pertain to management and leadership development which enable ODL Library middle managers to perform the role of manager in both a Library and Information Science environment, ODL environment and management environment which foster an understanding of their role in strategic planning. The most important competencies to be acquired are planning and administration, emotional intelligence and self-management, communication and teamwork. The study reveals that a high premium was placed on the importance of the selected success definitions, strategies and competencies, but that own success measured against these was lower. The subsequent recommendation is to develop ODL Library middle managers in terms of factors and strategies that lead to career success and to ensure the use thereof.

ACKNOWLEDGEMENTS

I would like to express my gratitude first and foremost, to my supervisor and promoter, Prof Patrick Ngulube, for constructive advice, guidance and support throughout the study.

I would also like to thank the following people as this thesis would not have been possible without their contributions during different phases of the study:

Colleagues at the University of South Africa (Unisa), namely Prof H Nienaber (Business Management) who assigned me as a Research Buddy in order to guide me on the role of middle management and the collection of data; Prof P Prinsloo (Research professor in ODL) for advice on the research concept; Dr E Archer (Specialist: Institutional Research) for assistance with the questionnaire design; Dr A Horne (Department of Human Resources) for guidance on staff development strategies in use at Unisa; Dr JC Henning (Deputy Executive Director: Unisa Library) for the review of the draft case study report; Unisa staff who participated in the pre-testing of the questionnaire and interview protocol and the middle managers of the ODL Library who participated in the questionnaire and interviews; and the University of South Africa for permission granted to involve Unisa staff and documents in the research study.

Significant contributions were also made by library colleagues outside the University of South Africa namely Prof J Golden (Associate Professor, Marshall School of Business, University of Southern California (Past President, ALA Library Leadership and Management Association) for input on the design of the survey questionnaire; middle managers of the Open University (United Kingdom) and the Nelson Mandela Metropolitan University (South Africa), who advised on the design of the questionnaire during the pre-testing.

Special mention is made for contributions received from Ms H Mulder (Statistician) for assistance with the interpretation of the quantitative data, Mr J van Niekerk for checking of the coding of the qualitative data; Ms M Burger for overseeing the list of references and Ms J de Wet for the final language editing and checking of the references.

DEDICATION

This thesis is dedicated to my husband and best friend, Pierre Raubenheimer, for his unconditional love, encouragement and support throughout this study.

DECLARATION

I declare that this study, **Developing Library Middle Management in the context of an Open Distance Learning (ODL) environment in South Africa**, is my own work and that all sources I have used or quoted have been indicated and acknowledged by means of complete references. This thesis does not incorporate, without acknowledgement, any material previously submitted for a degree or diploma at any university.


.....
Signature


.....
Date

TABLE OF CONTENTS

SUMMARY	i
ACKNOWLEDGEMENTS	ii
DEDICATION.....	iii
DECLARATION	iv
TABLE OF CONTENTS.....	v
LIST OF TABLES.....	ix
LIST OF FIGURES	x
LIST OF APPENDICES	x
LIST OF ABBREVIATIONS AND ACRONYMS.....	xi
CHAPTER ONE: INTRODUCTION TO THE STUDY	12
1.0 GENERAL INTRODUCTION.....	12
1.1 BACKGROUND TO THE STUDY.....	13
1.1.1 The need for Library middle management development.....	14
1.1.1.1 The complexity of the role of middle manager.....	15
1.1.1.2 Middle management capacity building and retention	15
1.1.1.3 Sustainability of the library.....	16
1.1.1.4 The need for ODL middle management development programmes.....	17
1.2 STATEMENT OF THE PROBLEM	18
1.2.1 Research purpose.....	18
1.2.2 Research objectives	19
1.2.3 Research questions	20
1.3 KEY CONCEPTS	23
1.4 IMPORTANCE OF THE STUDY	24
1.4.1 Originality of the study	25
1.4.2 Significance of the study	26
1.4.3 Assumptions.....	27
1.5 RESEARCH METHODOLOGY AND DESIGN.....	28
1.5.1 Research methodology.....	28
1.5.2 Research design	28
1.5.3 Sample frame.....	30
1.5.4 Data collection methods	30
1.5.5 Data analysis and presentation.....	31
1.6 ETHICAL CONSIDERATIONS	33
1.7 SCOPE AND LIMITATIONS	35
1.8 OUTLINE OF THE THESIS CHAPTERS.....	36
1.9 REFERENCING STYLE USED IN THE THESIS.....	37
1.10 CHAPTER SUMMARY	37
CHAPTER TWO: ODL LIBRARY MIDDLE MANAGEMENT CAREER DEVELOPMENT.....	39
2.0 INTRODUCTION	39
2.1 ROLE OF THE LITERATURE STUDY.....	39
2.1.1 Sources of information	41
2.1.2 Concept map of the research literature	44
2.2 DEVELOPING ODL LIBRARY MIDDLE MANAGEMENT	47
2.2.1 Management.....	47
2.2.1.1 Management process.....	48
2.2.2 Development.....	51
2.2.2.1 Development processes	52
2.2.3 Training and development.....	52
2.2.3.1 Role of the learning organisation in management development.....	53

2.3	USE OF THEORY IN LIBRARY AND INFORMATION SCIENCE RESEARCH	54
2.3.1	Categorisation of management theories	57
2.3.2	Organisation theory	59
2.3.2.1	Contingency model in organisation theory	60
2.3.2.2	Application of management theories to developing countries	61
2.3.3	Management competencies derived from management theories	62
2.3.3.1	Communication	64
2.3.3.2	Planning and administration	65
2.3.3.3	Teamwork	66
2.3.3.4	Strategic action	67
2.3.3.5	Globalisation	67
2.3.3.6	Emotional intelligence and self-management	68
2.3.4	Management perception of success	70
2.4	ODL LIBRARY FOUNDATIONS	72
2.4.1	ODL Library as a business	72
2.5	ROLE OF ORGANISATIONAL THEORY IN THE HIGHER EDUCATION ODL PRACTICE	74
2.5.1	Role of management in large versus small libraries	74
2.5.2	Impact of the organisational structure	75
2.5.3	Impact of managerial layers	77
2.5.4	Impact of the scope of activities	78
2.5.5	Management skills	79
2.6	IMPACT OF ODL ON THE ACADEMIC LIBRARY	80
2.6.1	ODL Library versus the academic residential university library	81
2.7	PARADIGM SHIFT IN MANAGEMENT AND RELATED LIBRARY SCIENCE	85
2.8	LIBRARY STUDIES ON MANAGEMENT DEVELOPMENT STRATEGIES AND FACTORS	87
2.8.1	Development strategies	88
2.8.2	Career development strategies in the ODL Library environment	91
2.8.3	Development factors	94
2.9	SYNTHESIS AND EVALUATION OF THEORY	97
2.10	CHAPTER SUMMARY	99
CHAPTER THREE: RESEARCH METHODOLOGY AND DESIGN FOR THE EMPIRICAL STUDY		101
3.0	INTRODUCTION	101
3.1	JUSTIFICATION OF THE RESEARCH PARADIGM AND METHODOLOGY	101
3.2	RESEARCH DESIGNS	105
3.2.1	Case study research design	106
3.3	VALIDITY, RELIABILITY AND GENERALISATION IN CASE STUDY RESEARCH	108
3.3.1.	Construct validity	110
3.3.1.1	Use of multiple source of evidence	111
3.3.1.2	Chain of evidence	112
3.3.1.3	Review of the draft case study report	113
3.3.2	Internal validity	114
3.3.3	External validity	115
3.3.4	Reliability	116
3.4	CHARACTERISTICS OF THE RESEARCH SITE	117
3.5	RESEARCH POPULATION	120
3.5.1	Characteristics of the population	122
3.5.2	Participant roles	124
3.6	SOURCES OF EVIDENCE	125
3.6.1	Survey questionnaire: quantitative data	125
3.6.1.1	Construction and layout of the questionnaire	126
3.6.1.2	Pre-testing the questionnaire	130
3.6.1.3	Selection of the pre-testing participants	130
3.6.1.4	Pre-test response	131
3.6.1.5	Administering the final questionnaire	132

3.6.2	Interviews: qualitative data.....	134
3.6.2.1	Administering the interview data	137
3.6.3	Document reviews: qualitative data.....	139
3.7	DATA ANALYSIS STRATEGY AND PRESENTATIONS OF RESULTS	140
3.7.1	The planned strategy of quantitative data analysis	141
3.7.1.1	Data analysis: quantitative data.....	143
3.7.2	The planned strategy of qualitative data analysis.....	147
3.7.2.1	Data analysis: qualitative data.....	147
3.7.2.2	The role of the researcher in qualitative research.....	149
3.8	EVALUATION OF THE RESEARCH METHODOLOGY.....	151
3.9	CHAPTER SUMMARY	152
CHAPTER FOUR: PRESENTATION OF RESULTS AND FINDINGS		153
4.0	INTRODUCTION	153
4.1	QUANTITATIVE DATA: QUESTIONNAIRE.....	154
4.1.1	Response rate.....	154
4.1.2	Presentation of quantitative results.....	156
4.1.2.1	Sequence of presentation of quantitative data	157
4.1.3	Contextualising the study	160
4.1.4	Concepts of success	163
4.1.5	Concept of development strategies that affect career advancement.....	165
4.1.5.1	Appointment contributor: Qualifications	165
4.1.5.2	Appointment contributor: Experience.....	166
4.1.5.3	Appointment contributor: Development approaches.....	167
4.1.5.4	Development needs of ODL Library middle managers	168
4.1.5.5	Continued career development strategies	169
4.1.5.6	Use of career development strategies	170
4.1.6	Concept of development factors that facilitate an optimal career path.....	172
4.1.6.1	External development factors.....	173
4.1.6.2	Internal development factors	173
4.1.7	Concept of managerial competencies that facilitate an optimal career path	175
4.1.7.1	Communication	175
4.1.7.2	Planning and administration	176
4.1.7.3	Teamwork.....	177
4.1.7.4	Strategic action.....	177
4.1.7.5	Globalisation.....	178
4.1.7.6	Emotional intelligence and self-management.....	179
4.2	QUALITATIVE DATA: INTERVIEWS	182
4.2.1	Presentation of qualitative data: Interviews.....	182
4.2.1.1	Sequence of presentation of qualitative findings	182
4.2.2	ODL Library middle management explanation of success.....	183
4.2.3	Development strategies that affect career advancement.....	184
4.2.3.1	Qualifications.....	184
4.2.3.2	Experience.....	186
4.2.3.3	Career development needs and strategies	186
4.2.3.4	Successful use of career development strategies	192
4.2.4	Development factors.....	193
4.2.4.1	External development factors.....	193
4.2.4.2	Internal development factors	194
4.2.5	Managerial competencies.....	195
4.2.5.1	Successful use of key managerial competencies.....	196
4.3	QUALITATIVE DATA: INSTITUTIONAL DOCUMENTS	201
4.3.1	Institutional perception of success.....	202
4.3.2	Development strategies.....	204
4.3.3	Development factors.....	209

4.3.4	Competencies.....	210
4.4	CHAPTER SUMMARY	211
4.4.1	ODL Library middle managers' perception of career success	212
4.4.2	Importance of development factors as facilitators of career success	213
4.4.3	Importance of development strategies as facilitators of career success	214
4.4.4	Importance and use of competencies as facilitators of career success	216
CHAPTER FIVE: ANALYSIS AND INTERPRETATION OF DATA		218
5.0	INTRODUCTION	218
5.1	PRESENTATION OF THE ANALYSIS.....	219
5.1.1	Scale reliability	220
5.1.2	Evaluation: career promotion constructs	222
5.1.2.1	Concept of career success	223
5.1.2.2	Concept of internal factors	224
5.1.2.3	Concept of external factors	225
5.1.2.4	Concept of career-success after appointment.....	226
5.1.2.5	Concept of career strategies.....	228
5.1.2.6	Concept of career competencies.....	229
5.1.3	A matrix of correlations	232
5.1.3.1	Calculation of a matrix of Spearman correlations.....	234
5.1.3.2	Pearson correlations: career advancement measures.....	236
5.2	DATA ANALYSIS AND INTERPRETATION	238
5.2.1	ODL Library middle managers' perception of success	240
5.2.2	Development factors and strategies as facilitators of the appointment.....	244
5.2.3	Development factors and strategies as facilitators of an optimal career path.....	253
5.2.4	Managerial competencies.....	264
5.2.4.1	Communication competencies	266
5.2.4.2	Planning and administration competencies.....	267
5.2.4.3	Teamwork competencies	269
5.2.4.4	Strategic action competencies	270
5.2.4.5	Globalisation competencies	272
5.2.4.6	Emotional intelligence and self-management competencies.....	274
5.2.4.7	Perceived importance of competencies compared to use	276
5.3	SYNTHESIS.....	277
5.4	CHAPTER SUMMARY	278
CHAPTER SIX: SUMMARY, CONCLUSIONS, RECOMMENDATIONS		280
6.0	INTRODUCTION	280
6.1	SUMMARY OF THE CONTENTS	281
6.2	SUMMARY OF THE FINDINGS	283
6.2.1	ODL Library middle managers' perception of success	284
6.2.2	External factors and development strategies: appointment facilitators.....	285
6.2.3	Internal factors and development strategies: facilitators of an optimal career path	287
6.2.4	Competencies: facilitators of an optimal career path	289
6.3	CONCLUSIONS	291
6.3.1	Conclusion on the ODL Library middle manager's perception of success.....	291
6.3.2	Conclusion on the ODL Library middle managers' perception of factors	292
6.3.3	Conclusion on the perception of the importance and use of development strategies.....	294
6.3.4	Conclusion on the perception of the importance and use of competencies	296
6.3.5	Overall conclusion on the research problem	297
6.4	RECOMMENDATIONS	298
6.5	FUTURE VALUE OF THE STUDY	300
REFERENCES		304

LIST OF TABLES

Table 1: Management and Leadership activities and tasks.....	50
Table 2: Categorisation of Management theories and related concerns	58
Table 3: Integration of management theories with competencies	64
Table 4: Comparison of development strategies identified by Golden (2006) and McGurk (2009)	91
Table 5: Factors impacting on career success	96
Table 6: Synthesis and evaluation of library science theory.....	98
Table 7: Case study	110
Table 8: Distribution of pre-test questionnaire	131
Table 9: Variables included in the questionnaire and collected variable measurements	142
Table 10: Response rate of completed electronic questionnaires	155
Table 11: Legend of analysis discussion	159
Table 12: Characteristics of the participants	161
Table 12a: Scale reliability test	222
Table 13: How respondents define success?	164
Table 14: Respondents' perceptions: own success measures against success definitions.....	164
Table 14a: Mean importance rating: success indicators and perceived own successfulness	224
Table 15: Frequency distribution of qualifications	166
Table 16: Appointment contributors: Experience	167
Table 16a: Mean perception scores: Factors of importance to appointment in current position.....	225
Table 17: Appointment contributor: Development approaches	167
Table 18: Importance perceptions of development strategies that affect performance	168
Table 18a: Mean perception scores of development needs	227
Table 19: Importance rating of development strategies to career success	170
Table 20: Use of development strategies after the appointment	171
Table 20a: Mean perception scores: Strategies of importance to perform in current position	228
Table 21: Perceptions of external factors that promote the middle management appointment.....	173
Table 21a: Mean perception scores for relevance of external factors to appointment in the current position.....	226
Table 22: Importance perceptions of internal factors to performing in ODL Library middle management position	174
Table 23: Communication	176
Table 24: Planning and administration	176
Table 25: Teamwork.....	177
Table 26: Strategic action	178
Table 27: Globalisation	178
Table 28: Emotional intelligence and self-management	179
Table 28a: Mean perception scores for the relevance of competencies	231
Table 29: Assessment of perceived personal success on managerial competencies	181
Table 29a: Rating means and deviations: Personal attainment and importance of managerial competencies	232
Table 30: Interview respondents by years of ODL Library service	182
Table 31: Spearman correlations: Success in being appointed and importance of factors and strategies in being appointed.....	235
Table 32: Pearson correlations: Personal success-attainment and perceived-importance-of-strategies-to-career advancement- measures	237
Table 33: Framework for ODL Library Middle Management development.....	346

LIST OF FIGURES

Figure 1: Concept map of the research literature and expected outcomes	46
Figure 2: Respondents by ODL Library Directorate	119
Figure 3: Informed consent and responses	156
Figure 4: Number of job changes	162
Figure 5: Age group profile of respondents	162
Figure 6: Language profile of respondents	163
Figure 7: Own success versus importance of success criteria	165
Figure 8: Qualification profile of respondents	166
Figure 9: Contributor to optimum career path success: Role of ODL Library middle managers	169
Figure 10: Importance and use of career development strategies	172
Figure 11: Contributor to optimum career path success: Important internal factors	175
Figure 12: Importance and use of managerial competencies	181

LIST OF APPENDICES

Appendix 1: Ethical clearance letter (survey)	321
Appendix 2: Ethical clearance certificate	322
Appendix 3: Pre-testing of the questionnaire	324
Appendix 4: Cover letter for survey questionnaire	325
Appendix 5: Survey questionnaire	326
Appendix 6: Questionnaire: follow - up message	335
Appendix 7: Ethical clearance certificate (interviews)	336
Appendix 8: Informed consent - interview	338
Appendix 9: Informed consent - recording the interview	340
Appendix 10: Cover letter for interviews	342
Appendix 11: ODL Library Interview protocol	343
Appendix 12: Pre-testing interview questions	345
Appendix 13: Facilitators of ODL Library middle management career success	346

LIST OF ABBREVIATIONS AND ACRONYMS

ACRL	Association of College and Research Libraries
CPD	Continuing Professional Development
EE	Employment Equity
EI	Emotional Intelligence
HR	Human Resources
IFLA	International Federation of Library Associations
IOP	Institutional Operational Plan
IPMS	Institutional Performance Management System
KPA	Key Performance Area
KM	Knowledge management
LIS	Library and Information Science
OPAC	Online Public Access Catalogue
ODL	Open Distance Learning
PARC	Professional and Administrative Research Committee
PDP	Personal Development Plan
RPL	Recognition of Prior Learning
SETA	Skills Education Training Authorities
Unisa	University of South Africa

CHAPTER ONE: INTRODUCTION TO THE STUDY

1.0 GENERAL INTRODUCTION

This research study falls primarily within the social sciences as it focuses on human resource development in the discipline of information science. The focus of the study is more particularly on middle management development in an Open Distance Learning (ODL) Library. The need for the research arose from the fact that there is no agreement as to what the best career path model for Library middle managers in the context of ODL libraries entails. The absence of a model poses a problem not only for the library environment (Golden 2006:175; McGurk 2009:466), but also in the ODL environment due to the lack of trained personnel in ODL institutions, particularly in Africa (Igwe 2011:2, 5). The challenge is to investigate what factors and strategies pertaining to staff development impact on ODL Library middle management development.

For the purpose of this study, however, the terms ‘middle management’ and ‘development’ need to be defined because within the library environment researchers sometimes refer to all sorts of library management, including library administrators, when using the term middle management (Rooney 2010:383). Floyd and Wooldridge (1996:111) define a middle manager as an individual who is regularly involved in the organisation’s operations and has some access to upper management. A middle manager is also defined as:

‘an employee of an organisation or business who manages at least one subordinate level of managers, and reports to a higher level of managers within the organisation. The duties of a middle manager typically include carrying out the strategic directives of upper-level managers at the operational level, supervising subordinate managers and employees to ensure smooth functioning of the enterprise’ (*Business dictionary*. 2013, sv ‘middle management’).

In this research the term middle manager is interpreted in terms of these definitions and the terms “line manager” and “supervisor” are used interchangeably to include both supervisors and managers” (MacNeil 2004:93).

Library managers should be equipped to react to the environments in which they operate in order to stay relevant. In the case of ODL Library middle managers there is a strong relationship with the Library and Information Science (LIS) environment, the ODL

environment and the business management environment. Functional management forms part of the latter and pertains to personnel management which includes human resource management, recruitment and selection, employee development and training, performance appraisal, discipline and grievances, developing managerial competencies, stress management and employee counselling (Cole and Kelly (2011:452). Since this study pertains to the development of middle managers, development aspects within functional management should be considered. Managers should also have an understanding of their own perception of success, the importance of development factors and strategies and their own success when applying the knowledge gained through these development factors and strategies.

Against this background, Chapter One introduces the study on developing Library middle management in an ODL environment by motivating the need for a study within this field of human resource development. It explains why Library middle managers need to be developed and what the focus should be when developing Library middle management against the background of factors that facilitate managerial success. It explains the focus of this study and examines the research problem, as well as the research purpose, objectives and questions relating to the research question. The scope and limitations of the study are considered and explained and the value of the study in terms of its importance, significance and originality is motivated.

A brief overview of the relevant methodology, research design and the research profile for this study are also provided.

1.1 BACKGROUND TO THE STUDY

A primary factor motivating an investigation into the development of middle managers in an ODL academic information service enterprise is that there may be additional development factors and strategies that impact on the success of these middle managers compared to middle managers operating in another environment.

It was observed that librarians responsible for specialised services in an ODL academic information service enterprise are sometimes promoted to take up a role in middle management but they often fail as they were never adequately developed and equipped to perform the role. Also, library and information researchers paid no attention to the conceptualisation and operationalisation of the construct “ODL Library middle

management development". Although the literature reflects much on preparing the "manager-academics" (Johnson 2002:33-51), literature searches pertaining to ODL manager-librarians or ODL manager-academic librarians within this field, conducted on national and international library databases, retrieved no significant information and no clear understanding of what influences ODL Library middle management career success. Library middle management development in an ODL environment should therefore be considered through a researched solution which acknowledges the context in which these managers operate.

The focus of this research aligns to some extent with a study conducted by the researcher in 2004 whereby ODL Library staff could be developed as leaders by performing secondary leadership roles (Raubenheimer, 2004). This previous study also has a strong focus on a development strategy, whereas the current study extends its focus to include an understanding of other aspects that impact on managerial success, in terms of competencies and skills and related development factors which influence career success while taking into consideration the ODL context.

During the past two decades various authors, including authors of books and journal articles on management development, alluded to the reasons why middle management needs development, what the focus of the development should be and how this development should be represented. The consequences of ignoring this matter were also pointed out in some instances.

1.1.1 The need for Library middle management development

The main reasons why all middle managers need to be developed pertain to the complexity of their role (Uyterhoeven 1989:1, McGurk 2009:465, Leahy 2003:14); the importance of their contribution to organisational goal achievement (Cronje, Du Toit, Motlala and Marais 2007:120) and the subsequent need for managerial capacity in service delivery (Moropa 2010:381); the need to cope in the work place, avoid stress and retain staff (Sutherland 2004:33); and to sustain the Library as a business through effective management in the environment in which it operates (Ouy Nguyen 2001:76); MacNeil 2004:98).

1.1.1.1 The complexity of the role of middle manager

The complexity of the role of middle managers in the library's structure is ascribed to the three hats they wear - a subordinate to higher authority, an equal amongst peers and a superior to the team they manage (Uyterhoeven 1989:1). McGurk (2009:465) alludes to management also having to manage outward as partners of global organisations. O'Toole, Meier and Nicholson-Crotty (2005:46) state that managerial networking outward can be an important contributor to the achievement objectives (2005). Leahy (2003:14) reports on studies conducted on Library middle management development which concluded that strong management expertise is required for managers to perform these different roles and to act as both an exceptional manager and an exceptional librarian.

1.1.1.2 Middle management capacity building and retention

The demanding role of Library middle management leads to the importance of management capacity building. It is explained that a lack of capacity causes a business to fail because organisational goals cannot be achieved (Cronje, Du Toit, Motlatla, Marais 2007:120). The lack of capacity pertains mostly to:

- Managerial incompetence. This is an inability to manage the business, regardless of previous library school courses (Leahy 2003: 5-12).
- Lack of leadership and an inability to think strategically.
- Lack of managerial experience in managing employees and other resources.
- No industry experience in Library services and products.

These factors point to a need for management capacity in the ODL Library, not only to address the possibility of business failure, but also from the perspective that:

- The human resource asset is one of the core components of any organisation and middle management capacity should be built to add value to the organisation (Cheese 2006:1).
- Managerial capacity should be built to lead and manage higher education institutions and eliminate the perception that there is a leadership crisis (Moore 2006:2). Wood (2007:3) expresses concern that higher education libraries in Africa are in transition and increasingly under threat due to the immediacy and convenience offered by the web. Moropa (2010:381) states that one way to reverse this is to focus on middle management training to ensure relevancy to the contemporary user.
- Managerial capacity building leads to staff retention as managers are able to cope

in the workplace when managerial stress is avoided. Should a manager not be able to cope, this may impact negatively on the retention of the managers as well as the staff being managed. A staff capacity building strategy linked to a retention strategy is needed to minimise the effects of turnover (Floyd and Wooldridge, 2000; Sutherland, 2004). Moore (2006:2) supports this view by stating that higher education institutions should equip their staff to cope as they cannot afford to lose their human capacity.

1.1.1.3 Sustainability of the library

The development of managers to sustain the Library has become crucial in an increasingly competitive business environment. ODL Library middle managers should be able to monitor changes in both the internal and external business environments and MacNeil (2004:98) emphasises that the middle manager's role may change due to increasing competitiveness. The management of environmental change as one specific contribution to be made by managers is also accentuated by Hellriegel, Jackson, Slocum, Staude, Amos, Klopper, Louw and Oosthuizen (2012:12).

Typical contemporary environmental changes to be managed which impact on service delivery include shrinking budgets, growing costs, use of expensive electronic resources, productivity, globalisation and the management of knowledge (Cronje et al. 2007:573). Davenport (2001:67) says that the knowledge economy sets a higher premium on the ability to learn continuously, take risks and work in teams. In particular, the transferring of knowledge to individual members of the team needs to be managed by middle managers.

Ouy Nguyen (2001:73) states that the implementation of all these changes demands strong managerial leadership. Middle managers are best suited to be developed for this purpose because they operate in a unique organisational position close to daily operations, customers and frontline employees, which enables them to understand where the problems reside. However, they are far enough divided from the front-line work which enables them to see the holistic picture and to allow new options to be considered for problem solving and business growth. There is also much diversity amongst middle managers, such as work experience, geography, gender, home language and age. This results in more diverse insights and contributions and middle managers are therefore in a position to communicate best with stakeholders affected by change (Ouy Nguyen 2001:74). The sustainability of the organisation through successful organisational change

requires middle managers to ensure high levels of employee morale and a balance between change and continuity (Ouy Nguyen 2001:76).

1.1.1.4 The need for ODL middle management development programmes

In order to ensure that staff development takes place, it is sometimes enforced through significant goal setting such as the development goals of a specific country and the goals of the type of business in which the staff operates. In South Africa, for example, the government promulgated three important acts in support of the improvement of the low skills base of the people in the country. These are the Skills Development Act, the Skills Development Levies Act and the South African Qualifications Authority Act which form part of the national skills development strategy (Cronje et al. 2007:248). McGurk (2009:1), however, states there must be a link to the needs of the work environment and the learning strategy must be integral to the library's development strategy. For middle management development this should include a coping strategy and a retention strategy as explained by Uyterhoeven (1989:1), Leahy (2003:14) and Sutherland (2004:33). There is frequent mention of the need for training programmes for middle managers. Roythorne-Jacobs (2000:138) indicates that the lack of proper development of middle managers is noted in research results as a source of managerial stress. Howze (2003:18) supports this view saying that the shortage of leaders must be responded to through an appropriate training programme or road map to show the path to managerial success.

Development strategies, including relevant competencies and development factors which facilitate the career success of ODL Library middle management, therefore need investigation to serve as a background to the empirical research of this study. The literature study should focus on theoretical perspectives about contemporary library middle management in an ODL Library environment and the practicing thereof. It should consider theory that leads to practice flowing from the different schools of management thought, organisational theory and management developmental models that align with this study. This will ensure that it can establish what development strategies and factors facilitate the optimisation of the career path of a middle manager in the ODL Library environment best.

Against this background information, the research focus of this study is to acquire an understanding of influences on career paths that contribute to the appointment of ODL Library middle managers so that these can be taken into consideration when developing ODL Library middle managers. Knowledge in this regard will contribute positively to

innovation in this field of study.

This innovative study is timely as the number of ODL institutions are growing. The target population to benefit from this study is ODL Library practitioners. There are ODL libraries in all continents of the world, such as the library at the Open University, Hong Kong; the Open University, Milton Keynes, United Kingdom.; Athabasca Open University, Canada; Indira Gandhi National Open University, India; Open University Malaysia, Asia; Open Distance Learning University in South Africa known as the University of South Africa; National Open University, Nigeria, to mention but the leading ODL libraries. Igwe (2011:1) states that these types of institutions have been growing significantly during the past decades.

1.2 STATEMENT OF THE PROBLEM

Being able to manage on the middle level of the academic environment has become a managerial competency. Since there is no clear understanding of factors that facilitate the appointment of librarians to the position of Library middle management operating in an ODL academic environment, or an understanding of how the development can be facilitated after the appointment of a Library middle manager, this knowledge should be gained for future consideration of Library middle management development. Currently the development is often done in accordance with the line manager's approach to middle manager development. The proposed research problem is motivated by the need for middle management development in a structured way (Roythorne-Jacobs 2000:138; Howze 2003:18). Against this background, the problem to be investigated can be stated as follows:

What is required to facilitate an optimal career path for ODL Library middle managers?

1.2.1 Research purpose

The three common research purposes are exploration, description and explanation (Babbie 2005:88; Babbie and Mouton 2011:79). The research purpose for this study is formulated in accordance with a typical purpose statement provided by Creswell (2003:96). In terms of this guideline, the purpose of this study is to investigate the development of Library middle managers working in an ODL environment and to explain critical influences that facilitate an optimised career path. The phenomenon is "development" and the phenomenon is defined as "critical influences" in "career path

success”; the context is the ODL Library; and the participants are the middle managers working in the ODL Library. The intent is to identify prior studies that relate to the topic of Library middle management development with a view to selecting concepts pertaining to manager development that explains the research questions in the study. This study will yield new insights through the research responses of middle managers with practical ODL Library experience relating to the research problem. With regard to the time dimension, based on the explanation provided by Babbie (2005:104), this is a cross sectional study with findings representing a single point of time. The study seeks to take one shot of a unique situation, namely the development of middle managers in the ODL Library, and to draw concepts from the collected data rather than from abstract theory. This investigation will ultimately accomplish an understanding of the importance of selected strategies and factors to be considered when developing, for example, newly appointed Library middle management in an ODL institution. The findings will contribute to the general body of scientific knowledge.

1.2.2 Research objectives

Babbie and Mouton (2011:103) state that the research objective refers to what needs to be studied and what the unit of analysis would be. The main objective of this research study is to build on the existing phenomenon of human resource development by exploring and describing a new interest, namely the phenomenon of ODL Library middle management development. The study was designed to investigate selected management competencies, career development strategies and development factors which contribute towards a successful career path for ODL Library middle management, in order to be considered as part of the personal development plans (Unisa Library, 2015c) of newly appointed middle managers, whilst taking into consideration how managers perceive career success.

The objectives are as follows:

1. To determine criteria which individuals use to describe career success.
2. To determine essential individual development factors that contribute to career growth.
3. To determine career development strategies relative to career growth.
4. To determine competencies relevant to the successful performance of the role of contemporary management.
5. To make recommendations on implementing development factors and strategies, including competencies that enhance the development practice of an ODL Library.

In terms of the unit of analysis to be explained, there are four social science main units of analysis: individuals, groups, organisations and social artefacts (Babbie and Mouton 2011:85). In this research, the unit of analysis would refer to the facilitation of the optical career path which is the actual unit being analysed. The individual members of the middle management staff category of a large size ODL Library form the unit of observation amongst whom the unit of analysis will be investigated. The middle management staff category is defined in terms of the middle management definitions in the literature which apply to this study. The members of this staff category are permanent full-time staff employed as directors and managers of teams. Within this level, staff categories can be further sub-categorised as directors, deputy directors, managers and supervisors (first-line managers) that collectively represent middle management; and managers responsible for managing professional Library staff versus managers responsible for managing administrative Library staff. Although the total number of staff members who form the population is relatively low since it comprises only 38 members, these staff members represent 100% of the middle managers operating in the only ODL Library in South Africa. In reality, these staff members therefore represent 100% of the ODL Library middle managers in South Africa.

1.2.3 Research questions

In order to find answers to the core problem, the first three sub-problems pertain to what has been reported in the literature on the role of managers and the required competencies; career development strategies that facilitate middle management success; and development factors that influence career growth. The following three questions pertain to how the respective competencies, development strategies and internal and external factors are rated in terms of their value and importance and therefore need to be investigated through empirical research. The findings of this research will lead to the value of the study to the theory of human resources development.

Research question 1. What theory and practice relate to the role of ODL Library middle management?

1.1 What are the role and related tasks of management?

1.2 What management theories underpin management success?

1.3 What management competencies and skills, based on reported management theories,

relate to Library middle management career success?

1.4 How does the ODL academic information service enterprise differ from the academic residential Library environment.

These questions cover one component of the research question and will be addressed by a literature study of the existing body of knowledge. The answer will provide insight into the theories that underpin management development.

Research question 2. What is the role of the Human Resource function in Library middle management development and career success?

2.1 Who is responsible for middle management career growth?

2.2 What do training, development and learning entail?

2.3 What is the difference between technical and management training?

2.4 How does staff perceive career success?

2.5 What selected developmental strategies facilitate Library middle management development success?

These questions cover another component of the research question to be addressed by a literature study of the existing body of knowledge. The answer will provide insight into development aspects pertaining to Library middle management.

Research question 3. What selected development factors relate to the successful career growth of Library middle management?

3.1 What are the role and value of selected development factors in Library middle management career growth?

3.2 How do internal factors differ from external development factors?

3.3 What internal and external factors, which contribute to Library middle management development success, can be applied to a study of ODL Library middle management?

These questions cover the last component of the research questions to be addressed by a literature study of the existing body of knowledge. The answer will provide insight into development factors that influence career success. In addition to answers to sub-questions 1 and 2, this question will inform the research design for the empirical component.

Empirical Research question 4. What influences the successful career path of Library middle managers in an ODL institution?

In order to answer this overarching empirical research question, research questions 1-3 will be operationalised. This leads to an understanding of influences on ODL Library middle management career success. The empirical research question has its own sub-questions.

4.1 How do ODL Library middle managers perceive career success?

4.1.1 How do ODL Library middle managers perceive their own success measures against selected success criteria?

These questions are required to determine the views of the respondents on the importance of career success, since the literature indicates that people have different views on the meaning of success and often use criteria to motivate the reasons for being successful. This construct is very specific in terms of the criterion which categorises the person's perception of career success best; and the use of the criterion which reflects meeting the own success.

4.2 How do ODL Library middle managers perceive selected development factors?

4.2.1 How important were external factors in facilitating the successful appointment of ODL Library middle managers?

4.2.2 How important were internal factors in facilitating the successful career path of ODL Library middle managers?

These questions pertain to external factors over which the participant had no or little control, which may facilitate the appointment; and internal factors (innate or developed) which influenced the successful career path of ODL Library middle managers after appointment to the middle manager position.

4.3 How do ODL Library middle managers perceive selected development strategies?

4.3.1 How important were development strategies in facilitating the successful appointment of ODL Library middle managers?

4.3.2 How important were selected development strategies in optimising the ODL Library middle management career path?

4.3.3 How does the own performance of ODL Library middle managers measure up against their perceptions of the importance of development strategies?

These questions pertain to the perceived development strategies that facilitated success on the person's career path, namely to be appointed to perform the role of an ODL Library middle manager and to perform the role thereafter. Questions within the relevant construct pertain to career development strategies which the participant applied to facilitate the successful appointment; and career development strategies that facilitated the person's career success thereafter when managers take responsibility for their own development or when they collaborate with their line manager to draw up a Personal Development Plan (PDP) (Unisa Library,2015c); as well as the success perceived by the participant when the person applies the knowledge gained through these development strategies.

4.4 How important were selected competencies in facilitating the successful career path of ODL Library middle managers?

4.4.1 What are the attitudes of ODL Library middle managers towards their own use of identified competencies that lead to career success?

This question pertains to the perceived importance of selective competencies indicated in the literature as competencies that lead to managerial success; as well as the perceived success achieved by ODL Library middle managers when using these competencies.

The answers to the questions address the value and contribution of the study and will feature in the recommendations.

The questions 4.1 - 4.4 and related sub-questions will be answered through empirical work, namely quantitative survey questions which include open-ended and closed-ended questions (Appendix 5); as well as interviews guided by questions in an Interview protocol (Appendix 11); and institutional documents which provide qualitative data.

1.3 KEY CONCEPTS

The following core concepts relevant to the title of this study are defined to ensure that they are understood in the context of the study.

Development

Development refers to a set of systematic and planned activities designed by an organisation to provide an opportunity to learn new skills to meet current and future job demands (Cronje et al. 2007:207).

Development is considered to be the overall concept and includes both the training and the development concept, and learning is at the core of all human resources development activities (Cronje et al. 2007:207; Du Toit, Erasmus and Strydom 2012:304-306).

Middle management

Jobs in middle management vary widely in terms of responsibility. Depending on the size of the company and the number of middle level managers in the firm, middle managers may supervise only a small group of employees, or they may manage very large groups, such as an entire business location (Reference for business 2015:1).

Middle managers can also be those in the levels below top managers, responsible for carrying out the goals set by top management, and who manage at least one subordinate level of manager, and report to a higher level of manager in the organisation (Reference for business 2015:1).

Open Distance Learning

Open distance learning is a multi-dimensional system aimed at bridging the time, geographical and transactional distance between student and institution, student and lecturer, student and courseware and student and peers (University of South Africa 2008:1).

1.4 IMPORTANCE OF THE STUDY

In accordance with research study protocols the justification or rationale for the study pertains to the importance of the subject area, indicates why the study is necessary in terms of what was done before and how the study will be used. It also needs to point out the gap to be filled in the literature (Babbie and Mouton 2011:103). The intent of this study is to determine development factors and strategies which facilitate the optimisation of the

career paths of ODL Library management. Babbie and Mouton (2011:79) state that social research is often conducted to provide a basic familiarity with a topic. In the case of this study, it considers aspects that facilitate the successful career paths of managers to be investigated in the ODL Library middle management environment. This study thus includes previously conducted research with some adaptations, to be examined in the ODL environment. The recommendations flowing from similar previous studies indicated primarily that more formal training in the techniques of management is required (McClure:1980:2389); required skills for staff in academic or research libraries (Marcum:1983:1-20); management preparation, training and development of middle management in academic libraries prior to appointment to a middle management position (Rooney 2010:383-393). The studies, however, did not acknowledge development strategies and factors which optimise the ODL Library middle managers successful career path. A study of middle management development in ODL libraries will be valuable as it

- explains the difference between library middle management and other management; and the difference between middle management in a residential and ODL environment respectively
- explains how ODL Library middle managers perceive success
- explains required competencies of middle managers in an ODL environment to be developed
- explains development strategies for the best career pathway of ODL Library middle management
- explains the attitudes of ODL Library middle managers towards internal and external development factors which typically impact on the career path success of middle managers.

This will result in useful knowledge since the ODL institution is an enduring practise which has grown significantly in Africa from 1988 (Igwe 2011:1).

1.4.1 Originality of the study

As part of a research study on different interpretations of originality in the context of doctoral research, Guetzkow, Lamont and Mallard (2004:197) identified criteria which were used to motivate the originality of the research study in the respective sciences. These criteria refer to an original approach, understudied area, original topic, original method, original data and original results. Phillips and Pugh (2010:60) support these criteria by

accentuating the fact that originality refers to a contribution that uses a methodology on a new topic where it has not been applied before. These criteria apply to this research study as it will address a topic in a context not researched before. Although studies have been conducted on Library middle management development, a study of this nature, investigating competency, relevance and frequent use in addition to various developmental strategies and factors that influence career development in an ODL environment, has not been conducted before. Also, the approach of the study whereby the ODL Library is acknowledged as a business enterprise, its research methodologies and the approach to data analysis are original. The proposed study is therefore likely to meet the criteria on originality noted above.

1.4.2 Significance of the study

The significance of a study refers to the rationale for conducting the study, why the results will be important to scholarly research and literature in the field, and how it may improve practice or policy (Creswell 2003:149). In considering the current Library middle management situation, it is evident that what influences the development of Library middle management success in accordance with the demands of the enterprise in which the manager operates, needs to be investigated (Uyterhoeven 1989:1; MacNeil 2004:98; American College and Research Libraries 2010:286). The identification of development factors and strategies and the relevance thereof to the ODL academic environment contribute positively to the knowledge of a growing target population, known as ODL Library practitioners. The following benefits are envisaged:

- Improved staff development
- Line management responsible for the development of middle management will ultimately be able to evaluate their talent management practice in terms of development factors and strategies which facilitate staff development.
- Improved staff satisfaction and retention since staff feel equipped to make progress on the career pathway
- Employer of choice

An employer who fosters an understanding of matters required to facilitate career path growth will be acknowledged as an employer of choice. People may choose to work in an organisation that rates staff development as important, regardless of other alternatives that can be considered, such as working for another organisation, starting an own business or taking early retirement (Bavendam Research Institute 2011:1).

1.4.3 Assumptions

The assumptions in this study are about the academic environment used as a target population, the individual participants and the research design.

Firstly, it assumes that the participants (Library middle management employees working in an ODL Library) have a basic understanding of their roles and responsibilities in the enterprise, the middle management function and staff development practices that contribute to Library middle management development. The second assumption is that participants will fully engage in the questionnaire and interviews knowing that the confidentiality of the details will be respected. The third assumption is made that the participants will be able to relate to examples of middle management development in the context of this study and participate willingly in collecting the data. The fourth assumption is that the sample will represent a prototype ODL Library.

Lastly, the assumption was made that career concepts have been identified in previous independent research. The design and format of the closed-ended questionnaire in this study was therefore based on the evaluation of factors, competencies and strategies (and their sub-components/ or elements) that had previously been identified in independent research as effects that impact career success. The purpose of the current research was to assess how middle managers in an ODL Library environment perceive these previously identified constructs to impact their career advancement in their specific (ODL) environment. The format of the questionnaire was such that these previously established constructs (factors, competencies, strategies and their sub-elements) were to be rated for their perceived importance/ and perceived personal attainment of success. This implies that the study started off with given constructs and therefore did not lend itself to techniques that investigated whether these constructs do exist (this would require exploratory factor analysis which is therefore not considered in this research) – since this had been done in independent research this study assumed that the mentioned concepts exist. With this assumption made, the format of the questions, evaluated on a five point Rikert scale (*critically important* to *irrelevant* ratings and *not successful* to *very successful*) probed perceived-importance or personal success of previously identified career-success concepts.

1.5 RESEARCH METHODOLOGY AND DESIGN

The research methodology maps out the approach which will solve the research problem. The research design is a plan (blueprint) which indicates the type of study to be conducted to resolve the research problem (Babbie and Mouton 2011:74,103).

1.5.1 Research methodology

The research methodology refers to the study's research approach. Creswell (2014:20) states that certain types of research problems call for specific research. Research problems addressed in this study pertain to a call for identification of development factors that influence an outcome; the utility of an intervention or understanding the best predictors of outcomes. In this study the intention was to gain evidence pertaining to perceived importance and use of identified development factors and strategies which influence ODL Library manager career success. The context of the study is the ODL Library environment and the investigation involves the career paths of one specific group of people, namely the ODL Library middle managers, at one institution from whom data are collected.

The study relates to a postpositivist worldview or assumption, which is often referred to as empirical science (Creswell (2014:7). The problems studied by postpositivists reflect the need to identify and assess the causes that influence outcomes. Key assumptions that apply to this postpositivist position, as stated by Creswell (2014:8), are that that the research seeks to develop relevant statements that serve to explain the situation of concern; and that researchers must examine methods and conclusions for bias, meaning that the standard of validity and reliability are important in research.

1.5.2 Research design

The research design leads to the production of data needed to answer the research questions which are divided into stages because the broad research design follows a logical sequence regarding questions raised, in order to learn more about the research topic and related research problem (Grix: 2010:68). Yin (2009:9) and Creswell (2014:11-14) allude to the fact that the researcher does not only select a qualitative, quantitative or mixed method research approach but also decides on the type of research method within the three choices to collect and analyse empirical evidence. The research methods to be considered are the experiment, survey, archival analysis, history and case study. Any of

these research methods can be used for all three research purposes, namely exploratory, descriptive and explanatory research. However, the decision as to when to use each method is influenced by three conditions. The conditions pertain to the type of question to be asked, whether control of behavioural events is required and whether it focuses on contemporary events. In accordance with these conditions, the relevant research method in this study is the case study.

Rowley (2002:17) explains that the case study method is good for contemporary events when the behaviour cannot be manipulated. Yin (2009:3) explains the path of a case study by stating that the path should start with the literature review and posing research questions and objectives, followed by explicit procedures central to the respective research methods. Rowley (2002:18-19) provides more specific details when stating that the research design of a case study involves defining the basic components of the investigation such as the research questions; the study's unit of analysis; the linking of data to the research questions; and criteria for interpreting the findings, including validity and reliability. In order to ensure that the case is studied systematically, a case study protocol was developed which included procedures and rules to use the data collection instruments. Such a protocol is very important according to Rowley (2002:21) and Yin (2009:79) who point out that it has one thing in common with a survey questionnaire and that is that both are directed at a single data point, namely a single case or single respondent. This study has a single case study design, since only one group of ODL Library middle managers was involved.

The case study protocol has different sections such as the specified topic, access rights to sources of information, questions to be kept in mind during data collection and a format for the narrative. The procedures to collect data from the survey questionnaire involve closed and open-ended questions and the procedures to collect data followed during interviews are in accordance with an interview protocol, which includes structured questions with open-ended interviewing, as well as data collected from institutional documents.

The research methodology and design for this study can thus be motivated as follows:

This is a positivist case study which triangulates data collection methods. This approach to research arose from the need to distinguish between types of mixed methods studies highlighted by scholars such as Tashakkori and Teddlie (1998) and Tashakkori and Creswell (2007). The intention in this study is to collect quantitative data and qualitative data but to keep the data separate with no intention to mix the data as is the case in a

mixed method methodology. Mixed methods as a collection technique of two types of data is closely focused on methods rather than mixed methods as a methodology. In accordance with the purpose of the study and its related research question the intention is to triangulate research methods. Both quantitative and qualitative data would be collected by means of a survey, interviews and the analysis of institutional documents but the data will be kept apart.

1.5.3 Sample frame

As part of the research plan, aspects of the population and sample need to be described (Creswell 2014:158). Since the number of the ODL Library middle managers was small, namely 38 persons, the entire population was included in the survey questionnaire to ensure maximum input from all available ODL Library middle managers in one country. The researcher had access to a list with the names of the population. A single stage procedure to identify the participants was thus possible.

For the collection of qualitative data through interviews, purposive sampling was applied but the entire population was not included. One middle manager with more than five years' experience per management layer (director, deputy director, manager, and supervisor) was selected by the researcher who felt convinced that the right information could be collected through interviews with these persons as they had extensive experience.

1.5.4 Data collection methods

The design included triangulation of data collection methods involving different data sources. The study takes a positivist approach to case study design, which requires a definition of questions in advance of data collection. The literature study was done as a first step to identify how managers perceive career success and what factors and strategies influence the successful career path of managers. Recent textbooks and articles in accredited journals, written by doctors and professors, in the field of study were used to construct the quantitative questionnaire which would lead to the operationalisation of the study.

This fostered an understanding of factors and strategies which influence the career path before and after appointment to a middle management position. This step led to a questionnaire (Appendix 5) and an interview protocol (Appendix 11) as tools to gather the data. These tools were developed in terms of the study's research questions. The

interview protocol included reference to responses received through the questionnaire and included institutional documents to gain further knowledge. The study followed an explanatory sequential method to collect the data. The intention was to discover through a survey questionnaire what development factors and strategies are perceived as important facilitators in ODL Library middle manager growth and to then conduct interviews to gain clarity on certain responses to questions in the survey questionnaire and to also determine how and why ODL Library middle management uses selected factors and strategies to succeed. This generated knowledge and understanding of what impacts on the successful career path of ODL Library middle managers in order to develop them accordingly. Data was collected with the following three aims in mind which would lead to the findings of the study:

- The quantitative data collected through the questionnaire provided an understanding of the importance of factors and strategies perceived as a response to 'what' is important and to what extent it is used.
- The interviews were conducted to gain clarity on responses received in the quantitative questionnaire and to gain more qualitative information to enable the researcher to explain the impact of the role of the phenomenon on the ODL institution. Interviews with managers oriented the researcher to nuances of 'how and why' certain strategies are deployed and 'how and why' selective factors influenced a successful career path. Interviews with senior managers oriented the researcher to understand the role of ODL Library middle management, particularly with regard to the Library's strategic plan.
- Qualitative findings were further complimented through data gained from institutional documents pertaining to 'who, where and when' questions.

1.5.5 Data analysis and presentation

As part of the data analysis, the data was cleaned before presentation in tables and figures as advised by Ngulube (2005). For the quantitative part of the investigation, data was pre-coded and for the qualitative data coding was done after the data collection phase. Relationships between variables were studied to find a solution to the research problem.

The findings were analysed and then explained in terms of the aims for collecting data as described above. Creswell (2014:15) states that the relevant method to follow in the case

of explanatory research is to conduct quantitative research first. Creswell (2014:4) states that the quantitative research approach is for testing objective theories by examining relationships among variables, which can be measured so that numbered data can be analysed using statistical procedures. After the results are analysed the researcher build on the results to explain in more detail with qualitative research. It is then considered explanatory since the initial quantitative data is explained further. The design therefore encompassed a literature study followed by empirical research with a survey questionnaire which included both closed and open-ended questions and a case study which collected data from interviews and institutional documents. The findings of the survey questionnaire revealed the perceived importance and use of identified factors and strategies as facilitators for the successful career path of Library middle managers; whereas the findings of the interviews revealed how and why these factors and strategies should be applied; and institutional documents revealed additional answers to ' who, when and where' questions. Data collected from the respective data sources through triangulation for assessing the phenomenon represent reality.

Creswell (2014:8) indicates that researchers need to examine methods and conclusions for bias since the standards of validity and reliability are important in quantitative research. Creswell (2014: 201) states that triangulation is one of eight validity strategies that are most often used. The researcher triangulates different sources of information by examining evidence from the sources and then uses it to justify the themes. In this study, the themes were established based on several sources of data, namely the documents identified in the literature and at the relevant institution and from perspectives of participants. Creswell (2014:201) states that validity strategies should be incorporated to check the accuracy of the findings. In this study, the validity scores of the instrument were considered to establish the validity of the quantitative findings, namely whether meaningful and useful inferences from scores on the instrument could be made. In this regard the content validity, predictive (concurrent) validity and construct validity were considered. Reliability was considered in terms of the use of the instrument in the past and related scores resulting from this use as well as reports in this regard of internal consistency (consistent responses across constructs) and test-retest correlations.

Creswell (2014:201) states that qualitative validity means that the researcher checks for the accuracy of the findings by employing certain procedures. Validity in qualitative research pertained to trustworthiness, authenticity and credibility. In this study, it was considered whether findings were accurate from the standpoint of the researcher,

participant and reader. Other validity strategies which were incorporated to establish the validity of the research further are member checking to determine the accuracy of the qualitative findings. In this regard the findings were taken back to the participants to check the correctness thereof. Other validity strategies included:

- An analysis that reflected a thorough description of the findings which can be seen as realistic.
- Bias that the researcher brings to the study had to be clarified. Such a self-reflection creates an honest narrative with readers.
- Details about site and participants were conveyed based on the researcher's time spent in the field.
- Peer debriefing was done to enhance the accuracy of the account.
- A person who reviews and asks questions about the qualitative study was located so that the account will resonate with people other than the researcher since this interpretation beyond the researcher adds validity to the account.

Qualitative reliability indicated consistency in the researcher's approach to the research, for example, that the same questions were posed to different participants. In this regard, Yin (2009) suggests that the procedures followed should be documented as part of the case study and the steps of procedures as part of a detailed case study protocol must be set up. This is available in Appendix 11. Yin (2009:79) pointed out that the case study protocol is an important way of increasing reliability in case study research. Other qualitative reliability procedures include checking the transcripts for mistakes, ensuring that there is no drift in definition of codes and cross checking of codes by comparing results that are independently derived. It was important that another person cross checks by means of an inter-coder agreement. It was also determined whether participants agree to the accuracy of recordings.

1.6 ETHICAL CONSIDERATIONS

Ethical standards are emphasised in LIS research, particularly with regard to maintaining the confidentiality of participants. In accordance with the Unisa Policy on Research Ethics (2014) where the population of this study resides, researchers may not undertake secret and classified research. The researcher therefore had to apply for approval of this research as part of the university's procedure to have the relevant research proposal approved. Appendices 1, 2 and 7 contain the details of the ethical clearance received by

the researcher to conduct this research. This includes permission to involve Unisa staff and data in accordance with the Unisa policy entitled *Policy for conducting research involving Unisa staff, students or data* (University of South Africa. Department of Research 2013:1). The Committee that granted permission is chaired by the Vice Principal: Research and Innovation and is responsible for all recommendations to be sent to the Department: Legal Services for approval. The policy is clear on the responsibility of the researcher, namely that the person should adhere to the Unisa *Policy on Research Ethics* in order to protect the rights of Unisa staff and students. The policy is also clear on the fact that Unisa has a right to know what will become of information obtained from Unisa staff and/or students, and its intended use and application; Unisa is responsible for controlling information obtained from its staff and/or students as prescribed by existing national laws and university policies and regulations; any research output resulting from the research must be shared with the Executive Director: Research prior to publication and a copy of the final result of the project must be submitted to the Executive Director: Research within 12 months of completing the project. This policy specifies to the researcher how research should be conducted from an ethical point of view and provides guidelines to researchers in terms of accountability, responsibility and respect for human participants. The researcher adhered to this policy by ensuring that participants were informed about the aim of the research and were assured that the research would be conducted in a confidential manner.

The study was subject to informed consent obtained from the participants (Appendix 5 for participation in the survey; Appendix 8 for participation in the interview; Appendix 9 for permission to record the interviews). Each consent form included a section at the beginning which explained that it was the intention to carry out the research according to good research practice and in an ethical manner. A consent form was completed by the participants on the questionnaire before the questionnaire was completed and before interviews were scheduled. In both cases the procedure to be followed by the researcher was described, particularly with regard to how the confidentiality of all data collected from and about research participants would be obtained, as well as the security procedures which were implemented for the protection of privacy. The researcher undertook to notify the relevant ethical committee in writing immediately if any adverse event occurred.

Other ethical considerations pertain to the researcher being competent and accountable, respectful towards human participants and able to conduct the research responsibly. The researcher has published before and has experience in conducting research. In this study,

the researcher pointed out the rights of the population by notifying the population of the aims and benefits of the research, their right to abstain from participation in the research and to terminate at any time should they so wish, as well as the way in which confidentiality would be ensured. This was done verbally by the researcher as part of the announcement of the research study to take place and in writing as part of informed consent. The fact that informed consent was obtained before participants completed the questionnaire and before interviews were conducted, reflects an ethical design according to Carlin (2003:3), a term used when the researcher focuses on matters to be shared with the population. In order to ensure that personal information is protected, the researcher ensured adherence to the stipulations of the POPI Act (South Africa. Protection of Personal Information Act, 2013).

The study was also discussed with authors of publications used in this study as part of the empirical research to inform them that identified content would be investigated in the context of an ODL Library. These persons advised on the use of the content within the research instrument and provided permission to use it.

In summary, in South Africa, library researchers are reminded by the relevant national library association (LIASA) that any form of misconduct in research should be avoided (Library and Information Association of South Africa, 2015). Finn (2005:86) further explains that this includes deliberate attempts to be dishonest such as the falsification of data, plagiarism (the use of another person's words as though they are yours without acknowledging the relevant author), as well as the mismanagement of research funds for personal gain. The researcher viewed these factors in a serious light and was mindful of the importance of conducting the research in a conscientious and ethical manner.

1.7 SCOPE AND LIMITATIONS

Creswell (2003:147) states that scope and limitations establish the boundaries of the study and are found in qualitative, quantitative and mixed method studies. The scope or delimitation of a research study indicates how the researcher plans to narrow the study. The scope of this study pertains to its context as indicated in the research topic, constructs (relating to competencies, specific factors and development strategies) derived from the most appropriate theoretical management perspectives and studies of a similar nature to be investigated in this study.

The limitations of a study, however, can be viewed as a potential weakness in the design

of the study (Creswell 2003:148). The limitations of this study pertain to the study primarily focusing on an overall understanding of Library middle management development which includes a focus on one ODL Library environment. It was anticipated that a representative sample from one ODL institution and the relevant middle management/supervisors responsible for teams would provide sufficient representation of all the demographic variables (age, experience gained from all previous jobs, seniority, functions within the ODL Library's respective business units and language groups) that need to be considered in the research.

The margin of error or confidence level determined the extent to which the results confirm or dispute the assertion that ODL Library middle managers can be developed in terms of certain factors and strategies. This was reflected in the precision of the survey data. It revealed that certain factors and strategies were more important than others and were confirmed by findings in other data sources used.

1.8 OUTLINE OF THE THESIS CHAPTERS

The thesis is organised into six chapters which focus on the following:

Chapter One: Introduction to the study

The purpose of Chapter One is to provide the general introduction to the study by explaining the research field, research title and the research problem, and to report on the most important research findings that motivate the research question. Concepts relevant to the proposed research are clarified. The chapter also provides brief information on the suggested methodology for the research.

Chapter Two: ODL Library middle management career development

This chapter reports on a literature review pertaining to related theories that impact on middle manager success, as well as development factors and strategies that facilitate an optimised career path for middle managers. It further investigates conceptual models and contextual models that can direct the career development of Library middle management, based on the effect of the ODL environment on Library middle management. This includes a discussion on criteria to determine career success.

Chapter Three: Research methodology and design for the empirical study

This chapter describes the research design and methodology followed in the study. This includes a detailed explanation of the population, the questionnaire, interviewing method and methods of data collection and analysis.

Chapter Four: Presentation of results and findings

This chapter provides a presentation of the quantitative and qualitative data.

Chapter Five: Analysis and interpretation of data

This chapter further presents the findings and provides a statistical analysis of the validity and reliability of data indicating importance and use of development factors and strategies, correlations between variables, interpretations of the data collected and a synthesis of the findings within the empirical investigation.

Chapter Six: Summary, conclusions and recommendations

The last chapter concludes the study and furnishes a summary of the main research findings, recommendations and suggestions for future research.

1.9 REFERENCING STYLE USED IN THE THESIS

Information found in the literature review is acknowledged under the heading *References* to indicate the source of the information. The Harvard style of referencing is applied since this is the preferred style of the Unisa Department of Information Science. It uses the author and date instead of a numerical system (Kimber 2001:329).

In cases where a source of information was cited as authoritative, the exact words were quoted and citations were manually typed into the thesis.

1.10 CHAPTER SUMMARY

This chapter presents an orientation to the problem under investigation and outlines the background and review of the literature in order to contextualise the problem. The chapter introduces the study and provides background information and the motivation for the study as well as the research problem. Key concepts in the study are operationalised and research objectives are specified. The value of the research and its delimitations are explained. Lastly, a brief description is provided of the research design and methodology and the data collection methods to explain how the research was done. The importance of upholding high ethical standards is accentuated.

It is apparent from the preliminary literature review that an understanding of the relevant concepts, theory and practice, which underlie middle management development, is important as it fosters an understanding of the needs of ODL Library middle managers. This, together with a theoretically based discussion of the ODL environment and its influence on the role and responsibilities of Library middle management, is therefore presented in Chapter Two.

CHAPTER TWO: ODL LIBRARY MIDDLE MANAGEMENT CAREER DEVELOPMENT

2.0 INTRODUCTION

Chapter One introduced the research problem that deals with the need for an understanding of what is required from a development point of view to facilitate an optimal career path for ODL Library middle managers. It suggested an investigation into competencies, factors and development strategies that create the best pathway for middle management working in the context of an ODL Library environment. The research design was developed in terms of this problem statement.

A research design has two distinct parts, namely the conceptualisation reflected in the theoretical framework, and operationalisation which takes the form of empirical research to investigate the problem statement. Chapter Two reflects the conceptualisation of this study in a framework derived from a review of the literature on theory and practice which underpin a successful career path for ODL Library middle managers. Chapter Two begins with background information pertaining to the role of the literature study, sources of information and the map of the research literature applicable to this study. This is followed by an examination of concepts indicated in the map including the theory and practice to which the study relates.

This literature study on the existing body of knowledge provided answers to questions that cover the middle management concept and components of the research question. These answers supported the conceptualisation and contextualisation of Library middle management development. Answers to the research questions flowing from this literature study will ultimately guide the research design for the empirical component presented in Chapter Three.

2.1 ROLE OF THE LITERATURE STUDY

This discussion on the role of the literature review is based on the views of methodologists in recent publications. It focuses on the purpose of the literature review and its connection with theory and practice as well as the creation of a framework, also known as the literature map, applicable to this study.

The purpose of the literature review is to examine research specific to the title of this study and the problem statement in an orderly manner. Leedy and Ormrod (2005:64) allude to the fact that the literature review provides background information on what others have done in areas similar to this study. Leedy and Ormrod (2005:64) state that it can therefore support the researcher's argument and summarises the ideas of others in terms of the research problem while providing an opportunity to identify gaps in the previous research. They further state that the literature review is also useful in terms of the choice of methodologies to be applied and the effectiveness of the results flowing from the research which could be repeated in this study. Dul and Hak (2008:48) state a literature review describes what is considered to be 'known' as accepted knowledge.

The role of the literature review cannot be considered separately from theory. Ngulube, Mathipa and Gumbo (2015:49) allude to the fact that theory is identified from the literature and that research in the social and management sciences is partly theory-oriented. Researchers gain knowledge about theories in their field through engaging with scholarship. They then develop knowledge of various theories used in a discipline and read exemplars of the theory being used. This is done by engaging with the literature in order to discover a theory that can frame their understanding of the concept under investigation in order to establish a solid theoretical grounding which guides the study. This echoes the view of Imenda (2014:186) as she states that research is guided by theory and suggests that research would lack direction without theory.

Imenda (2014:186) supports the definition of Liehr and Smith (1999:8) who define theory as

'a set of interrelated concepts, which structure a systematic view of phenomena for the purpose of explaining or predicting. A theory is a guide for modelling a structure. A blueprint depicts the elements of a structure and the relation of each element to the other just as a theory depicts the concepts, which compose it and the relations of concepts with each other'.

Imenda (2014:188) concludes that theory informs the research and that is the reason why in every research study a theoretical framework is presented. Ngulube, Mathipa and Gumbo (2015:132) also view a theoretical framework as an important contributor towards informing the enquiry. Imenda (2014:188) explains that the research framework can be seen as a structure that provides guidance. It is used to check whether the research

findings agree with the framework. In the case of discrepancies, a question is asked as to whether or not the framework can explain them. Against this background of theory and concepts, a distinction between a theoretical framework and conceptual framework is made. A theoretical framework is the application of theory to offer an explanation of the event or shed light on the research problem or phenomenon, whereas a conceptual framework applies when a research problem cannot be researched in terms of one theory to offer an explanation of the event (Imenda 2014:189). The researcher then synthesises the existing views in the literature, both theoretical and from empirical findings.

Since this study was not based on one pre-existing theory which pertains to studies with a theoretical framework, a conceptual framework was thus created by the researcher from a variety of conceptual perspectives derived from different studies of the literature. Ngulube et al. (2015:53) explain that social scientists sometimes combine theories to explain a set of data in order to achieve fidelity. This is known as theoretical triangulation. It is used to enhance the researcher's understanding of the phenomenon as the theories complement each other.

The literature review of this study was focused on determining relevant factors and strategies which facilitate management career path optimisation. This direction could be useful when considering a career development plan for middle managers. The reviewed literature points out that in terms of the study's research question, there are four major areas which relate to the facilitation of an optimal career path; and which subsequently guided the formulation of a framework for the review of pertinent research and related sources of information. These lead to the involvement of aspects that influence career success, including development factors; development career strategies; required competencies; as well as the manager's perceived view of success. This study of the literature not only included relevant related research studies to unpack these concepts, but also considered the context in which middle managers operate, namely the library environment, management environment and ODL environment respectively. This provided context for the middle managers. It was included to provide a sound theoretical basis as the study hopes to benefit this staff category in an ODL Library.

2.1.1 Sources of information

Sources of information pertaining to different theories were selected to determine the foundation of organisation and management and development factors and strategies that

impact on management career success. There are many sources of information available on management since management evolved over time. The focus of this study was on management thought in contemporary management. This is accentuated by various authors in selected books consulted on management theory and practice. These include particularly books by Dessler (1985); Holt (1987); Cronje et al. (2007); Cole and Kelly (2011); Du Toit et al. (2012); Hellriegel et al. (2004; 2010; 2012; 2013).

The respective editions by Hellriegel et al. (2004; 2010, 2012; 2013) provided guidance, particularly with regard to competencies that lead to managerial success. They were considered relevant since they focus on the South African management environment that could relate to the empirical research in this study which was conducted in an ODL Library in South Africa. In determining the content validity of selective competencies used in management related research conducted by Hellriegel et al. (2013), the editors were contacted to establish the findings of item statistics pertaining to the six most important competencies published in the book on management, in order to consider their credibility. The following response was received from one of the co-editors of the book:

“When we developed the instrument more than 15 years ago, we tested it on hundreds of Executive MBAs. The coefficient alphas were good, all exceeding .70 for internal reliability. We did not undertake any structural equation modelling, nor have we done that since the original design of the instrument. We undertook a factor analysis at that time and the loadings (>.70) were very clear” (Slocum 2015:1).

This management information was complimented by recent information in journal articles, published in accredited journals, which could provide information on the role of management and the management and leadership tasks required to perform the role of management in the postmodern management era. An article by Nienaber (2010) specifically guided the study in terms of the tasks to be performed by managers. This article was acknowledged worldwide since the author received the Emerald Literati Network 2011 Outstanding Paper Award. The same author was also awarded with the Unisa Excellence in Tuition Award by the University of South Africa in 2010. Since this author is employed at the same institution as the research population, the research was considered as relevant to the ODL environment and applicable to this study. The additional information assisted the researcher in the design of quantitative questions which could provide answers relating to required skills within the competencies suggested by Hellriegel et al. (2013).

The source of information which fostered an understanding of factors and developing strategies that impact on career success best, is the research study conducted by Golden (2006). The study of Golden (2006) was considered credible as it was conducted with input from known library practitioners who have consulted leading consultants in the Library leadership and management fields to identify factors that influence middle management career path success, and who have tested these factors in a library environment where middle managers formed the population of the research study. The findings of primary and secondary studies modelled and extended by Farmer and Campbell (1998) and Greiner (1985) were scrutinised with a view to adopt these factors and strategies for the purposes of both the study of Golden (2006) and this study.

In addition to the two primary studies on which Golden (2006) based her research, she also considered factors and strategies derived from six secondary studies applicable to the research on career development directions for public library middle management development. These studies have provided a model for the extended set of career path development strategies used by Golden (2006:180). Useful factors and strategies derived from the studies of Ferriero (1982), McNeer (1988), Harris and Tague (1989), Chatman (1992), Haycock and McCallum (1997), and Pergander (2003) were included in the study by Golden (2006) as the characteristics of these studies are relevant for successful library career paths. Concepts pertaining to strategies and factors, selected by Golden (2006), were analysed with a view to adopt them for further research in this study on selected factors and strategies that optimise the career path of ODL middle management. Additional factors and strategies relevant to the ODL environment in South Africa were then added to these factors and strategies.

In order to foster an understanding of the ODL Library as opposed to the residential library, primary information resources of a leading ODL institution in Africa were studied to gain an understanding of the institution's identity and the organisational plans and relevant policies in support of the plans. This was done in addition to articles on the ODL institution and related institutions, which were published in books, accredited journals and theses on the topic of ODL. The study on middle management development in an ODL Library environment was subsequently guided not only by the factors and development strategies identified by Golden (2006). Other factors and strategies relevant to the ODL Library environment were added.

Lastly, since this study pertains to facilitators of career success, the meaning of success needed to be considered as part of the study. Studies which were conducted on personal conceptions of motivation and career success, held by managers, were therefore considered in terms of what it means to succeed. The study of Sturges (1999) was selected due to her affiliation with the Department of Organisational Psychology at the University of London at the time of the study and the fact that the research output was a copyrighted article of the British Academy of Management. This contributed to the credibility of the work. It was used in particular to guide the envisaged study since it addressed shortcomings of career theory, namely the lack of conceptualisation from the individual's perspective. Sturges (1999) recorded a useful description of these conceptions of success which were investigated in a large company with variables in gender, age, range of organisational divisions and managerial functions performed by managers. It was felt that this approach elicited a wide spread of definitions of career success which the ODL Library middle managers could relate to. Since these were developed with robustness of the conceptualisation, it therefore guided the study's interpretation in terms of an understanding of managerial success. In 2015 the researcher sent a follow-up request to the author for information on the validity of the research. Sturges (1999) confirmed the validity as follows:

“Since the research was qualitative, discussion of statistics or reliability/validity in the quantitative sense of the word was not appropriate. The findings were, however, robust.”

2.1.2 Concept map of the research literature

A map of research literature provides direction in terms of where information would be obtained from. In this study it is in the form of a conceptual framework which shows the relationship between concepts and the phenomenon under investigation. This means that the framework is derived from concepts/ constructs which provide an 'understanding' rather than a theoretical explanation. Ngulube et al. (2015:48) explain the characteristics of a conceptual framework in the research process, namely that it provides coherence for research as it is a scheme for selecting and prioritising variables of interest to the researcher, introduces explicitness to research processes, enables readers to be clear on what the research seeks to accomplish, demonstrates coherence between empirical and conceptual conclusions and offers a self-audit facility to ensure cohesion and appropriate conceptualisation for research conclusion.

They further explain that a conceptual framework is best depicted diagrammatically as the use of a flow chart depicts the key concepts and their relationships. Such a depiction is known as a concept map. The most general concept is put at the top of the map. Specific concepts that relate to the general concepts are then identified and linked to each other together with the general concept at the top to form a conceptual framework for enquiry. It can also be viewed as a concept map of the literature which demarcates the boundary of the study.

This explanation and suggestion from scholars in the most recent research, was used as a guideline to create a framework for this study. It was clear that the benefits of using a concept map would benefit the literature study since it provides a logical flow in examining concepts pertaining to development in the context of this study. Figure 1 depicts the expected outcomes of the literature study in the form of a conceptual framework. It starts with the general concept pertaining to the study namely 'development of Library middle management in an ODL environment' at the top. This broad concept relates to the research title and problem statement. Information in this regard was gained from a literature review which provided the theoretical perspective and from documents on the topic within the ODL environment. Related studies in this field provided insight as to what has been researched to cover the topic of development in libraries.

This framework was developed to guide the study as it leads to an understanding of the foundations of the theory and practice which impact on the development of ODL Library middle managers in order to be successful. Synthesis and evaluation at the end indicates the status of theory in library science according to the reviewed literature.

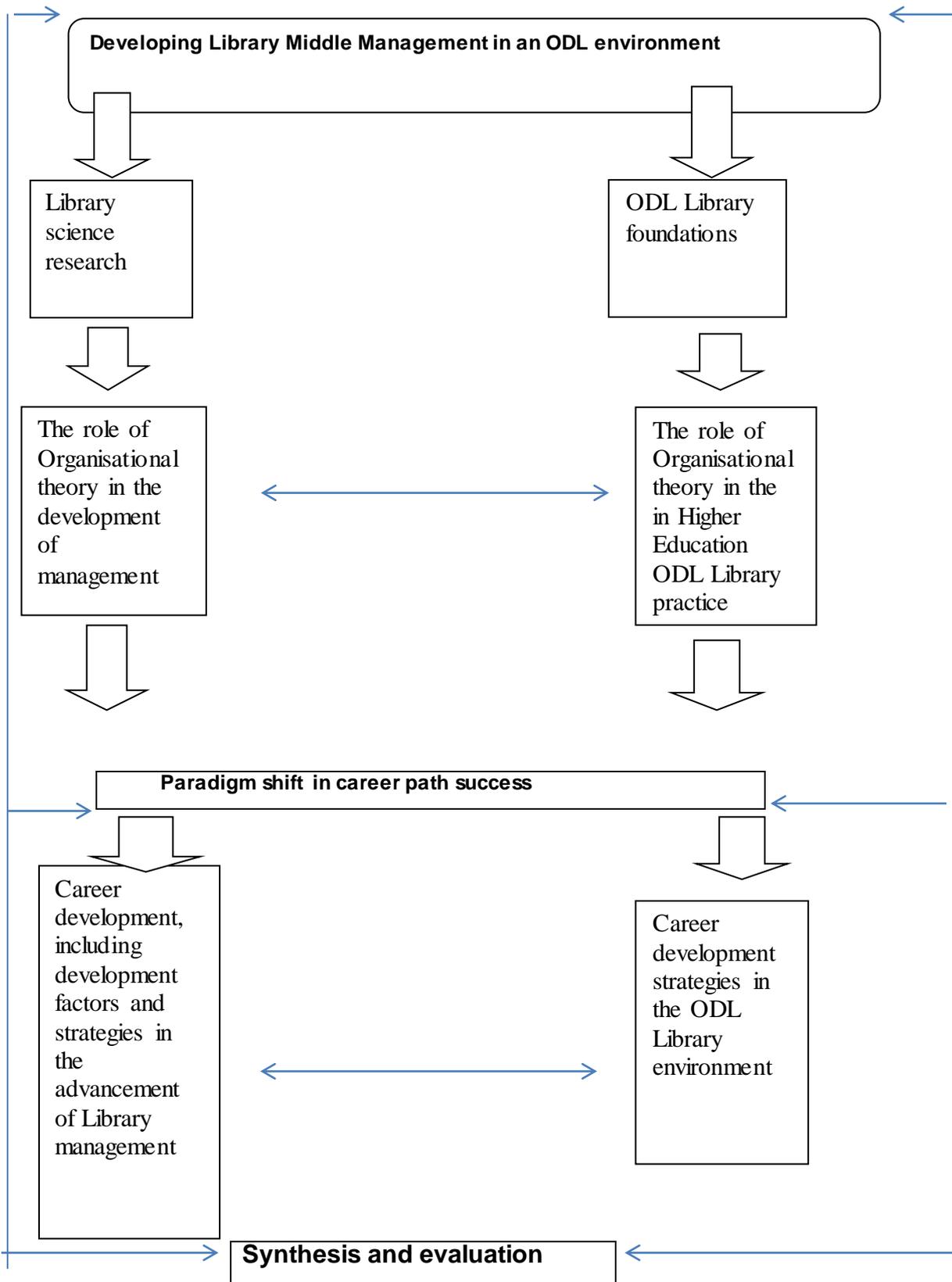


Figure 1: Concept map of the research literature and expected outcomes

2.2 DEVELOPING ODL LIBRARY MIDDLE MANAGEMENT

The management era, in which this study considers the developing of ODL Library middle management, places an emphasis on both tasks and people. In terms of the latter, Riccio (2010:1) explains that people can benefit from talent management as it focuses on developing high potential employees for future leadership positions, it occurs on all levels of the organisation and ensures continuous leadership development to sustain the organisation. Hellriegel et al. (2012:126), also considers talent management as one of the main concepts that drive quality in the contemporary management environment but add to this an equally important concept, namely the career paths of people. The aim is to establish a defined yet flexible career path within the organisation, including the identification of each individual's strength or talent and focusing on it. Other concepts that drive quality are foundational components of organisational development (including structures that capitalise on the ability of individuals to learn), a clear picture of organisational intent (vision and mission), the ability to address business needs strategically and a culture of continuous learning.

Against this background of the contemporary management environment, an understanding was fostered of the theory that relate to what management means and what managers do so that the importance thereof to perform the management role could be investigated as contributors to career success. Once that is known, the development of staff in terms of how they can be developed is discussed.

2.2.1 Management

'Management' in the context of a profession, emerged from business administration in the early twentieth century when organisations emerged and business people subsequently needed to meet the requirements of the science of business management, best practice and needs of business people (Cronje et al. 2007:29). Contemporary leaders in management lean on the leaders of the past when discussing the matter. Cole and Kelly (2011:14) allude to the fact that management must be discussed in the context of an organisation. They advise that this need to be discussed in terms of the explanation of Argyris (1960) who states that organisations are 'intricate human strategies designed to achieve objectives'. Cronje et al. (2007:139) allude to the fact that the term 'management' refers to the activities or management process, developed by Fayol (1949a). According to the definition of management provided by Fayol (1949a), 'to manage is to forecast and

plan, to organise, to command, to coordinate and to control'. The command and coordinate activity was later incorporated into the leading function. This definition is to the point and explains what managers do. They further state that this definition of Fayol (1949) is still valid, opposed to other definitions which are mostly broad. These management activities within the definition are widely discussed by Dessler (1985:29); Holt (1987:11); Cronje et al. (2007:140-143), Cole and Kelly (2011:17); Hellriegel et al. (2012:9); Du Toit et al. (2012:182-188). Holt (1987:10) states that each activity must be studied in isolation. A summary of the activities within the management process is therefore provided.

2.2.1.1 Management process

There are four activities within the management process. Cole and Kelly (2011:16) state that the planning activity involves decisions. Hellriegel et al. (2012:9) see this activity as the starting point of the management process; it involves management activities which determine the organisational identity so that a clear picture of organisational intent can be communicated through the mission and goals of the organisation, how it will be accomplished and how resources need to be deployed to realise them. Planning forms the basis of all tasks of management as it provides the direction of the business through organisational goals and subsequent actions of management.

The second integral component of the management process takes place when management combines human and other resources in a structured way and coordinates them to achieve organisational goals. The organising entails a detailed analysis of how work will be done and resources allocated, how the workload will be divided into activities, productive deployment and use of resources, and the grouping of related activities so the experts can perform their duties within an organisational structure which coordinates the activities of the whole business (Dessler (1985:116); Holt (1987:12); Cronje et al. (2007:157); Hellriegel et al. (2012:9).

Cronje et al. (2007:191) explain that the first two managerial activities mobilise or put the management process into action, but in the case of leading, management gives direction to organisational activities so that all the necessary resources are deployed. Leadership is a core element in the management process as it is the process of directing behaviour towards the accomplishment of its goals. Du Toit et al. (2012:210) accentuate the fact that leadership is not the same as management - management is broader in scope and comprises the four management activities of which leading is one. Hellriegel et al. (2012:9)

and Du Toit et al. (2012:212) explain the difference, namely that managers carry authority allocated by the organisation, whereas leaders get results through consulting and motivating followers, and subsequently obtain the necessary co-operation.

The final step in the management process pertains to control. Control procedures are used to ensure that progress is made towards the achieving of goals and that resources are used properly and productively. Control also forms the basis for a new cycle of management activities as feedback on outcomes influences the first step in the management process again, namely planning.

An understanding of the role of manager also relates to the tasks of managers and leaders. This can be understood in terms of a content analysis of the management and leadership tasks reflected in the literature, irrespective of the hierarchical level of the manager and leader (Nienaber 2010:665). The most recent content analysis study, consisting of an analysis of 80 works in the literature, was done by Nienaber (2010:665). The works were identified through leading business and management database searches in ProQuest, EBSCOHost, Emerald and SABINET, which enabled searches in 5200 different journals from 2004-2009 on the topic. The research captured 25 themes relating to management and leadership tasks. The tasks relate to the activities within the management process (Fayol 1949) as depicted by this study in Table 1 below.

Table 1: Management and Leadership activities and tasks
Sources: Fayol (1949) and Nienaber (2010)

Relationship with Management and leadership task	Relationship with Management activities
1. Assume responsibility for the survival and growth of the business 2. Anticipate the future 3. Set direction, including an organisational vision, a mission, goals, strategy	Planning
4. Empowering employees so that they can discharge responsibilities effectively 5. Ensure access to required knowledge, skills, assets, resources and processes so that value is provided to customers in the chosen arena 6. Ensure access to required knowledge, skills, assets, resources and processes so that value is provided to customers in the chosen arena 7. Honing staff abilities to ensure that they can achieve full potential 8. Select a competitive arena to compete 9. Determine what constitutes customer value	Organising
10. Communicate direction, including a shared understanding of direction 11. Mobilise employees to focus on their efforts on goal achievement 12. Determine priorities 13. Determine what goods and services customers desire, including the price they are willing to pay 14. Determine organisational performance in terms of Organisational view (ability, motivation, opportunity) and Customer view (opinion of value obtained) 15. Understand the environment in which the business operates (macro, market, micro) 16. Contracting with workers in a way that is advantageous to both them and the firm 17. Empowering employees so that they can discharge responsibilities effectively 18. Maintain and improve the wealth-creating capacity of the business 19. Determine what constitutes customer value 20. Ensure access to required knowledge, skills, assets, resources and processes so that value is provided to customers in the chosen arena 21. Maintain an information base to - establish needs - gather and evaluate information - use information 22. Empowering employees so that they can discharge responsibilities effectively 23. Considering the emotion of staff which contributes to building trust	Leading
24. Ensure access to required knowledge, skills, assets resources and processes so that value is provided to customers in the chosen arena 25. Ensure adherence to the principles of productivity in accomplishing the goals of the business	Control

The discussion on what managers do and their related tasks is a response to Research question 1 (sub-question 1.1).

2.2.2 Development

The term 'development' relates to 'human resource development' which refers to a set of systematic and planned activities designed by an organisation to provide an opportunity to learn new skills to meet current and future job demands (Cronje et al. 2007:207). Development of staff is the responsibility of the institutions human resources department. Development is considered to be an overall concept which includes both the training and the development concept, and learning is at the core of all human resources development activities (Cronje et al. 2007:207; Du Toit, Erasmus and Strydom 2012:304-306). This view was long ago expressed by Honey (1986:271), who acknowledged that organisations have a role to play and that they should see education and training as a part of their strategy for achieving objectives. The development of the management staff category includes team development (Pugh 2005:152). Cronje et al. (2007:579) allude to the fact that development leads to improved productivity and is best addressed through vocational training. Considering the fact that it has often been said that human resources are an organisation's greatest asset, it makes sense to identify other career development strategies that address the gaps that need to be filled and to subsequently develop and support management in those areas which will lead to a successful career path.

However, the development of staff is not only the responsibility of the institution. Golden (2006:177) states that the responsibility of the employee's career path resides primarily with the relevant middle manager. She explains this statement in terms of the views of Bernthal, Rioux and Wellins (2004:2), namely that managers will have to apply methods of professional advancement through self-development in future in order to increase their own marketability. It is thus important for staff to be able to apply self-management as a competency.

This is a response to Research question 2.1 stating who is responsible for development and growth.

2.2.2.1 Development processes

The development process pertains to human resource activities within the institution's functional management and includes, inter alia, recruitment and selection and employee development and training, as well as the development of managerial competencies (Cole and Kelly (2011:452). Cronje et al. (2007:208) and Hellriegel et al. (2012:246) state that human resources activities commence when an employee joins the organisation and continue throughout the career of the staff member. Upon placement of the successful candidate into a vacancy, the newly appointed employee must go through a process of induction. Cronje et al. (2007:207) state that thereafter the Human Resources manager is responsible for the creation of opportunities to develop the person further. Human resources development programmes must integrate long-term plans and strategies of the organisation.

2.2.3 Training and development

Cronje et al. (2007:207) state that training refers to the knowledge and skills needed to do a particular task. Technical training refers to non-managerial tasks to be performed physically and does not include management training. Cronje et al. (2007:208) state that management training pertains to the four management activities discussed above. The activities are normally introduced to the prospective manager through formal training and further developed through experience and workplace training programmes. Emphasis is placed in particular on the leading or directing activity in management training. Daft and Marcic (2009:21) state that coaching and mentoring are strategies to develop forward thinking managers. This relates to the sustainability of the organisation through an ability to address current business needs strategically. Sayles (1993:83) alludes to the fact that, although jobs may get done and functions performed by managers who are not leaders, they do not add up to organisational effectiveness without leadership.

Developmental activities, however, have a long term focus to prepare for future work responsibilities as part of the person's career path while increasing the capacities of employees to perform their current jobs (Cronje et al. 2007:207). Career paths within the organisation are thus established while talent management is practiced with the aim of identifying each individual's strength or talent and focusing on it (Hellriegel, Jackson, Slocum, Staude, Amos, Klopper, Louw and Oosthuizen 2012:126). Cole and Kelly

(2011:511) state that talent management is a strategic integrated approach to develop a skilled and talented workforce. It targets recruitment, development and retention.

Cronje et al. (2007:207) state that the development needs of staff can be addressed by a sub-division of the human resource activity that distinguishes between development components such as training and development; learning; and technical and management training. Cole and Kelly (2011:509), Cronje et al. (2007:208-210) and Du Toit et al. (2012:304-306) place the various management development methods into the following categories which could be specified in a PDP for implementation. A discussion of these methods relates to Research question 2.2.

- Informal training inside the work situation is done through an official job-related training programme or preferably mentoring and coaching by the line manager. Brine (2005:1) states that new entrants to the profession have always needed to obtain practical training beyond their academic studies, such as mentorship. Parsloe (2005) also explains the importance of both mentoring and coaching.
- Formal training inside the work situation is done through a training process in which a formal qualification is obtained, for example, in the case of a learnership.
- Informal development outside the institution pertains to training programmes, the public seminar, programmed instruction or fixed reading programmes (Cronje et al. 2007:209). Cole and Kelly (2011:509) categorise this type of training as Continuing Professional Development (CPD).
- Formal development outside the institution entails formal study programmes of educational institutions such as universities, technikons or colleges. According to Cronje et al. (2007:210), extensive and general training contributes to the employee's general development rather than training the person for a specific job.

2.2.3.1 Role of the learning organisation in management development

Cronje et al. (2007:356; 359) allude to interrelated building blocks in learning organisations which can contribute to the learning experience of middle managers in the ODL Library. A significant contributor to the learning experience is shared leadership which is characterised by shared decision making. In accordance with the Shared leadership theory, decision-making and leadership are shared. This theory contributes to a culture which aligns with the goals of a learning organisation (Hellriegel et al. 2012:357). Leaders

facilitate the creation of a shared vision and then keep organisational members working towards the vision and encourage a collaborative environment critical to learning. Cawthorne (2010:151) alludes to the importance of leader influence on the middle manager level and its contribution to shared leadership.

Coupled to the demand for leader influence on the middle management level is the institution of a leadership-driven organisation whereby all staff can participate in leadership roles. Raubenheimer (2004:112) reported in a study which was conducted on leadership roles in an ODL Library that the contemporary academic information service enterprise requires leadership structures that support not only the business processes but also leadership structures which accommodate leadership activities such as mentoring and coaching. This was also emphasised by Raubenheimer and Muller (2006:1) who allude to the fact that staff should be involved in planning that could lead to organisational change. Hellriegel et al. (2012:127) state that other building blocks of a learning organisation include contributors to the learning experience such as strategic alliances and networks without boundaries and use of information whereby tacit knowledge is developed through shared problem solving and organisational learning.

In response to the first research question (sub-questions 1.1 and 1.2), this discussion on management theory explained what management do; and in response to the second research question (sub-questions 2.1-2.3), it is explained how management can typically be developed. Against this background, a discussion on LIS theory, which is applicable to this study, follows.

2.3 USE OF THEORY IN LIBRARY AND INFORMATION SCIENCE RESEARCH

Theory within research, according to *Roget's II* (1988: 1006), is defined as 'something taken to be true without proof, meaning that it a true 'assumption'. Visual thesaurus online (2015) explains that theory is a 'belief used for the basis for action', with the synonym as 'hypothesis'. Imenda (2014:186) states that the most common features of the definition of theory pertain to 'explaining' and 'making' about the occurrence of the events, based on specified relationships. In this study, the study's connection with theory is interpreted in terms of these definitions. Theory or concepts that explain factors and strategies that optimise the career path of Library middle managers were considered to foster an understanding of the meaning thereof and to be used for further investigation in an ODL environment.

The use of theory in LIS is nothing new. In a study conducted by McKechnie and Pettigrew (2002:404) on the use of theory in LIS, it was found that 34 percent of articles incorporated theory in either the abstract or title. Articles dealing with social science papers (information behavior and the topic of management) incorporated theory in 98 incidents per article. The research, however, indicates that differences exist in the use of theory in LIS that are associated with the broad disciplinary content of the research. The differences may arise from the variant conceptions of and approaches to the use of theory in the research traditions of the humanities, social sciences and sciences.

Ponti (2008:265) adds another connotation to the use of theory in LIS by stating that there is a wide gap between librarians and information science researchers, resulting in Library and Information science scholars not sharing a single view on what library science consists of and how it should be used in research. This can be ascribed to the fact that librarians mostly focus on practice and therefore conduct studies on the library as such, while academics conduct use and user studies. In this regard, Liehr and Smith (1999:2) make a connection between theory and practice by stating that the former guides the latter, while practice enables the testing of theory and generates questions for research. Research then contributes to theory building and selecting practice guidelines. In this regard, Imenda (2014:188) alludes to the fact that scientific theory is a substantiated aspect of the natural world, based on a body of facts that has been repeatedly confirmed through observation and experiment. Theories are also defined with regard to their scope and relative level of abstractness of their concepts. It can therefore be classified as grand, middle range or just as concepts and propositions where middle range theories are seen as bigger than individual concepts, but narrower in scope than grand theories as they are composed of a number of concepts that relate to limited aspects of the world. Concepts and propositions of middle range theories are empirically measurable. The meaning of concepts is largely influenced by their context.

Within library and information science, theory refers to the principles and practices of library operation and administration and their study (online *Encyclopaedia Britannica*, 2015). Theories typically used in library science studies with a focus on operation relate to information seeking and retrieval, use, functions of the library and concepts drawn from library data. In a LIS study conducted by Mavodza (2010), Mavodza (2010:58) states that there is no single theory that addresses library science as a whole. The following theories relate to library functions and practice and are therefore used in LIS studies relating to the operations:

- Critical realism theory, mostly applicable to studies on information seeking and use (Wikren, 2005)
- Fuzzy set theory, mostly applicable to studies on information retrieval based on Boolean logic (Zadeh, 1965)
- Probability theory, mostly applicable to studies on library use and document delivery (Bensman, 2007)
- Grand unified theory, mostly applicable to studies on the different functions of the library (McGrath, 2002)
- Grounded theory, mostly concepts drawn from the data rather than from abstract theory as alluded to by Glaser and Strauss (1967).

Since this study does not focus on library operations, theories typically used in library science studies with a focus on administration were considered. This investigation serves as a response to Research question 1 (sub-section 1.2) which relates to theory that impact on management responsibilities. Cole and Kelly (2011:13-14) allude to the fact that the administration concept relates to the management concept. However, the latter encompasses much more than administration. Administration is seen as an aspect of organising compared to management which includes the management activities. The management task is to enable the organisation's purpose to be defined and fulfilled by adapting to change. This indicates the importance of management and administration to be applied in LIS. The importance thereof in LIS was, however, more than a decade ago confirmed by the fact that course work in management and administration is required by approximately 60% of the LIS masters programmes accredited by the American Library Association. These LIS courses pertaining to administration and management are developed from organisational theory (Trosow 2000:129).

This points at an acknowledgement of organisation theory in LIS studies and a subsequent multi-disciplinary approach to research. McKechnie and Pettigrew (2002:404) suggest that the inter-disciplinary background of LIS researchers should provide an opportunity for the use and development of theory within LIS. Mavodza (2010:39) alludes to the fact that Grover and Greer (1991:101) made a useful contribution when it was pointed out that in the case of inter-disciplinary research, the LIS field's research questions can be answered by a related field. In terms of this study's focus on management and its research question, questions can be answered by the related field which focuses on organisational theory and management theory.

Both organisational theory and management theory have changed throughout the years to include administrative reality, principles management and a dichotomy between the classical school and human relations school of thought (Trosow 2000:129). Also, notions of organisations as a closed system have changed to an understanding of the open nature of organisations and interdependency with the environment. Trosow (2000:129) alludes to the fact that, compared to the emerging information technology and accompanying information of society, organisational and management theory in LIS have not received the attention they deserve. Kirk (2004:35) states “it was merely a pre-occupation with one best way to organise a library”. The focus was subsequently not on contextual management development models for libraries.

Cronje et al. (2007:132) state that contextual management development models are based on management theories which are important for the present and future success of a business. These models were derived from empirical studies which arose to establish what it takes to perform the role of manager, what the managerial approach should be and what competencies relate to the approach (Cronje et al. 2007:134). Cronje et al. (2007:138) accentuate the importance of the historical context of management on which these matters are based. It provides a broad body of knowledge on management with regard to research, principles, problems and approaches to management from which management can draw since it evolved over years. Hellriegel et al. (2012:104) and Cole and Kelly (2011:123) state that this broad perspective does not provide a single consistent theory of management to be applied universally. The respective theories, however, provide answers to the same question, namely ‘what is the best way to manage an organisation’. The answer to this question is closely linked to the answer to another question, namely ‘what management fundamentals lead to success? Answers to these questions will inform how managers should be informed. In this regard, Cole and Kelly (2011:123) categorise the management theories in terms of management fundamentals.

2.3.1 Categorisation of management theories

These management categories, from which the principles are drawn, pertain to classical theories of management; human relations and social psychological theories; theories of leadership and group behaviour, systems and contingency approaches to management theory; and modern approaches to management theory. Table 2 below contains the details pertaining to each category and the related principal concern and benefits to the ODL Library.

Table 2: Categorisation of Management theories and related concerns

Source: Adapted from Cole and Kelly (2011)

Management category	Principal concern	Benefits to the ODL Library
Classical theories	Focus on general principles of management (Fayol) and an introduction to scientific management (application of work study techniques to the design and organisation of work to ensure maximum productivity and output, job design and practice).	<ul style="list-style-type: none"> • Management has a rational approach to organisation of work and processes to be measured resulting in improved work methods and work conditions for staff based on results • Management recognises that large organisations are bureaucratic, need formal rules and procedures in a hierarchical system of authority.
Human relations theories Psychological theories and theories of leadership	Focus on the human factor in terms of people’s behaviour, particularly human motivation, group relationships and leadership.	<ul style="list-style-type: none"> • Acknowledgement that managers get work done through others • Knowledge of what motivates staff to perform towards attaining the goals of the organisation.
Systems and Contingency approaches to Management theory	Focus on the organisation as an open system of interrelated sets of activities which enables inputs to be converted to outputs; explanation of organisational behavior in a multi-dimensional way at a specific time by considering people, structure, technology and environment	<ul style="list-style-type: none"> • Provide a basis for organisational analysis • Understanding that in organisations the systems consist of people, structures and processes that work together to attain goals • Value of the theory of systems thinking as the cornerstone of the Learning organisation. • Focused on employee involvement and employee empowerment.
Modern approaches to Management theory	Focus on practicing managers in modern organisations who develop a strategic mission to ensure effectiveness.	<ul style="list-style-type: none"> • Acknowledgement of the difference between doing things right and doing the right things.

Contemporary managers must use the ideas from the management approaches which suit the particular requirements of their culture, organisation and job. In some cases, classical

theories and principles may be adopted together with systems theory and contingency approaches, and in other cases the ideas from the human relations movement may apply (Cole and Kelly 2011). In terms of this study's endeavour to determine what leads to success, it certainly shares the principle concern of all the respective categories but it has a strong relation with organisation theory as this theory focuses on the role of management that lead to success within organisational structures.

Similarly to discussions on the management theory, approaches to organisation theory also follow the pattern of classical, human relations and systems perspectives. Cole and Kelly (2011) summarise management in the context of organisational theory as follows.

2.3.2 Organisation theory

Organisation theory pertains to the study of the structure, functioning and performance of organisations and the behaviour of groups and individuals within them (Cole and Kelly 2011:15). Management within the context of an organisation should be considered in terms of the management position in an organisation which provides "the framework of the management process" (Brecht 1965). Based on the thoughts of the other traditionalists, Fayol (1949) emphasised formal structure and processes as necessary for adequate performance of all important tasks, and a clear definition of what needs to be accomplished and how this aligns with organisational goals. The focus is on the role of the manager and basic managerial tasks, namely planning, organising, leading and controlling, which represent a distinct function, namely general management which dominates and co-ordinates other management areas from the top level. This management process is evident in every business function performed by the lower and middle management levels.

Cole and Kelly (2011:14) further allude to the fact that an organisation is a group of people with a common purpose who work together to achieve shared goals. The formal organisation is specifically designed by management to achieve organisational goals, whereas the informal organisation is formed through relationships with people.

The impact of the behavioural sciences on the study of people has led to the ascendancy of organisation theory over management theory. This means that management is no longer considered to be the controlling factor in work organisations, but rather is viewed as a function of organisations. Its task is to 'enable the organisation's purposes to be defined and fulfilled by adapting to change and maintaining a work balance between the various

and conflicting pressures at work in an organisation' (Cole and Kelly 2011:15).

This relationship, as reflected by management and organisation theory, influences the role of the manager as management subsequently has to focus on key variables, namely people; work and structures; systems and procedures; goals of the organisation; available technology and the culture of the organisation. Since these factors interact with each other a successful manager should balance these factors in a way that meets the needs of the organisation at a particular time. This relates to the contingency approach to management (Cole and Kelly 2011:15-16).

2.3.2.1 Contingency model in organisation theory

Kirk (2004:35) explains that contingency theory had its beginnings in the context of fundamental changes in social science research and the dissatisfaction of one dimensional management theories when library management authors had a preoccupation with the best way to organise a library. As a result of the evolution of management theory and social science framework, theorists started to align management models with realities of practitioners. Kirk (2004:38) concluded that there is a place for the contingency perspective in the real world of academic library management. The theory provides a model of organisations as social systems in which diverse factors influence the organisation's effectiveness. Kirk (2004:38) further states that while theoretical and practical spheres have a common framework and perspective, they 'remain separate because they have different environments and tasks. They can learn from one another but cannot become one'. This statement is supported by Gray (2004).

Hellriegel et al. (2013:119) allude to the fact that the essence of the contingency viewpoint is that practice should be consistent with the requirements of three elements namely the external environment (relating to how the parts fit together (inputs, transformations and outputs) as indicated by the systems viewpoint); technology (management actions relating to what managers do as indicated by the traditional viewpoint) and the capabilities of people involved (how managers influence others as indicated by the behavioural viewpoint) in the environment in which the organisation operates. These three elements are central to the contingency model which suggests that theory serves the needs of practice and practicing managers. Theory is driven by two fundamental objectives of organisations, namely efficiency (do things right) and effectiveness (do the right thing). In accordance with the contingency viewpoint, managers are expected to determine methods

which are likely to be more effective than others in a given situation in order to deliver on this objective - this requires development in the use of the three viewpoints central to the contingency model and use of all six managerial competencies (Hellriegel, Jackson, Slocum, Staude, Amos, Klopper, Louw and Oosthuizen 2004:60-61; Hellriegel, Jackson, Slocum, Louw, Staude, Amos, Klopper, Louw, Oosthuizen, Perks and Zindiye 2013:120). The traditional viewpoints require management competencies that efficiently organise the work of staff, the behavioural viewpoint focus on the development of communication and teamwork and the systems viewpoint requires management to develop communication, strategic thinking and global awareness competencies.

2.3.2.2 Application of management theories to developing countries

Hafsi and Farashahi (2005:1) allude to the fact that, for many years, management theories and practices were debated by researchers as an issue of concern as it was not clear whether these can be applied to developing countries. Cross-cultural researchers believed that there is no universal theory of management. Researchers with a universal view, on the contrary, believed that culture does not impact on the applicability of management theories and that management practices around the world are similarly practiced in accordance with the theory of Mintzberg (1973).

In 1983, Kiggundu, Jorgenson and Hafsi (1983:1) investigated the applicability of management theories to developing countries and concluded that these theories were only applicable where the organisation could be considered a closed system. In 2005, Hafsi and Farashahi (2005:484) reviewed 170 articles published over 20 years since 1983 to test the hypothesis. In the research they investigated the extent to which organisations and management activities in developing countries are described by management theories from developed countries. The results of the research revealed that there have been significant changes that affected managers in developing countries. This resulted in the adoption of new ways and practices common in Western, developed countries. It was explained that theory developed in the West is more encompassing and therefore in a better position to consider and explain practices observed in developing countries. There were also significant changes in the practice of management, namely globalisation of markets, industries and firms, an increasing influence of international organisations and similarity among management training standards that have resulted in similar behaviour among nations and public sector organisations. There is a wide spread applicability of Western-based general management concepts and general management theories

applicable to developing countries. This was the case in all the articles surveyed, regardless of the nature of the research undertaken, namely empirical or theoretical; cross-sectional, longitudinal or historical, public or private or geographical distribution of the regions covered by the studies. It was concluded that developing countries are considered part of the scientific development, even though they present different contexts and circumstances. This means that they relate to well-known concepts and theories, and discoveries made in developing countries could be invoked to discuss issues that are salient in developed countries (Hafsi and Farashahi 2005:504-506).

Developing countries can thus relate to contemporary management which reflects the evolution of concepts, views and experience gained over many decades as far back as the nineteenth century (Hellriegel et al. 2004:47; Cronje et al. 2007:134,138).

2.3.3 Management competencies derived from management theories

This discussion on managerial competencies is a response to Research question 1 (sub-question 1.3) which relate to management competencies and skills, based on reported management theories.

A competency is an ability to perform activities within a function to the agreed standards. Competence refers to the person's performance of a task (Cole and Kelly 210-211). Managerial competencies are measurable clusters of knowledge, skills and abilities considered in determining how managers accomplish goals. The competency is not measured directly, but indicators (observable behaviours that provide information about the relevant competency) are measured (Cole and Kelly 2011:505). Competencies are sets of knowledge, skills, behaviours and attitudes that a person needs to be effective in a wide range of managerial jobs and various types of organisations (Hellriegel et al. 2012:30). These competencies are transferable from one organisation to another (Hellriegel et al. 2004:12; Cronje et al. 2007:134).

As part of a research study, Hellriegel et al. (2004:5) identified six competencies which are considered as key managerial competencies in accordance with widely accepted management theories. Cronje et al. (2007:134) and (Hellriegel et al. (2013:27) more recently confirmed that the practicing of these competencies, which relate to seven widely accepted management viewpoints, still apply to the job of the contemporary manager. It was concluded that these essential competencies that lead to management success, need to be acquired (Hellriegel et al. 2012:xviii). They are communication, planning and

administration, teamwork, strategic action, global awareness, and emotional intelligence and self-management (Hellriegel et al. 2012:12).

Hellriegel et al. (2013:130) allude to the fact that some management theories that relate to these competencies have a strong focus on one competency whereas other viewpoints draw from a different set of competencies. Hellriegel et al. (2013:131) depict the integration of these seven management theories with the respective competencies in Table 3.

It is noted that all management theories acknowledge at least one of the competencies as important. The two relatively new approaches noted in the literature, namely flexible and principle-led approaches, which were developed during a management era in which the management of knowledge was considered to be of great importance and during which the ethics of business were questioned due to a global financial crisis, accentuate all six of the competencies as important. These two new management approaches accentuate four of the competencies as extremely important. These are communication, strategic action, emotional intelligence and self-management, and teamwork. Although some of the theories acknowledge these, they are only considered to be important, whereas the two new management approaches accentuate these four as extremely important competencies. In developing middle management in the 21 century, all six competencies should be noted as part of the development plan and the four competencies which are considered extremely important should receive attention in particular to ensure that middle-management can apply these within their career path.

It is noted in the literature that researchers select these essential competencies as part of their research studies on management effectiveness, including investigation on the attitudes of business managers towards important competencies. In this regard, these six competencies were identified by Steyn and Steyn (2006:322-340) for a study on how newsroom managers can improve their performance.

Table 3: Integration of Management theories with competencies
Source: Hellriegel et al. (2013:131)

Managerial Competency	Traditional	Behaviour	Systems	Contingency	Quality	Flexible and Principle-led
Communication		X	X	X	X	XX
Planning and administration	X			X		X
Strategic action			X		X	XX
Emotional intelligence and Self-management					X	XX
Global awareness			X		X	X
Teamwork		X		X	X	XX

Key: X= Important; XX = Extremely important

A brief discussion of the competencies is provided as follows.

2.3.3.1 Communication

Both Cronje et al. (2007:189-190) and Hellriegel et al. (2013:32-35) accentuate the communication competency as a very important component of leadership since effective leadership is dependent on constant communication between the manager and subordinates and the environment. Hellriegel et al. (2013:32) allude to the fact that this competency may be considered to be the most fundamental and applicable to all management levels. Other competencies cannot be used effectively without the manager being able to express them. There are three dimensions within the communication competency which reflect the required skills, knowledge, behaviour and attitude of the manager:

- Informal communication which promotes two-way communication by soliciting feedback, listening, seeking opinions and creating a give and take conversation. Communication should be flexible. This means that it changes approach in different situations and with others from diverse backgrounds. Informal communication builds strong inter-personal relationships with a diverse range of people as it shows sensitivity to the diverse needs, opinions and feelings of others. As managers need to walk the talk, they must be aware that people at all levels observe non-verbal

communication through the tone of voice and nuances. Managers build a social network of contacts through informal communication.

- Formal communication in more formal situations is also important to managerial effectiveness. This means of communication informs people and keeps them up to date; high impact public presentations and clear written messages are conveyed in this manner through traditional or electronic media. Formal communication can be conveyed through newsletters, weekly visits to staff, public speaking and conversations with suppliers and partnership leaders (Hellriegel et al. 2013:32).
- Negotiation is a way of communication normally done on behalf of the team (Pugh 2004:19). Negotiation and collaboration are closely linked and negotiation skills are key in the 21st Century. Hellriegel et al. (2013:35) confirm this stating that managers should feel comfortable with the power of the managerial role, be skilled at developing relationships and exercising power upward with superiors, laterally with peers and downward with subordinates, and building consensus on goals and commitments.

2.3.3.2 Planning and administration

Cronje et al. (2007:141-142) state that planning provides direction, promotes coordination, compels managers to look to the future, ensures that businesses keep abreast with technology, ensures cohesion and promotes stability. It can therefore be considered as the basis of all four of the management tasks and is indispensable.

Hellriegel et al. (2013:35-36) state that because planning determines the mission and goals of the business, the four dimensions within the planning and administration competency which reflect the required skills, knowledge, behaviour and attitude of the manager pertain to:

- Information gathering, analysis and problem-solving, which include monitoring of information, identification of problems, considering alternative solutions in a timely manner, taking calculated risks and anticipating consequences.
- Planning and organising projects, which include developing plans and schedules to achieve specific goals, assigning priorities, determining and obtaining the necessary resources and delegating responsibility for task completion.

- Time management, which refers to the handling of several issues and projects at a time, monitoring and keeping to a schedule and altering of the schedule as required and working effectively under pressure.
- Budgeting and financial management. This includes understanding the budget and related reports and using the information, keeping accurate and complete financial records and creating budgetary guidelines.

2.3.3.3 Teamwork

Cronje et al. (2005:17) and Hellriegel et al. (2013:36) accentuate the importance of teamwork. Hellriegel et al. (2013:36) explain that teamwork competency refers to accomplishing tasks through small groups of people who are collectively responsible as their work is interdependent. The three dimensions within the teamwork competency which reflect the required skills, knowledge, behaviour and attitudes of the manager are:

- Designing teams properly. This includes clear formulation of objectives that inspire team members, staffing the team while considering the value of diverse perspectives, technical skills and development goals, defining the team responsibilities as a whole and facilitating the allocation of tasks and responsibilities to individual team members and the creation of systems for monitoring team performance.
- Creating a supportive team environment. This refers to the creation of a team environment characterised by empowerment in which effective teamwork is expected, recognised, praised and rewarded; and assisting the team by providing the required resources to accomplish its goals. The manager also acts as coach, counsellor and mentor and must be patient with team members as they learn.
- Managing team dynamics appropriately refers to the understanding of the strengths and weaknesses of team members and using their strengths to accomplish the tasks as a team; and bringing conflict and dissent into the open and using it to enhance the quality of decision-making while ensuring co-operative behaviour and attainment of goals. Managers who lack teamwork competency are noticed as rude or unsympathetic (Cronje et al. 2005:17).

2.3.3.4 Strategic action

Both Cronje et al. (2007:48-49) and Hellriegel et al. (2013:38-39) relate the strategic action competency to an understanding of the overall mission and values of the organisation and ensuring that both the manager's actions and the actions of the staff being managed are aligned with them. Hellriegel et al. (2013:39) explain that the three dimensions within the strategic action competency, which reflect the required skills, knowledge, behaviour and attitude of the manager, are:

- Understanding the industry, which refers to an understanding of the history of the organisation, staying informed of the actions of competitors and strategic partners; analysing general trends in the industry and their implications for the future, and quickly recognising threats and opportunities due to environmental changes (Hellriegel et al. 2013:39).
- Understanding the organisation, which refers to the ability to understand and balance the concerns of stakeholders, understanding the strengths and limitations of business strategies, distinctive competencies of the organisation, various organisational structures and the corporate culture of the organisation.
- Taking strategic actions, which refers to the execution of specific plans that reflect cross-functional and cross-divisional knowledge, decision-making in accordance with the mission and strategic goals, the recognition of alternative strategies, consideration of the long-term implications of actions to sustain and develop the organisation and operational goals that facilitate strategy implementation.

2.3.3.5 Globalisation

Cronje et al. (2007:581) state that globalisation involves interdependence among countries as reflected by increasing cross border flows of goods, services, capital and know-how. This creates a new world order for firms around the world. Global awareness is an important competency to develop should the organisation in which the manager operates have global markets for its products and services. In order to serve markets that span multiple cultures requires a well-developed global awareness competency (Hellriegel et al. (2013:39-40). The dimensions within the global awareness competency, which reflect the required skills, knowledge, behaviour and attitude of the manager, are:

- Cultural knowledge and understanding, which refer to staying informed of political, social and economic trends and events around the world, recognising the impact of global events on the organisation, travelling to the country in which the organisation has an interest, understanding and reading the language of the country, and having a basic vocabulary in the language relevant to the job.
- Cultural openness and sensitivity that pertain to understanding the nature of national, ethnic and cultural differences, being sensitive to cultural cues and being able to adapt to situations, recognising that there is a variation within any culture and the avoidance of stereotyping. It requires appropriate adjustment of own behaviour when interacting with people from various national, ethnic and cultural backgrounds, understanding how one's own cultural background affects attitudes and behaviours and lastly empathising and seeing from different perspectives while still being secure in the self and therefore being able to act in confidence (Hellriegel et al. 2013:40).

2.3.3.6 Emotional intelligence and self-management

Ouy Nguyen (2001:76) states that middle managers, as agents of change, require emotional intelligence. Research on emotional intelligence and self-management revealed that beyond a functional IQ threshold of 110-120, emotional intelligence is a much better predictor of social influence and success than IQ, particularly when high human skills are required (Ouy Nguyen 2001:78). Emotional intelligence is the ability to perceive, assimilate, understand and manage emotion. It is required to learn and behave well and is a strong predictor of success in life (Hellriegel et al. 2012:42). Hellriegel et al. (2013:42-46) state that the four main emotional intelligence dimensions are self-awareness, self-management, social awareness and relationship management, and explained these as follows. Self-awareness is central to emotional intelligence as self-management and social awareness are reduced without it. Ouy Nguyen (2001:78) supports this view stating that managers with self-awareness are able to take concrete actions that allow the organisation to benefit from high levels of adaptation and learning during radical change.

- Self-awareness refers to the ability to recognise the self-emotions and effect on others (self-awareness) as well as the ability to assess (self-assessment) one's strengths and limitations and have a sense of self-worth and one's capabilities (self-confidence).

- Self-management indicates an understanding of the self and how to motivate oneself and also to understand how to control disruptive emotions (self-control), maintain standards of integrity and honesty (trustworthiness); guides to meet internal standards of excellence (achievement orientation) and ability to act (initiative).
- Social-awareness indicates social awareness or understanding of others and takes an active interest in their concerns at a personal level (empathy), organisational level (organisational awareness) and recognises needs of customers (service orientation).
- Relationship management indicates good management or social skills which means the ability to lead others, including being aware of the development needs of others, inspiring and leading groups (leadership), wielding interpersonal influence, sending clear communication, and managing change as a change catalyst, building effective relationships and achieving goals through teamwork, and resolving agreements (conflict management).

The self-management competency implies taking responsibility for your life at work and beyond. The five dimensions within the self-management competency, which reflect the required skills, knowledge, behaviour and attitude of the manager, are explained by Hellriegel et al. (2013:45) as follows:

- Integrity and ethical conduct, which refer to clear personal standards that maintain a sense of integrity and ethical conduct, being honourable and steadfast and not only telling people what they want to hear, and willingness to admit mistakes and accept responsibility for one's own actions.
- Personal drive and resilience, which indicates a willingness to be innovative and risk taking, being ambitious and motivated to achieve objectives (without putting personal ambition ahead of organisational goals), working hard to complete tasks and showing perseverance in the face of obstacles.
- A balancing of work and life issues, which implies that the manager strikes a balance between work and other life activities so that neither aspect of living is neglected, taking care of the self mentally and physically and using constructive outlets to vent frustration and reduce tension.
- Self-awareness and development, which indicates clear personal and career goals, knowing own values, feelings and areas of strengths and weakness, accepting responsibility for self-development and learning, and developing plans

and seeking opportunities for personal career growth, analysing from work and life experiences a willingness to learn continually as changed situations for new skills arise. This includes both task-related learning to improve performance and prepare the person to perform in a new job, as well as learning of the self to assist a person to make wiser choices about career development. This means taking responsibility for career development by understanding the type of work which is desired and found satisfying and developing competencies which will contribute to long term success. In this regard, research shows that people who take advantage of development opportunities provided by employers learn much from them and advance more quickly in their career path than those who do not (Hellriegel et al. 2013:44).

- Spiritual intelligence is the ultimate intelligence of a person as it contributes positively to assess the most meaningful course of action. Through this intelligence problems of meaning and value are solved. Whereas emotional intelligence allows a person to judge a situation and to behave appropriately in it, spiritual intelligence allows a person to consider if it is necessary to be within the boundaries of that specific situation and allows guidance (Hellriegel et al. 2013:45).

Against this background information pertaining to the dimensions of self-management, the way management drive themselves towards career goals need further discussion since this may impact on their perception of success.

2.3.4 Management perception of success

Success is defined as ‘the favorable or prosperous termination of attempts or endeavors; the accomplishment of one’s goals’ (*Online Dictionary* (2015:1)). In accordance with the management category relating to human relations theories and psychological theories and theories of leadership identified by Cole and Kelly (2011:123), there is a need to require knowledge of what motivates staff to attain their career goals. This can be further interpreted as what drives a person towards success. Career success on the management level, can be interpreted in terms of the person’s perception of how he/she feels about the achievement of personal goals relating to success. For many years, success was merely measured in terms of the post level obtained in the management hierarchy of an organisation. This has changed due to flatter structures and subsequent fewer opportunities for placement in the institution’s management and it is therefore more often

measured in terms of effective management. Uquh (2011:5) states that although effective management relates to achieving organisational goals through the tasks to be performed in terms of management activities, the role of the personal goals of the individual, such as their ambition and desire, must also be considered as these goals influence a person's perception of success.

Sturges (1999:240) conducted a study in this regard since the organisational context of career success has changed. Careers will therefore no longer be predicated upon success within the organisational context. The study revealed that managers' conceptions of career success differ. It was found that career success exists from the point of view of the individual (Sturges 1999:251). Career development practices and career paths must therefore take the individual's belief into consideration. The findings presented by Sturges (1999) revealed conclusions drawn from an exploratory study on what career success means. The findings suggest that career success should be expressed in terms of orientational categories identified in the study. The categories should not be construed as representing different kinds of managers, but as a means of categorising ways in which participating managers talked about their career success. The categories were intended to provide a useful basis for a conceptualisation of personal dimensions of career success. The categories pertain to the climbers (grade criteria of hierarchical position and progression through promotion and reward criteria); the experts (achieving a high level of competency at their job and being recognised personally); the influencers (define career success as being able to do things at work which had a tangible and positive effect on the institution regardless of the person's position in the hierarchy); self-realisers (achieving success as an internal concept with a focus on balancing their work life and home life) (Sturges 1999:245-247).

In summary, managers relate success to four categories applicable to career success:

- Position in the hierarchy
- Recognition of the person's expertise and competencies and subsequent respect gained from colleagues for work done
- Positive effect of the person's work on the organisation
- Achievement on a personal level such as work life and home life balance

This response to an investigation on how staff define career success relates to Research question 2 (sub-question 2.4). In terms of the success definitions provided above, it is

necessary to foster an understanding of the expertise required by ODL Library middle managers in order to make a positive contribution to the ODL environment.

2.4 ODL LIBRARY FOUNDATIONS

The foundations of the ODL Library, used in this study as the research site, align with those of the institution. The basic purpose of the ODL Library in South Africa is to be the leading open distance education library in Africa. Its principal business is to provide access to global information through services appropriate to ODL. The Library's operations are primarily on the continent of Africa. Its strategic plan sets out what needs to be achieved. The focus areas of the plan pertain to the Library's priorities and where it focuses its energies and efforts. These focal points include the support of ODL research; client's satisfaction with the ODL Library services; the quality of ODL Library services; the support of ODL learners; ODL Learning as the basis of the services; as well as good governance, efficiency and productivity. It also focuses on innovation and development, excellent ODL capacity in libraries, professional leadership, and improved morale and staff welfare (Unisa Library 2014c: 1-21).

The first set of goals has a strong focus on the student-centered approach towards the delivery of service to a large, diverse client profile and subsequently client satisfaction. Since a high value is placed on service quality and staff capacity, ODL Library middle management must be developed to understand the quality demands pertaining to fitness for purpose of the ODL Library. The last goals relate to ODL capacity building, indicating the importance of leadership to build ODL capacity.

The practicing of management in an ODL Library of this nature has a strong connection with the business management environment as the academic library, of which the ODL Library forms part, has evolved into a business during the last few decades.

2.4.1 ODL Library as a business

Academic libraries are viewed as academic information enterprises because the characteristics of a business and an enterprise relate to this library type. Definitions pertaining to a business refer to the involvement of strong management, including leadership, and professionalism on the operational and strategic level, as well as the organisation's involvement in extensive planning (Raubenheimer 2004:20). Beckhard (1969:v) alluded to the fact, more than four decades ago, that enterprise managers are

involved in planning as they manage the organisation's human resources towards achievement of performance objectives. This applies to academic libraries.

At the beginning of the new millennium, Orenstein (2002:83) defined a small business as having one to twenty employees and a budget of approximately two million dollars. He further stated that a larger business exceeds this number of employees and budget size and confirmed that most libraries in the United States fall within this category of small businesses. In terms of this definition, Raubenheimer (2004:20) reported in 2004 that most academic libraries in South Africa fall within these categories and some, for example the ODL Library of the University of South Africa, far exceed the figures stipulated by Orenstein (2002:83). Since this was reported, the figures have grown significantly in accordance with a growth in student numbers (Unisa Library 2015a:1). This confirms the significance of academic libraries and illustrates how a large academic library forms part of the business environment as it reflects the characteristics of an academic information service enterprise.

In addition to the challenges within the business environment, the ODL Library must respond to challenges in both the LIS environment and the ODL environment. This includes service developments pertaining to access to information, its collections and the role of the academic librarian (Lynch 1998:19). It also responds to changes in higher education such as changes in student demographics, the nature of public support for higher education, scholarly disciplines and scholarly communication, and the changes in student expectations about higher education. In the new millennium, a growth in ICT-based education has been noted (Reddy and Manjulika 2006:20) and the needs and demands of researchers have changed considerably.

This impact needs strong management to identify the change and to take up the challenge of the spread of and unequal access to ICTs in the international arena (Reddy and Manjulika 2006:6). Moropa (2010:389) suggests that a further challenge faced by South African academic library management is to maintain a balance between the present situation, whereby services are delivered to current users, and the future, namely to design appropriate services and products for the academic library client of the future. Mbambo-Thata (2010:469) states that these services are made possible through the use of mobile phones which have expanded service opportunities for business, social and educational transactions. These changes require libraries to consider new missions, goals, objectives, structures and managerial skills to justify the need for their services.

2.5 ROLE OF ORGANISATIONAL THEORY IN THE HIGHER EDUCATION ODL PRACTICE

Organisational practice is informed by organisational theory. Organisational factors which impact on the role and responsibilities of management are the size of the organisation, organisational structure and scope of activities, which also apply to libraries. The discussion that follows is a further response to the first research question (sub-question 1.1).

2.5.1 Role of management in large versus small libraries

The respective roles of general management, middle managers, first-line managers and departmental managers will be impacted by the size of the ODL Library. In accordance with management principles, the role of management in a small versus a large ODL Library will be determined by the number of levels in the respective organisations.

Hellriegel et al. (2012:13) indicate that in large organisations with more than one level of management, managers are responsible for different types of tasks. They focus on coordinating employee activities, decide which products or services should be provided and how they should market these. Middle managers receive broad strategies from general managers at the top and then translate them into specific goals and plans for first-line management to implement (Hellriegel et al. 2012:13). All these managers are typically responsible for the efforts of a group of people who share a goal and access to resources that can be used to obtain the goal (Hellriegel et al. 2012:8).

In a small library one person may be responsible for all the tasks performed on three levels of management in a large library. This person performs the role of the top manager and will, for example, create community relations; perform the role of middle manager as the person co-ordinates all aspects to ensure quality; and the role of first-line manager as the person supervises, for example, the marketing and administration of the library.

Hellriegel et al. (2012:10) report on the importance of managerial roles, identified by Henry Mintzberg (1973), and how they differ in small firms versus large firms:

In a large organisation the decisional role, with a focus on resource allocation, is of high importance whereas the informational role, with a focus on being a spokesperson, is of high importance in a small organisation. In large organisations the decisional role, with a focus on negotiator and disturbance handler, and interpersonal role, with a focus on

liaison, is of moderate importance whereas the decisional role, with a focus on entrepreneur, and interpersonal role, with a focus on figurehead, and leader role are of moderate importance in a small organisation. In large organisations the decisional role, with a focus on entrepreneur, is of low importance whereas the informational role of disseminator is of low importance in a small organisation.

In addition to the differences between small and large businesses discussed above, it is further noted by Hellriegel et al. (2012:12) that

‘the level of formality in the execution of managerial tasks in small businesses is less formal, organisational designs are less complex, planning systems less sophisticated and controlling of tasks are through motivation rather than formal systems such as computerised management information systems used by big businesses’.

Required competencies also relate to the position of the manager in the hierarchy which is established in terms of the size of the library. General managers responsible for operations of a more complex unit based on its size, for example, a business enterprise, have a broad range of competencies as they deal with the activities of top management while also engaging in other management activities and oversee the work of the functional managers (Hellriegel et al. 2013:10-13). Managers then have to decide whether to draw on one set of skills in a competency or on several skills across competencies. A large ODL Library would thus require a variety of competencies from its managers depending on their position in the hierarchy.

2.5.2 Impact of the organisational structure

Hellriegel et al. (2012:111,119) allude to the fact that, in accordance with the traditional viewpoint, this school of thought fosters an understanding of what managers do and the manager’s role in the hierarchical structure. This viewpoint still applies to the contemporary organisation and the position and subsequent role of the manager in the organisational structure. The theory focuses on the strong relationship between expertise and organisational level, namely superiors in the structure are obeyed by subordinates because of their higher position and most probably greater expertise.

Organisational structure, however, depends on the size of the business. The number of employees and managers to be coordinated impacts on the design as an increase in the size of the business creates a need for greater specialisation, more departments and more

levels of management. It also depends on the staff employed by the business as there is a close relationship between organisational structure and the competence and role of staff, regardless of whether the competence was obtained through training, experience, availability or attitude (Hellriegel et al. 2012:13). Of all the ideas of various 'Scientific Management' pioneers noted in the literature, those of Brech (1965) need specific mention as his contribution is very influential, particularly in management training and development. Key issues in structure formation indicated by Brech which are quoted by Cole and Kelly (2011:34) are those defining the responsibilities of management, supervisors and specialists; determining the delegation of responsibilities; coordinating the execution of responsibilities and the management of morale.

Stewart (1991:20) points out that there is not one, but there are three categories of management. Hellriegel et al. (2012:13) support this fact and state that in a large organisation, there are typically four layers of staff, of which three pertain to management. These layers are:

- Non-management doing operational work.
- First-line management, also referred to as lower management or supervisory management, responsible for subsections in a department and the production of goods or services. With regard to planning, lower level managers have a different focus, namely they use tactical goals and tactical plans to develop short-term operational goals and operational plans for their sections (Hellriegel et al. (2012:9). The most important difference between first-line managers and middle managers is that more emphasis is placed by first-line managers on managing group performance and allocating resources.
- Middle managers who often commence their career as first-line managers. They are responsible for directing and coordinating the activities of first-line management and at times also that of non-managerial staff. Cronje et al. (2007:127) explain that this middle management layer is accountable for executing policies, plans and strategies determined by top management and it monitors environmental influences that may affect its sphere of operations. Middle managers are typically often involved in setting priorities, reviewing work plans and coordinating activities; setting targets, developing evaluation criteria, allocating money to projects, personnel and translating top management goals into operational plans. Middle managers often attend meetings, prepare reports and develop their sub-ordinates (Cronje et al. 2007:39). The four managerial activities are noticeably being performed at the middle management and first-line management levels. Collectively, the first-line management and middle management groups can be referred to as Library

middle management.

- Top Management responsible for the overall direction of an organisation. Cronje et al. (2007:39) allude to the fact that the general management function coordinates the other management levels from the top level of the organisation. High-level executives are therefore referred to as top management with middle management reporting to them. Within the planning process, the top level managers formulate long-term strategic goals and plans for the entire Library. Typically, in a large ODL Library with five tier management structure, they would be the Executive Director, Directors and Assistant Directors.

Top level managers and middle level managers use the strategic goals and strategic plans as inputs to develop medium-term tactical goals and tactical plans for the functional department. Tactical plans and goals focus on tasks to achieve strategic goals (Hellriegel et al. 2012:9). The interpersonal role is linked to the specific role of figurehead, leader and liaison. In the execution of this role the manager typically performs ceremonial and symbolic duties when representing the organisation, directs and co-ordinates activities which may involve motivating employees, involves other managers outside the person's area of command and interacts with numerous other managers and individuals.

The informational role is linked to the specific role of monitor, disseminator and spokesperson. In the execution of this role the manager typically evaluates the performance of managers in different activities, takes corrective action to improve performance, monitors change in the external and internal environment and informs employees about changes, communicates the vision and purpose to employees and represents the unit to other people, either inside or outside the organisation.

The role of ODL Library middle managers can be considered against these findings, because the role of all managers is most frequently coupled with this study. These three roles also align with the management tasks identified by Nienaber (2010:666-667).

2.5.3 Impact of managerial layers

The respective managerial layers impact on the management roles within these layers. First-line management primarily leads; middle managers mostly lead and organise; and top managers organise and plan (Hellriegel et al. 2012:12). The most important difference between top management and middle management is that top managers provide the overall direction of an organisation and develop goals and policies; over 75% of the day is

spent on planning and leading (Hellriegel et al. 2013:12).

Hellriegel et al. (2012:12) state that the difference between the respective management layers also lies in the proportion of time spent on two managerial activities, namely planning and organising, as this increases as they move up in the organisation. The proportion of their time spent on directly leading the people under them then decreases. Although all managers perform the same tasks and should have a thorough knowledge of the management process, the amount of time spent on each relates to the position of the particular job within the respective layers in the hierarchy (Cronje et al. 2007:128; Hellriegel et al. 2012:12).

2.5.4 Impact of the scope of activities

The difference in the scope of activities that are being performed within the respective managerial positions and the impact thereof on the respective management roles needs consideration. The difference between the managerial positions lies primarily in the scope of activities being performed, for example, those of general management are very broad opposed to the narrow scope of activities of functional management (Cronje et al. 2007:128; Hellriegel et al. 2013:12-13).

A comparison between the two roles indicates that functional managers supervise employees with expertise in one area. These managers have much experience and technical expertise in the area of operation that is being supervised and their success lies in detailed knowledge. They are responsible for the management activities of their area (Cronje et al. 2007:128).

Based on the findings on how structure, layers and scope of activities influence the role of managers, it can be concluded that the role of middle management is thus determined in terms of the manager's position in the hierarchical structure of a large library, the size of the organisation as this informs the importance of the roles to be performed on the respective levels, and the managerial function of each. Cole and Kelly (2011:13) further conclude that in each of these situations, the respective managers will have to learn what it means to be a manager at that level; how to improve the ability to judge others when work-related tasks are delegated; learning to understand more about own capacities and weaknesses, and learning how to cope with stress. They will also have to consider the required competencies in order to perform the relevant tasks and role.

2.5.5 Management skills

Cronje et al. (2007:129), Daft and Marcic (2009:10) and Hellriegel et al. (2012:20) state that different personal skills are required to perform on the different management levels of an organisation. Within an organisation, three key skills are required to ensure sound management, namely conceptual skills, interpersonal (human) skills and technical skills.

Cronje et al. (2007:145) and Hellriegel et al. (2012:20) explain that conceptual skills are required as these relate to the manager's thinking and planning abilities while viewing the business and its parts in a holistic manner. As managers move up the managerial hierarchy, the number of complicated problems with long-term consequences they deal with increases and these skills are therefore important for top managers. Skills pertaining to the formulation of the mission of the business and the subsequent overall long-term or strategic goals are required from the top management layer (Cronje et al. 2007:146; Hellriegel et al. 2012:20).

One to three year tactical or functional goals are accomplished by the middle management level (Cronje et al. 2007:146). As these goals focus on how to carry out the tasks through staff reporting to the middle management level to achieve the strategic goals, middle management requires human skills. Human skills pertain to the ability to work with people, namely communicate with and motivate groups and individuals (Cronje et al. 2007:130). In accordance with the definition of Floyd and Wooldridge (1996:111), first-line management and managers are mainly operating on those levels. Hellriegel et al. (2012:20) argue that in order to get the work done through other people, this skill is of importance to any managerial level. As this skill impacts on staff retention, all managers need to anticipate and respond to employee needs (Hellriegel et al. 2012:20). Cooper (2005) supports the views of Gooding (2005) by stating that these factors relate to: workplace balance whereby a balance between working lives and personal lives is established; staff involvement which leads employees to understand the 'why' and 'what' in duties to be performed; incentives as a reward culture accelerate in an environment with pressures to perform; meaning of the job whereby staff identify with the values of the organisation; a healthy workforce as workplace stress is dealt with in a professional and orderly environment, characterised as friendly and caring (Hellriegel et al. 2012:20-21).

Technical skills pertain to the ability to use the knowledge or techniques of a particular discipline (Cronje et al. 2007:130; Hellriegel et al. 2012:21). The time spent on technical

activities decreases proportionally as managers move up in the organisational hierarchy. Conceptual and analytical skills then become more important on the higher management levels (Cronje et al. (2007:129).

Robbins and DeCento (2008:6) add to these three skills a skill which relates to the ability to enhance one's position, build a power base and establish the right connections which all contribute positively towards obtaining resources and being acknowledged for promotion in the workplace. Hellriegel et al. (2012:21) acknowledge qualities of successful managers as part of political skills, such as clear direction and standards for people, open communication that reflects honesty, coaching and people support which reflect helpfulness.

Although the importance of the skills relates particularly to the level on which the manager performs, on the middle managerial level all four of the skills identified above are relevant to some extent as a result of this staff category's midway position between top and lower level management. McGurk (2009:465) states that this position affords them the critical role whereby they interpret and frame strategic objectives for front-line staff and therefore require a balance between management and leadership skills.

The background in information pertaining to management skills, is a confirmation of the view of Kirk (2004:35) who states that management theories have undergone fundamental changes away from the one-dimensional management theories which only focused on classical functions of management. Contingency theory suggests that academic library managers must look at their own combination of people, tasks, technology, structure and environment, that there should be congruence between the five elements and that management should align an organisation's structure with its operating environment in order to maximise efficiency and effectiveness. An overview of the ODL environment and the impact thereof on the institution's academic library is reflected in the following discussion.

2.6 IMPACT OF ODL ON THE ACADEMIC LIBRARY

This discussion is a response to Research question 1 (sub-question 1.4) which relates to why an ODL Library differs from a residential academic library.

Since the ODL research site of this study resides in South Africa, an understanding of the ODL environment is interpreted in terms of the change experienced in the South African

higher education landscape approximately a decade ago. A very specific distinction is noted between residential universities and the comprehensive ODL institution since the inception of the ODL institution in South Africa. Talesra (2004:34) explained the ODL field as one of the most rapidly growing fields of education and training in the world. The impact of ODL on education delivery systems has been accentuated through new developments in information and communication technologies which free learners from time and space. This leads to benefits of increased access and flexibility as well as work and education at the same time. It may mean enrichment, improved quality and a learner-centred approach, with the possibility of a new way of interaction. This leads to cost-effective development and learning in the workplace and allows for upgrading of skills, increased productivity and a new learning culture (Talesra 2004:35). Talesra (2004:38) further alludes to the importance of adequate resources to respond to new demands, including staff with the required competencies and understanding of the varied use of learning materials as well as ODL cost structures, quite different from cost structures of conventional types of education where the institution depends on economy of scale (Talesra 2004:40).

Henning (2010:441) ascribes the difference between a residential academic institution and an ODL institution to the fact that the latter chooses to combine the characteristics of distance education, which represents a mode of instruction, and the approach of open learning into open distance learning. Through the ODL mode of education, many persons within the library's client profile may reside in geographical areas far away from the ODL institution. An examination of factors that distinguish the ODL Library from a residential Library indicates different characteristics as follows.

2.6.1 ODL Library versus the academic residential university library

An examination of the difference between an ODL Library environment and an academic residential library environment is demonstrated by the details pertaining to the ODL concept as interpreted by the leading ODL institution in South Africa. Resources consulted in this regard indicate that the difference lies primarily within the aim of the ODL concept, its student-centered approach, ODL capacity development, the ODL role definition and the application of ODL guidelines and standards for effective service delivery. An examination of the institution's strategic plan and ODL Library strategic plan, which aligns with that of the University, indicates a strong focus on ODL. These aspects are discussed to illustrate the nature of the ODL Library, its subsequent distinction from the residential university library and why ODL middle managers need to be developed in this regard.

- **Aim of the ODL concept:** The ODL definition, as stated in the Unisa ODL policy (University of South Africa 2008:2), summarises the aim of the concept and provides an understanding of the ODL service focus, which distinguishes it from a residential university. It explains that ODL is a multi-dimensional concept aimed at bridging the time, geographical, economic, social, educational and communication distance between student and institution, student and academics, student and courseware, and student and peers. ODL focuses on removing barriers to access learning, flexibility of learning provision, student-centeredness, supporting students and constructing learning programmes with the expectation that students can succeed (University of South Africa 2008:2).
- **Student-centeredness:** In terms of the ODL student-centered approach, Henning (2010:440) explains that ODL applies a set of methods or processes for teaching a diverse range of students located at different places and physically separated from the learning institution, their tutors, teachers and other students. This student-centered approach within the ODL model led to the establishment of integrated systems and engaged learning, in addition to well-designed study packages and relevant learner support (Henning 2010:440-441). In the case of the Library, it has, for example, an online interactive training model available to all clients and an online Request service linked to its Online Public Access Catalogue (OPAC) to serve all clients residing in various parts of the world, too far away to visit the various Unisa libraries at regional offices.
- **Staff capacity:** In terms of this ODL policy, human resource provision, capacity development and the university identity is reflected in roles to be performed. The policy states that the University employs sufficient staff to ensure consistent and quality service to the students (University of South Africa 2008:8). In this regard, the ODL Library has 260 staff positions of which middle management occupy approximately 20% (Unisa Library 2015e). Staff capacity is established in support of consistent and quality ODL services. This pertains to equitable service delivery to both those clients who cannot visit the Unisa libraries and those who are able to visit the Unisa libraries. In terms of the institutional identity, for those who cannot visit the libraries, the transactional gap is filled through the use of technology which ensures access to information, alternative service delivery through service broadcasting and the aid of delivery services to speed up the delivery of printed material by courier services, and through the setting of relevant service objectives which can only be met through appropriate performance measures aimed at timely, immediate service delivery; or in the case of students who are physically challenged, assistive technology which is available to support these students to ensure that they

receive the same learning experience as those who are not physically challenged. In order to develop ODL research, middle management must also advise the educators on new course material, research and scholarship in distance education.

The ODL policy further states that the purpose of capacity development in the Unisa ODL environment has an awareness focus in the short-term and in the long-term a programme of continual renewal to develop, inter alia, ODL capacities of academic and support employees (University of South Africa 2008:8). Library middle management forms part of the support employees and ODL capacities should be developed in the long-term as part of the person's career path.

- **ODL role definition:** The ODL role definition relates to the University's social mandate, namely to provide access to a wide range of students with the correct support to ensure that access becomes an opportunity for success (University of South Africa 2008:9). In order to meet this objective, the ODL policy states that the University collaborates with distance education institutions in South Africa, Africa and internationally to ensure opportunities for the Unisa community. The response of the ODL Library in South Africa is reflected in the establishment of extensive branch library services worldwide, an Info Hub in the main library which was established for clients who cannot visit the Unisa libraries, as well as web-based library services (Unisa Library 2009:8). This requires an understanding of serving clients in a virtual environment and living the new social and learning interactions, and the concept that an ODL Library is about people, learning, scholarship and research rather than information resources. This indicates, in particular, the difference in nature between an ODL institution and a residential university as there is a strong focus on the global awareness competency to be considered when developing ODL Library middle management.

- **ODL service guidelines and standards:** Another significant difference between an ODL Library and a residential library lies within the ODL Library's adherence to guidelines and standards for ODL Library services which were developed since the 1960's by various library associations. Henning (2010:443) states that these were developed since library associations also acknowledged the fact that there is a difference between a library in a residential university and those in support of distance education. The aim of these guidelines is to ensure that equal library and information services can be provided to non-residential clients of institutions providing distance education, regardless of geographical location. Direct communication with library staff must therefore be possible in the preferred

format of the client, regardless of the location of the staff or client.

The guidelines which were developed in 2009 by the Committee of Distance Learning of the Association of College and Research Libraries (ACRL) have since been reviewed continuously. They were developed into standards which apply to all categories of distance learners. The requirement of management for distance libraries specify activities to be undertaken by dedicated librarian administrators or dispersed between a number of librarians. In the case of this ODL Library, only dedicated distance education library services are provided, implying that the management, resources and services of the library are totally assigned to distance education library services (Henning 2010:443).

The Unisa Library (2014b:1) guideline on ODL Library services indicates that the Library as a support service to the ODL institution leans on three pillars, which provide access to information, broadcasting of information and the use of technologies for the delivery of services.

- **ODL strategic goals:** An assessment of the relevant ODL Library's strategic plan for 2015 indicates an alignment with the institution's 2015 strategic plan in terms of the institution's goals and strategies. This includes, most importantly, its ODL educational strategy. In the ODL Library's strategic document the goals and strategies of the library align with the Unisa 2015 - Revisited plan. In this context, and within the more specific context of developments in the library business and the services of the Unisa Library in particular, the strategic plan has been developed and defines the goals of the Library and the implementation strategies, with their targets and standards.

Kanter (2004:150) alludes to the fact that middle management plays a significant role in terms of innovation and development. They are the implementers of the strategic plans of the Library. Innovation and change are closely related although they are not the same (Cronje et al. 2007:354). The three forms of innovation identified by Cronje et al. (2007:354), which apply to the ODL Library, are technical innovation (creation of new ODL products and services), process innovation (creation of a new means of producing, selling or distributing an existing ODL product) and administrative innovation (creation of a new organisational design which better supports the creation, production and delivery of ODL products and services). Innovation and change should be built into the organisation's ways of doing things through the establishment of a learning organisation (Cronje et al. 2007:355).

Middle management therefore require skills to control people and resources to implement business plans and work effectively with staff to implement strategic changes, both changes that are driven from the top and those initiated from below. This relates to the modern approaches to management theory where the focus is on practicing managers who develop a strategic mission to ensure effectiveness. Adequate leadership capacity on the middle manager level is therefore important. The ODL Library acknowledges this as part of the career development of managers, since the development practice is managed in accordance with the staff member's personal development plan (Unisa Library, 2015c). Content of personal development plans (Unisa Library, 2015c), which were submitted to the Human resources department in 2015, engages the ODL Library's employees in continual learning and acquisition of skills in accordance with the institution's human resources training policy (University of South Africa. Department of Human Resources 2014a:1). This relates to development strategies typically implemented by institutions to determine development needs through performance appraisal integrated with a strategic and integrated approach, namely talent management (Cole and Kelly 2011:489); 360 degree assessments whereby feedback from stakeholders is required (Cole and Kelly 2011:492); management development (Cole and Kelly 2011:503); guided experience namely coaching; continuing professional development including a personal development plan; networking strategies and succession planning, a process through which senior level openings are planned for and filled.

2.7 PARADIGM SHIFT IN MANAGEMENT AND RELATED LIBRARY SCIENCE

The paradigm shift in the debate on management and administration of businesses towards organisation, also affect libraries which operate as a business. Glazier and Grover (2002) allude to the fact that a paradigm shift relates to the worldviews of those that develop them. In the case of paradigms in management, the categorised management theories of Cole and Kelly (2011) represent the worldviews within the respective paradigms. As the worldviews evolved, a shift in emphasis within each paradigm is noted.

Since this study pertains to the contemporary ODL Library, which operates in the knowledge economy, development of contemporary ODL Library middle managers relates strongly to the most current viewpoint, namely the Principle-led viewpoint. Hellriegel et al. (2012:125-128) state that this viewpoint not only acknowledges knowledge management (KM) but also the importance of both task and people effectiveness flowing from the managerial lessons learnt from the seven major management theories, identified as

important by Cronje et al. (2007:134) and Hellriegel et al. (2012:104) and discussed in section 2.3.3 of this study. These are the traditional, behavioural, systems, contingency, quality, flexible and principle-led viewpoint. It places moral and ethical issues central to the business operation to ensure effectiveness. It addresses the concerns of Mumford (1986:24), who alluded more than two decades ago that management processes should be acknowledged when developing managers. It acknowledges the reality of managerial behaviour, the reality of perceptions and understanding of managers themselves. It is therefore important to ensure that managers have the knowledge and skills to get things done effectively and efficiently and that the management role and acquired competencies relate to these matters. The main concepts reflected in this management theory differ from those in other viewpoints.

An investigation into KM as a significant concept in support of effectiveness led to a consideration of elements within acknowledged KM management competencies identified by Nazim and Mukherjee (2013). The research findings of Nazim and Mukherjee (2013) revealed that respondents were of the opinion that development in the field of 'management' by LIS professionals is most essential for the effective application of KM. The respective dimensions of the management competencies identified by Hellriegel, Jackson, Slocum, Staude, Amos, Klopper, Louw, and Oosthuizen (2012) should form part of such development. Hellriegel et al. (2012:127) explain that with regard to career path development this shift in focus will result in careers to be much different in future.

On the LIS front, Golden (2006:174) alludes to the fact that careers of library middle managers have changed. This can be ascribed to the fact that the nature of their work relates to changes in the management world. Golden (2006:176) indicates that the change relates to both the demand for efficiency of managers as the focus is much on the consumer and effectiveness required by the changing library workplace as managers have to lead the library into its future position. There is also a shift in the approach to career development from organisational learning processes to additional leadership development strategies. This need is caused by a few facts, namely the erosion of leadership stability as the baby boomers are leaving the workplace, the perception that there is a shortage of managers with strong leadership capabilities, not only in libraries but in most organisations, the impact of technological change which leads to a shift in responsibility for decisions, as well as the fact that there is no program to identify managerial leadership candidates that can be developed through stronger programmes (Golden 2006:176). As this trend is still continuing, middle level managers subsequently need to restructure their

own career path if they intent to advance. As traditional career models with an almost automatic growth in the management hierarchy have been superseded, managers have to find new methods of professional advancement with diversified skills and or additional professional qualifications to make themselves marketable.

Golden (2006:174) states that in order to strengthen and expand the management pool, stronger methods of effective training and development are required in addition to leadership skills emphasised by graduate schools of business and formal library education courses. This shift in the management environment applies also to libraries. Glazier and Grover (2002) state that concepts relating to library science reflect the shift in the discipline they stem from.

Golden (2006:173-174) therefore advises that the profession needs to explore the combination of career strategies that create the best pathway in libraries in order to ensure that the necessary capacity can be built. This includes programmes to identify potential leaders and indicators to assist potential leaders in determining the methods to use in pursuing a potential career path (Katz and Salaway (2004); Golden 2006:174). In all these cases, libraries recognise the need for career professional development strategies that are effective. This would assist individuals who aspire to move into a more senior position within the library's management structure (Golden 2006:176).

2.8 LIBRARY STUDIES ON MANAGEMENT DEVELOPMENT STRATEGIES AND FACTORS

In order to find LIS studies in support of the problem statement of this study, the review of the literature was focused on career paths of middle managers, development strategies impacting on career success and context for ODL Library middle managers. These areas relate to management in libraries.

Since the 1980's library management became an important area of study of LIS. It is distinct from the traditional concern that related mostly to information seeking. The change can be ascribed to the fact that management had to motivate people to work together and implement the libraries' mission and objectives. Trosow (2000:129-137) indicates that management studies in LIS often related to the role of management theory in management practices, including LIS management with a focus on personnel practices, budgeting and finance, collection development, automation management, strategic planning and evaluation of library services. Trosow (2000:130-137) points out core texts, traditionally

used in LIS management and administration are the works of Evans (1983) on management techniques for librarians; McClure and Samuels (1985) on concepts and approaches relating to strategies in library administration; Rizzo (1986) on fundamentals and issues in the field of management for librarians; a basic reader of Lynch (1986) on management strategies; and Stueart and Moran (2000) on library and information center management. All of these relate to some extent to library managers career development, but it is Stueart and Moran (2000) who pointed out that twenty-first-century organisations require broadening of skills and talents to lead new types of organisations. This was followed by a question raised by Golden (2006) in the form of a problem statement:

‘What combination of career development strategies creates the best career pathway for public library middle managers?’

In terms of the research question of this study, studies of credible, known library practitioners and leading consultants in the library leadership and management fields were examined. Since the studies of Golden (2006) and McGurk (2009) relate to strategies that influence career path development, these were considered. The study of Golden (2006) was examined with a view to consider development factors and strategies that were tested in a public library so that concepts derived from the study could be re-tested in the ODL Library environment. The study of McGurk (2009) was examined with a view to consider development factors pertaining to the development of library middle managers to see how they relate to the development strategies identified by Golden (2006).

Both these studies have a sound foundation as the study of Golden (2006) was based on studies on this topic which involved information professionals or managers. These are the studies of Greiner (1985) and Farmer and Campbell (1998), as well as studies which pertain to development factors and strategies that influence career success. McGurk’s study (2009) is based on the study of Day (2001), who modeled leader and leadership development of middle managers. Since leading is considered to be such an important activity to be performed within the role of the contemporary manager, concepts within these studies applied to the research question of this study.

2.8.1 Development strategies

Golden (2006:177) considered management development strategies as she alluded to the fact that ‘there is little agreement about which set or combination of career development strategies creates the best pathway for middle level leader/managers’, yet so much is

expected of them. Golden (2006:182) states that the literature suggests actions that will ensure high-quality, leading managers. She considers career development strategies as external factors over which the relevant person to apply them has some control.

Her study relies on three development strategies similar to strategies identified by Farmer and Campbell (1998), namely professional strategies, organisational strategies (carried out by or within the organisation) and educational strategies (formal learning and training).

Golden (2006) adopted the following six career professional development strategies identified by Farmer and Campbell (1998):

- professional involvement
- recognising/taking opportunities
- mentoring
- experience
- qualifications
- networking

Golden (2006) then added three strategies to these, namely

- career planning
- training and development
- continuing education.

The extended strategies relate to additional selected studies as discussed in the literature (Golden 2006:180).

The career development model of McGurk (2009:466) is based on management and leadership skills to control people and resources, coaching on how to implement business plans and develop the ability to reflect on experience and relationships with others to deliver strategic changes. This model is based on the research of Day (2001:582), which was conducted to consider how state-of-the-art development should be done in the context of ongoing organisational work (practice context). It includes both management and leadership development and makes a distinction between management development, leader development and leadership development. McGurk (2009:466) states that both the categorisation suggested by Day (2001) and the typology developed from the literature to include hypothetical outcomes of different interventions for middle management on individual and organisational levels are helpful. The model addresses an old question

which was often asked, namely whether managers and leaders are different (Zaleznik:67-68).

The model acknowledges four development strategies which are key to management and leadership development, namely a professional development strategy, essentially about qualifications; management development strategy, essentially about cognitive skills of coordination and control to be developed through managerial education and training (Day 2001:582; McGurk 2009:465); leader development strategy focused on the intrapersonal competence needed to have awareness of the self and to develop the individual's personal power, knowledge and trustworthiness. The emphasis is on individual-based knowledge and investment of individual capital (Day 2001:584; McGurk 2009:466); and lastly leadership development focused on the person's inter-relational competence with regard to commitments, mutual respect and trust with emphasis on investment in social capital and the building of networked relationships that enhance cooperation and resource exchange (Day 2001:582; 584; and McGurk 2009:467).

For the purpose of selecting development strategies applicable to the ODL Library, the strategies selected by Golden (2006) and McGurk (2009) were listed in accordance with the expected outcomes identified by McGurk (2009). This combined list indicates strategies identified in the two studies. A comparison between these strategies identified by Golden (2006) and strategies identified by Day (2001) indicates a strong resemblance. Table 4 depicts the resemblance. The strategies taken from Golden's list (2011) that correlate with the strategies of Day (2001) are indicated in brackets in Golden's list.

Table 4: Comparison of development strategies identified by Golden (2006) and McGurk (2009)

Training intervention Golden (2006) and McGurk (2009)	Additional strategy	Competence	Individual outcomes	HR outcomes	Organisational outcomes
Professional/vocational training <ul style="list-style-type: none"> • Qualifications • [Experience] 	-	Technical	Professional credibility	Staff compliance	Continuity of effective service for customers
Management training <ul style="list-style-type: none"> • Management training and development • Continuing education through learning programmes 	-	Managerial	Managerial control	Staff compliance	Continuity of effective service for customers
Leader development <ul style="list-style-type: none"> • [Career planning] • 360 degree feedback • 1-1 coaching and mentoring • Personal development plans 	-	Intra-personal	Reflective practice	Staff commitment	Effective strategic change
Leadership development <ul style="list-style-type: none"> • [Professional involvement] • Networks • Special projects • Action-learning sets (for example, opportunities to participate in secondary leadership roles) • Talent management 	Talent Management	Inter-personal	Collective contribution to strategic change	Staff commitment	Effective strategic change
					

2.8.2 Career development strategies in the ODL Library environment

Training interventions identified by Golden (2006) and McGurk (2009) are also development interventions used by the ODL Library. As part of the ODL institution's key strategic

imperatives, the objective of an imperative relating to people is to implement a Talent Management plan to attract new staff and retain existing staff. The institutional document on talent management revealed that as South Africa's single dedicated ODL institution, the institution requires a competent and motivated workforce to deliver on its extensive educational and social mandate as set out in its strategic plan. The University's unique ODL model requires specialised educational capacity and capabilities. It is therefore a challenge to attract and retain staff with such capabilities (University of South Africa. Department of Human Resources 2014b:7).

In terms of who is responsible for this policy implementation, it is stated that the process will be championed by senior management but facilitated by line managers. Employees should receive development opportunities based on merit and potential and performance needs. It would be measured against criteria for development and advancement (University of South Africa 2014c:3). It is further stated that line managers are responsible for collaborating with the Department of Human resources on implementing the integrated talent management strategy in their respective departments (University of South Africa 2014c:5). Employees are responsible for, inter alia, supporting and engaging in performance improvement, having insight into the job profile and level of competencies, take responsibility for own career growth and engaging the line manager, realising the developmental areas, career aspirations and motivation levels, improve the range of learning opportunities, have clarity about what is required to move from one career stage to the next, compete when career advancement opportunities arise and participate in self-directed career development (University of South Africa 2014c:6). The details provided in this paragraph are a further response to Research question 2 (sub-question 2.1).

The talent management process is applicable to all employees who are employed permanently at the institution or fixed term contract of not less than twelve months. The relevant Talent Management Policy is intended to ensure business continuity, the enhancement of the institution's operations through capable employees who remain at the leading edge of their profession, ensure that students and stakeholders benefit from high quality service rendered by competent professionals encourage employee engagement and subsequent rising of moral and also providing developmental opportunities to all employees. Through a talent management programme the institution can attract, develop and retain employees with the appropriate knowledge and skills and mind sets to contribute to the institution's success and sustainability. As part of the institution's definition on talent management, it is accentuated that employees must be able to

achieving the institution's strategic objectives and to create a high performing vibrant and sustainable organisation (University of South Africa 2014c:7). It is stated that the institution's talent management leans on four pillars- namely talent attraction, talent development, talent deployment and talent retention. Since this study pertains to development, the document was merely examined in this regard. This refers to the development of employees to enhance a sustainable high performance organisation. Talent management also contributes to the employee's satisfaction and subsequently feeds job retention which contributes to the organisation's competitive advantage (University of South Africa 2014b:9).

As part of the Talent management Plan, the following career development strategies are implemented:

Coaching - relates to one-on-one developmental discussions. It involves helping a person with awareness. It focuses on improving performance and developing individual's skills (University of South Africa 2014b:44).

Mentoring - refers to a developmental partnership through which a person shares knowledge, skills, information and perspective to foster the personal growth of someone else. Examples are job-shadowing, allocation of a mentor, secondment opportunities, career discussion and planning, opportunity to mentor others (University of South Africa 2014b:45). The mentoring needs of all Individuals' should be assessed. A high professional mentor programme is created to build capacity and competence (University of South Africa 2014b:17).

Career conversations - refer to a discussion between an employee and the line manager pertinent to the career aspirations of employees (University of South Africa 2014b:45).

Management and Leadership development - as part of the career discussion, a person indicates that the person has an interest in a leadership position. Leadership development activities are identified to create exposure (University of South Africa 2014b:47).

In 2010 the institution developed a management and leadership strategy (University of South Africa. Department of Human Resources, 2010a). Examples of Management and Leadership development programmes mentioned in the institutional document are:

Building tomorrow's leaders, supervisory skills, project management, change management, diversity management, ODL related training, including IT training.

Succession planning - this applies to a profile critical position. Successors are identified in terms of data collected from a workforce analysis process ((University of South Africa 2014b:17).

360 degree assessment - a practice implemented to assess the behaviour of senior management (Director level and higher).

Successful use of career development strategies - the university of South Africa's Training policy indicates support for developmental career strategies and is clear on how the strategies should be assessed upon return after the intervention, namely development opportunities should commensurate with performance (University of South Africa. Department of Human Resources 2014c:7; 8).

This concludes the section on development strategies that lead to career success. This information gained serves as a response to Research question 2 (sub-question 2.5).

2.8.3 Development factors

There are many elements in the literature that can be considered as possible influences on career success. This part of the study focuses therefore on selected development factors as facilitators of career success. These factors serve as a response to Research question 3 (sub-questions 3.1-3.3).

Farmer and Campbell (1998) classified internal factors as ability; flexibility; communication; determination, pro-activity; hard work; personality; intelligence and enjoyment as aspects innate or developed, that might affect career success. External factors which influence career success as aspects over which people have little control are luck/serendipity, gender, family support, age, and geographic mobility.

Golden (2006) considered important development factors, based on the findings of Farmer and Campbell (1998), as part of her concern that there is little or no agreement about the influences on the best pathway for middle-level leader/managers. Golden (2006) adopted some developmental factors which were rated high in terms of their influence on career success in two primary studies by Farmer and Campbell (1998) and Greiner (1985) respectively, and then extended these for research conducted on Library middle managers in a public library environment. These factors identified by Golden (2006) were also examined for this study together with factors identified in a more recent study of the

literature, conducted by Stavrou (2011:1). The factors identified by Stavrou (2011:1) are factors that influenced the career success of women holding key positions. These factors were selected to be examined in this study as most middle managers in South African libraries are women.

Stavrou (2011:2) identified factors that lead to success and grouped them as psychological factors, environmental factors, individual factors, emotional factors and organisational factors. Psychological factors pertain to dedication, tenacity, self-confidence and assertiveness. Environmental factors include family and enjoyment. Individual factors pertain to how studious, hardworking, able, resourceful, talented and ambitious the person is. Emotional factors point at the individual as team player and how altruistic the person is. Organisational factors refer to the person's ability to guide, motivate and co-ordinate (Stavrou 2011:2). For the purpose of selecting development factors applicable to the ODL Library, the factors selected by Golden (2006) and Stavrou (2011) were listed. This combined list indicates how the factors identified in the two studies relate to one another.

In defining career development factors, Golden (2006:180) states that it is necessary to understand which factors that affect career success are innate or developed, which factors that influence career success are such that people do not have control over them, and which are the factors over which people do have a greater or lesser degree of control. Golden (2006) classifies the factors as follows.

- **Internal development factors**

Internal factors identified by Golden (2006:186) are ability, flexibility, communication, determination, proactivity, hard work, personality, intelligence and enjoyment. These were considered as aspects innate or developed that might impact on career success.

- **External development factors**

External factors which influence career success are those over which people have little or no control. Findings of the four external factors examined by Golden (2006:206-207) indicated that age and gender respectively do not appear to be perceived overall as being a significant influence on career success; 62% believed that luck and serendipity factored into their career development as they were at the right place at the right time or they found something accidentally; and the highest frequency rate regarding geographic mobility occurs at 1 (lowest significance). These factors were included to be examined in an ODL Library environment together with additional factors that relate to the definition of external

development factors. Family support is a factor identified by Farmer and Campbell (1998:104), which was included in this study as comments were recorded in the findings that indicated unresolved difficulties with combining a family with a successful career.

A comparison between these factors identified by Golden (2006) with factors identified by Stavrou (2011) indicates a strong resemblance. Table 5 depicts the resemblance. The factors taken from Stavrou's list (2011) that relate with the factors in Golden's list (2006) are indicated in brackets in the first column as follows.

**Table 5: Factors impacting on career success
Sources: Golden (2006); Stavrou (2011)**

Internal factors (Golden 2006)	Internal factors (Stavrou 2011)
Personality Determination (dedication/assertiveness/tenacity) Presentation (self-confidence)	Psychological factors <ul style="list-style-type: none"> • Dedication • Tenacity • Self-confidence • Assertiveness
Productivity Hard work Intelligence Proactivity (talented/resourceful) Ability (able)	Individual factors <ul style="list-style-type: none"> • Ambitious • Able • Hardworking • Studious • Talented • Resourceful
Communication (Teamwork)	Emotional factors <ul style="list-style-type: none"> • Teamwork • Altruistic
Enjoyment (Enjoyment; Family)	Environmental factors <ul style="list-style-type: none"> • Family • Enjoyment
Flexibility (Guide, motivate, coordinate)	Organisational factors <ul style="list-style-type: none"> • Guide • Motivate • Co-ordinate
Luck Serendipity Gender Age Geographic mobility Family support (Race- employment equity) (Disability- employment equity) (Social setting)	Education Gender Race Circumstantial characteristics (for example, disability) Career driven Social setting

2.9 SYNTHESIS AND EVALUATION OF THEORY

Library theories relating to middle manager development were examined to foster a conceptual understanding of factors and strategies that facilitate manager development. It was noted that critical realism theory, fuzzy set theory and the probability theory are used in library studies, most probably because the human factor is applied but that the focus is, however, on user information and use thereof and not on the librarian or library manager.

In terms of the framework adopted for this study, concepts were derived from theories that apply to library situations, the management environment and an ODL environment where the management function is performed. LIS professionals have proposed development models relevant to career success. The models contain factors and strategies that impacted on the career advancement of managers in another library type. These concepts were examined to determine if middle manager development models that were created by professionals in the LIS could be considered for application in the ODL Library environment.

Organisational theory as a management theory was examined to foster an understanding of the management concept and its business application as well as the required competencies to be acquired by successful managers. Since the thoughts about library middle management development, discussed in Chapter Two, have roots within the business sector where management is practiced, this theory was considered to be viable.

This was followed by an examination of the ODL concept as explained by the institution and authors who work in such an institution to determine how an ODL Library differs from a residential academic library.

It is important to synthesise and evaluate the theory and concepts, in terms of the characteristics applicable to evaluating theory, to consider their applications to the ODL Library. These characteristics reflect the outline of the theory, its proponents, where and how it can be applied, whether it promises prediction, how global it is, whether or not the concepts used in it are understood in the context of the discipline, how easy it is to apply and its applicability to the own research. The outcome of the evaluation is an indication of the appropriateness of the selected theory.

Having summarised ODL Library middle manager development with library science

theories in context, the state of organisational theory can be viewed as evolving and has become much more than management theory. It can be concluded that related library science theory can be used to derive concepts for this study to be investigated further. Table 6 synthesises and evaluates the applicability of theories to libraries which operate as a business. This is done with a view to investigate the application of concepts relating to middle management career development in an ODL Library situation.

Table 6: Synthesis and evaluation of library science theory

Source: Adapted from Mavodza (2010: 78-79)

Theory characteristics	Grounded theory	Probability theory	Grand unified theory	Fuzzy theory	Critical realism theory	Organisation theory
Outline	Systematic generation of theory	Applied in managing of library collections	Functions of library practices varies - work should be integrated	Mathematical origins	Socio-cultural characteristics determine Information seeking	Development of administration and management
Proponents	Glazer and Strauss (1967)	Bensman (2007)	McGrath (1995)	Zadeh (1965)	Wikgren (2005)	Fayol (1949a and 1949b) Mintzberg (1973 and 1990) Taylor (1915) Mayo (1949) Barnard (1961) Weber (1920)
Applications	User oriented studies	Inter-library loan	Acquisitions, classification and circulation	No	Human information actions	Organisation and Management applications in all library functional sections
Does it promise prediction and/or control	Yes	No	No	No	No	Yes
Is it global?	Yes	No	No	No	No	Yes
Theory characteristics	Grounded theory	Probability theory	Grand unified theory	Fuzzy theory	Critical realism theory	Organisation theory

Are the concepts used in theory well understood in library science?	Yes	Yes	Yes	No	Yes	Yes
Does it promote prediction?	Yes	No	No	No	No	Yes
Is it easy to identify its variables?	No	Yes	Yes	No	No	Yes
Is it easy to see its applicability?	Yes	Yes	No	Yes	Yes	Yes
Is it practical for my research?	No	No	No	No	No	Yes

2.10 CHAPTER SUMMARY

This summary of the literature which was reviewed serves to recap important information in resources used. According to Leedy and Ormrod (2005:80) this summary provides a description of what has been said and its importance to the research problem. In this chapter, a conceptual framework was provided in order to organise the resources in a meaningful manner. This framework was created from the literature study as a concept map to be followed stage by stage in order to establish the meaning of development and its relevance to the ODL Library middle manager situation. Coupled to the map are the expected outcomes which indicate a study of related theories. Available studies on the successful career advancement of middle managers were examined in order to select factors and strategies that influence career success, applicable to this study. This included an investigation into management thought to determine what facilitates manager success.

A study of available LIS theories was done primarily to understand the applicability of the frameworks of the studies to an environment that recognises management development as a significant way to ensure both quality services and career advancement. This provided an opportunity to identify concepts relating to this study, although the context in which the library operates is different. The findings formed a theoretical basis for factors and strategies, including competencies, to be investigated in an ODL Library environment. It also fostered an understanding of what it takes to be a good manager and how the perception of success within the workplace may differ.

The literature review also assisted in finding what methodologies and sampling procedures

had been used in the field of study and what they entailed. It also provided insight into the formulation of a research strategy. This resulted in selecting the case study method.

This chapter concludes the literature study and theoretical part of the research. It serves as background to the empirical research of this study, which deals with ODL Library middle management development issues. In summary, the entire literature study thus examined the literature on perspectives about contemporary management and its applicability to library middle managers operating in the context of an ODL Library environment. It suggests that management development is a significant issue in library management which includes topics on middle manager development. Library organisations use a variety of development strategies to facilitate organisational learning processes. It further suggests that internal and external development factors need to be understood as facilitators of career advancement. Lastly, the literature study considered the demands of the environment in which it operates and the subsequent needs to be addressed to ensure career success.

Chapter Three explains the research methodology employed for the empirical research of this study.

CHAPTER THREE: RESEARCH METHODOLOGY AND DESIGN FOR THE EMPIRICAL STUDY

3.0 INTRODUCTION

There are stages in the research process, namely defining the research problem which includes the research design, problem, literature review, theoretical questions; the stage when information is obtained; and the stage when information is analysed and interpreted (University of South Africa 2000:12). The stages characterise the transition from the problem statement to the gathering of data and are known as conceptualisation and operationalisation. Conceptualisation of this study was reflected in the conceptual framework, which is based on theory derived from a literature study, and the operationalisation took the form of empirical research to test the problem statement. The first phase in the research process was provided in Chapter Two which fostered an understanding of the concepts relating to aspects that facilitate the performance of the role of ODL middle manager and subsequently a successful career path.

Chapter Three focused on the operationalisation of the study which covered the second phase of the research process. The focus of Chapter Two was to determine the theoretical constructs whereas in Chapter Three the aim of the research was to explain a unique situation. This related to what ODL Library middle managers perceived as important factors and strategies and how and why these facilitated middle manager development and success in the ODL Library. This ultimately fostered an understanding of influences that contribute to the appointment of middle managers and an optimal career path after the appointment. The nature of the research needed to be considered as it informed the research design which becomes a plan or blueprint indicating the type of study to be conducted to resolve the research problem and it determined the methodology applicable to the study (Babbie and Mouton 2011:74, 103). The chapter commenced with an overview of this study's connection to science and meta-theoretical traditions and subsequently discussed the study's research knowledge claim, strategy of inquiry through methods of data collection and data analysis that provided the information relating to the research question.

3.1 JUSTIFICATION OF THE RESEARCH PARADIGM AND METHODOLOGY

Science is an enterprise dedicated to "finding out" (Babbie and Mouton 2011:72). This study, which falls within the field of the social sciences, focused on research in LIS since an

answer to a research problem within this field was required.

In considering the research methodology discourse for this study, an understanding of the components within the discourse was required. Ngulube (2015:126) alludes to the fact that social science methodologists sometimes use these research methodology-related terms pertaining to the components loosely, contradictorily and inconsistently. They therefore have difficulty in identifying the conceptual differences between epistemology (what constitutes knowledge and ways of knowing), ontology (existence of social reality), paradigm, methodology, research approaches and techniques in research methods.

In order to overcome this challenge in this study, the approach stipulated by Ngulube (2015:128) in a methodology discourse map was applied. It illustrated relationships among major components in the research methodology landscape. In accordance with this map social reality was linked with the related paradigm, namely realism, pluralism and constructivism. Realism pertains to positivism; pluralism to pragmatism; and constructivism to interpretivism. The broad methodological paradigms in social research, namely quantitative, qualitative and mixed method research are linked to these meta-theoretical traditions and referred to by Ngulube (2015:129) as research methodologies; and further links research designs to each of these methodologies. The quantitative methodology includes the survey, experiment and case study design; mixed method methodology includes exploratory, explanatory and embedded designs; and qualitative methodology includes case study, ethnography, phenomenology and grounded theory designs. The map further indicated the data collection techniques/ methods to be employed through the triangulation of data used by all three the methodologies. These involve questionnaires, various types of interviews, observation and artefact analysis. A strong focus is placed on all these components within the research methodology discourse. This map for researching social reality was applied to this study on developing ODL Library middle managers as it provided a clear illustration of the foundations on which social research is framed and allowed the researcher to use research methodology-related terms consistently in accordance with the map which aligns closely with the thinking of leading methodologists.

In this regard, Creswell (2003:4) alludes to the meta-theoretical traditions and states that in a research study the epistemology (theory of knowledge), theoretical perspective (philosophical stance which lies behind the methodology in questions), methodology (strategy that links methods to outcomes) and the methods (techniques and procedures) pertaining to the study should be determined. Creswell (2014:5) further states that

researchers who plan a study need to consider the study in terms of the philosophical worldview assumptions, the research design that relate to this worldview and the specific methods or procedures of research that translate the approach to practice as it reflects the meta-theoretical traditions.

Creswell (2014:5-6) states that the four worldviews that are widely accepted and discussed in the literature are postpositivism, constructivism, transformative and pragmatism. These knowledge claims, also known as paradigms, pertain to how the researcher will learn during the inquiry.

- The postpositivist assumption relates to the idea that social sciences emulate the methodology of the natural sciences. The term positivism therefore refers to scientific claims on the basis of empirical evidence (Babbie and Mouton 2011:22). Creswell (2014:7-8) explains the key assumptions of this knowledge claim as knowledge which is conjectural; research which provides the process of making claims and then refining or abandoning them; the collection of information on instruments based on measures completed by participants or recorded by the researcher with a view to provide data, evidence and rational considerations which shape knowledge; research seeks to develop relevant, true statements that can serve to explain the situation of concern or describe the causal relationship of interest; and finally, the assumption is that objectivity is an essential aspect of the enquiry, resulting in an examining of methods and conclusions that address bias, meaning that the researcher must develop methods for bias. The standards of validity and reliability also need to be considered since this is important in both quantitative and qualitative research.
- Constructivism pertains to the phenomenological (interpretivism) paradigm. Whereas positivism emphasises similarities between the object of natural and social science, the phenomenological tradition emphasises the differences between them. In this tradition, the researcher “identifies the essence” of human experiences pertaining to the phenomenon. The aim of human sciences pertains to the understanding of people (Babbie and Mouton 2011:28). Constructivism or socially constructed knowledge pertains to knowledge claimed through assumptions. Assumptions pertain to an understanding of the world in which they work and live (Creswell 2003:8; 2014:8). Constructivism is therefore a knowledge claim based on understanding; multiple participant meanings; social and historical construction and theory generation (Creswell 2003:6; 2014:8).
- Transformative worldview feels that the postpositivist assumption imposes structural

laws and theories that do not fit marginalised individuals and that the constructivist stance does not advocate for an action agenda to help marginalised people. This worldview pertains to advocacy, also known as participatory knowledge claims. Researchers in favour of the participatory paradigm believe that inquiry should be intertwined with a political agenda. Participatory paradigm is practical and collaborative and an inquiry completed with others rather than on others (Creswell 2003:9-10; 2014:9).

- Pragmatism knowledge claim arises mostly from actions, situations and consequences rather than conditions as in postpositivism. Researchers then use all methods to understand the problem (Creswell 2003:11). In this regard, Creswell (2014:11) explains that pragmatism is not committed to one philosophical system and reality; individual researchers have a freedom of choice of methods, techniques and procedures; the world is not seen as an absolute unity; truth is what works at the time; researchers look to the 'what' and 'how' to research based on intended consequences; pragmatism opens the door to multiple methods, different worldviews and assumptions as well as different forms of data collection.

Babbie and Mouton (2011:48) state that when the researcher then understands how the learning will take place, the researcher moves from the meta-scientific level to the world of actual social inquiry and begins to reflect how social scientists practice. The thoughts expressed by meta-theorists often appear in a new form. The strategy of inquiry, which informs the procedures and specific methods of data collection and subsequent analysis, then needs to be studied to determine the relationship between meta-theories and methodological approaches used in the world of social inquiry. There are broad methodological paradigms in social research, namely quantitative, qualitative and participatory action (mixed method) approaches. Each of these approaches is linked to the meta-theoretical traditions. The quantitative approach is linked to positivism, qualitative approach to phenomenology or interpretivism and participatory action approaches to the critical paradigm.

Against this background, this study fell within the paradigm of positivism, which reflected a philosophy in which the problems are examined with a view to get true statements that can serve to describe and explain the situation. The broad methodology with which this study aligns pertains to the quantitative approach. Babbie and Mouton (2011:48) allude to the fact that this paradigm includes an emphasis on certain matters, namely the quantification of constructs, which means that numbers are assigned to the perceived qualities of things; a

related topic concerns the role of variables describing and analysing human behavior; and the statistical control. This approach differs from the qualitative approach and mixed method approach in terms of the intent of the research, how literature is used, how to focus on the intention of the investigation, how to collect and analyse data, the role of the researcher and how data is validated. Imenda (2014:190) states that methodological considerations are guided by the approach followed during the literature review, nature of the data that was collected, analyses and interpretation and that these issues all touch on the broader research paradigm. The study's inductive approach to reasoning led to the development of a conceptual framework and subsequently a form of conceptual model. In terms of the study's intent to find out the perceived importance of factors and strategies that advance the ODL middle manager's appointment and optimal career path and the emphasis placed by the paradigm, the quantitative methodology could firstly provide answers to the primary intention of the study, but it would not provide a full understanding of the problem.

3.2 RESEARCH DESIGNS

The research design was further considered in terms of the study's broader research paradigm and its framework. The study's connection with the paradigm of positivism reflected a philosophy in which the problems are examined with a view to get true statements that can serve to describe and explain the situation. This together with its conceptual framework, which reflected an inductive approach to reasoning, guided the research design.

The following discussion on the research design of this study provided further details on the choice of research:

In accordance with the research methodology discourse map developed by Ngulube (2015), quantitative research designs are based around the case study, experiment and survey. This is also the view of leading methodologists like Babbie (1990:33) and Yin (2003:1). Rowley (2002:17) and Yin (2009:9) explain when to use each of these designs by stating that the decision is influenced by type of research question posed, extent of control the investigator has over the behavioral event and focus on contemporary versus historical event. In terms of the type of questions asked in case study research, the type of control required in this research study and its focus on a contemporary event, the design strategy of this study was the case study. Rowley (2002:17) states that case study research can be used for exploratory, descriptive and explanatory research. The purpose of this research

study could therefore be accommodated through this design. This research design was subsequently viewed as a blueprint for this study, which deals with the questions to study, the relevancy and collection of the data and analysis thereof according to Yin (2009:26).

3.2.1 Case study research design

This was a positivist case study which triangulates data collection methods. This approach to research arose from the need to distinguish between types of mixed methods studies highlighted by scholars such as Tashakkori and Teddlie (1998) and Tashakkori and Creswell (2007). The intention in this study was to collect quantitative data and qualitative data but to keep the data separate with no intention to mix the data as is the case in a mixed method methodology. The study focused closely on mixed methods as a collection technique of two types of data rather than a methodology. In accordance with the purpose of the study and its related research question the intention was to triangulate research methods. Both quantitative and qualitative data would be collected by means of a survey, interviews and institutional documents but the sets of data were kept apart.

In this regard, Yin (2009:19) alludes to an important fact that applied to this case study and which subsequently confirmed the correctness of the choice of design of this study, namely that case study research can include or even be limited to quantitative evidence. It is further stated that case study research is not just a form of qualitative research as it goes beyond being a type of qualitative research by using both quantitative and qualitative evidence. This argument is supported by Schwandt (2000:206), Johnson, Onwuegbuzie and Turner (2007:117) and Imenda (2014:190) who state that quantitative/qualitative data are useful since all research is interpretive in some way. Gibbert and Ruigrok (2010:712) state the data may consist of qualitative research techniques such as interviews and document analysis as well as quantitative data. This means that different research for different understandings is required and that researchers need to use a multiplicity of methods suitable for different understandings.

This aligns with the thinking of Rowley (2002:16) who states that a case study contributes towards one of the most challenging aspects of research in the workplace, namely to lift the investigation from describing 'what' happens to a research level which becomes more worthwhile. Taking up the challenge to find out more about the phenomenon added to the quantitative description. Qualitative data contributed to the completeness of quantitative data as it used evidence from additional sources. This led to the decision to approach this

research as a case study which first collected quantitative data pertaining to 'what' happens in the workplace in terms of the perceived importance of factors and strategies that contribute towards ODL Library middle manager career success and to collect qualitative data thereafter on 'how and why' development factors and strategies contributed to an optimised career path. Rowley (2002:16) alludes to the fact that 'how' and 'why' questions are the types of questions that relate to case study research as they provide certain answers. These questions are particularly applicable to this study in terms of its purpose to explain. Yin (2009:9) state that 'how and why' questions are more explanatory and likely to lead to the use of case studies. In this regard, Leedy and Ormrod (2005:108) allude to the fact that a case study has the potential to answer in-depth questions. Rowley (2002:17) explains that in comparison to survey research, the number of units studied in a case study is less than that in a survey, yet the extent of detail available benefits the study as it is greater.

The type of case study applicable to this study was a single case study in terms of the explanations for using a single case study provided by various scholars. Babbie and Mouton (2011:640) explain that case study research can be an intensive investigation of a single unit which could be individual people, families, communities, social groups, organisations and institutions, events and countries. Rowley (2002:21) states that a single case study is akin to a single experiment. Dul and Hak (2008:4) state that a single case study is a case study in which data from one instance is enough to achieve the research objective. In this study, the research focused on a single unit, namely the career paths of ODL Library middle managers and it involved all the middle managers of one ODL Library. The study was therefore viewed as a single case study of the career path of ODL Library middle managers, both as a unit of analysis and a research method, to draw data from multiple data sources through triangulation of data. Data was drawn from one instance to achieve the research objective. It also adhered to the following criteria or rationales stipulated by Rowley (2002:21) and Yin (2009:47-49) applicable when doing a single case study:

- The research represents an extreme or unique case. In the case of this study, this case was considered special since the theory with regard to ODL Library middle management development was not yet established.
- The case is a representative or typical case. In this case study, it represented a typical case on development factors and strategies which related to the middle managers in an established ODL Library.

- It is a revelatory case (case that was previously inaccessible). The fact that this case was inaccessible could be ascribed to the fact that the ODL Library's institution only became a comprehensive ODL institution approximately a decade ago; research in this field was thus not justified.

Yin (2009:50) states that if a case study examines only the global nature of an organisation or programme, a holistic design is used. This case study was subsequently considered to be a holistic, single case study as it focused on the global case of the ODL Library's middle manager career path which included different layers of managers within its organisational structure. In accordance with the criteria for the type of case designs reported and explained by Rowley (2002:21-22), this was a Type 1 holistic, single unit of analysis. Holistic studies examine the case as one unit. It focuses on broad issues which provide a 'helicopter view of the case'. It may identify a number of sub-units (such as roles), each of which is explored individually. Results are then drawn together to provide the overall picture. This case study drew from the perceptions of managers in the ODL Library's middle management structure.

Against this background, the research design pertained to a holistic, single case study which triangulated data sources.

3.3 VALIDITY, RELIABILITY AND GENERALISATION IN CASE STUDY RESEARCH

Case study research should focus on specific aspects (Becker, Dawson, Devine, Hannum, Hill, Leydens, Matuskevich, Traver and Palmquist 2005:1). According to Rowley (2002:20) validity, reliability and generalisation form the basis on which the research will be regarded as a piece of knowledge to be assimilated in the knowledge base of the field of study. The following overview of these concepts first provides a description of what they mean, followed by an explanation of how this study's validity, reliability and generalisation could be tested.

An examination of research validity reveals that it relates to the extent to which the findings of the empirical study are considered to be credible. Ngulube (2005:132) explains that it needs to be considered whether the research has measured the phenomenon in a way that reflects its characteristics. Babbie and Mouton (2011:648) allude to the fact that because ultimate validity of a measure can never be proven, researchers agree on the relative validity that reflects the accuracy in terms of certain criteria. Criteria pertaining to relative validity, provided by Babbie and Mouton (2011:122-123), are face validity

(reasonable measure of some variable); content validity (how much the measure covers a range of meanings included within the concept); criterion validity (also called predictive or concurrent validity linked to scores predicting a criterion measure; and the correlation of results with other results); construct validity (based on logical relations among variables; whether items measure concepts). In terms of these criteria, validity refers to the extent to which the empirical measure adequately reflects the real meaning of the concept under construction. The focus is thus on the extent to which a study adheres to best practice and interpretive rigour (Babbie and Mouton 2011:122).

Reliability is best described by Rowley (2002:20) and Yin (2009:45) when they explain that reliability relates to the trustworthiness of results collected from two similar studies. It demonstrates that the data collected for a specific study are the same if repeated. However, this does not mean a replication of results of one case study to another. It is accentuated that with a case study, the same case should be researched again with a view to establish the reliability of the results in the first study and to minimise errors and bias. Reliability can also be achieved through evidence of the documentation of procedures and record keeping which is later used by another investigator.

Generalisation is described by Creswell (2014:201) as the extent of applying results to new settings, people or samples. Generalisation in case studies is not statistical generalisation, but analytical generalisation in which previously developed theory is used to compare the empirical results of the case study. In analytical generalisation each case is viewed as an experiment. Yin (2009:43) states that in analytical generalisation the investigator strives to generalise a set of results to some broader theory (Rowley 2002:25). The set of results in this study could be generalised to the broad aspect of middle manager development.

Another thought about generalisation in case study research was raised in a question by Rowley (2002:25), namely whether generalisation is necessary, since it was derived from a positivist approach in which generalisation on the basis of samples is the norm. The question is explained by the statement that the case study should just be accepted as insights as it stands for readers to make the interpretation in terms of their own experience.

In this study, the validity and reliability were mainly considered in terms of the quality of its research design which was based on four logical tests and related tactics. The use of this

approach is considered valuable and is therefore summarised by many authors of social science textbooks, including leaders in this field such as Rowley (2002:21) and Yin (2009:41). These tests, together with the related case study tactic and the research phase during which the tactic occurs, are depicted in Table 7. In the part below Table 7, the selected tactics which were used in this study to establish its validity, reliability and generalisation are explained.

Table 7: Case study tactics for four design tests
Sources: Rowley (2002:21); Yin (2009:41)

Test	Case study tactic	Phase of research when tactic occurs
Construct validity (operational measure for concepts being studied)	Use multiple source of evidence Establish chain of evidence Key informant's review of draft case study report	Data collection Data collection Composition
Internal validity	Pattern matching Explanation building Time series analysis	Data analysis Data analysis Data analysis
External validity (apply findings to other settings)	Use replication logic in multiple case studies Use case study protocol	Research design Data collection
Reliability	Develop case study data base	Data collection

3.3.1. Construct validity

In accordance with the case study tactics mentioned in Table 7, this study applied two tactics during the data collection phase to ensure construct validity, namely the use of multiple sources of evidence and the establishment of a chain of evidence; and one tactic during the composition phase, namely the use of an informant to review the draft case study report. Gibbert and Ruigrok (2010:712) state that construct validity of a procedure refers to the extent to which a study investigates what it claims to investigate, namely accurate observation of reality. This is done through a well-considered set of actions rather than subjective judgements (Yin 1994:41). Yin (1994) and Rowley (2002:20) state that construct validity relates to the correct operational measure for the concepts being studied. This is concerned with exposing and reducing subjectivity by linking data collection questions and measures to research questions and propositions. The positivist literature

provides concrete actions, namely triangulation of different sources of data supported by a clear chain of evidence that needs to be provided (Gibbert and Ruigrok 2010:712). This ensured that different angles could be considered. Construct validity was viewed as a type of internal validity.

3.3.1.1 Use of multiple source of evidence

Qualitative validity means that the researcher checks for accuracy of constructs by employing different procedures. Rowley (2002:23) states that multiple sources through triangulation benefits a study as one of the strengths of triangulation is that it provides a firmer foundation for understanding and managing issues such as validity and reliability as data collection and analysis can be structured. Rowley (2002:23) explains that research triangulation corroborates the same fact or finding. Leedy and Ormrod (2005:97) support this as they relate validity to controls so that conclusions can be based on valid data. Jack and Raturi (2006:352) point out four types of inferences that are made possible through triangulation. These are complementary inference (similarities across studies), convergent inference (solidifying of propositions), divergent inference (inconsistency between two strands of a mixed method study) and meta inference. Creswell (2014:201) also supports the view that validity strategies, which relate to multiple approaches, should be implemented to enhance the researcher's ability to ensure accurate findings based on the strength of the inferences made from the research. The general view is therefore that findings should convince the reader that the research is trustworthy, authenticated and credible.

In this study, complementary inferences (similarities across studies) applied - inferences were considered against the accuracy of the findings from the standpoint of the researcher, participant and reader. Inferences were made from data collected in phases, which were linked to the use of different techniques, namely a questionnaire, interviews and document review. Different techniques were applied to collect responses to questions relating to the study's constructs. "Meaning" was thus from multiple data sources as it was constructed by the researcher (from the literature); through the perception of participants in terms of the importance of factors and strategies expressed in data gathered with the aid of the questionnaire; and through qualitative data gathered during structured interviews from participants in terms of 'how and why' factors and strategies impact on their career path success; and institutional documents revealed answers to 'who, when and where' questions pertaining to the research questions of the study. The sequence followed in this

study is acceptable as Creswell (2003:211) alludes to the fact that when data is collected in phases, either qualitative or quantitative data can be collected first.

With regard to the validity of quantitative data collected through a survey questionnaire, Babbie and Mouton (2011:648) define validity in quantitative research as a term describing a measure that accurately reflects the concept which it is intended to measure. Construct validity of the survey questionnaire was considered very important since the qualitative questions posed during interviews were based on the responses to questions in the constructs of the questionnaire. The following two procedures advised by Yin (2009:42) were employed to ensure construct validity during the data collection phase.

In order to test the constructs, two steps were followed. As a first step, the concepts relating to the objectives of the study were defined. The second step was to identify operational measures that match the concepts. Related library studies were examined with a view to consider measures used in these studies. Since the constructs of this study matched some of the constructs developed by Golden (2006), Hellriegel et al. (2012) and Sturges (1999), the constructs of this study were developed from these constructs.

With regard to the validity of qualitative data collected through interviews, typical validity strategies in a case study were applied, namely member checking, rich descriptions, clarification of bias, presentation of negative or discrepant information, the researcher's prolonged time in the field and peer debriefing (a person appointed for this purpose to consider correctness of the study in terms of its research questions and the data, significance to the human resource development field, the research design and findings) and the use of a person to review and ask questions about the qualitative study. This interpretation beyond the researcher adds validity (Jack and Raturi 2006:352; Creswell 2014:202-203).

3.3.1.2 Chain of evidence

Rowley (2002:23) states that in case study research the chain of evidence should be maintained. It must be clear in the database that the collection followed protocol and the link between protocol questions and propositions should be transparent. The way the data was collected should be transparent. Creswell (2003:15-16) states it should reflect how the collecting and analysing of both forms of data in a single study benefitted the results; one method can be nested with the other to gain insight to different levels of the unit of

analysis. Variations within these methods pertain to sequential procedures, concurrent procedures and transformative procedures.

In this study, the phases in which the data was collected were reflected in the chain of evidence. Evidence pertained to quantitative data which reflected responses received from 'closed and open-ended' questions respectively in accordance with a concurrent procedure so that it was possible for the researcher to consider quantitative and qualitative data to provide an understanding of the research problem. Since the researcher needed further interpretation of data collected during the concurrent phase and additional information, the chain of evidence further reflected qualitative data collected by means of a sequential procedure when questions were posed during scheduled interviews; and lastly the chain of evidence reflected qualitative data collected during the sequential procedure when responses to questions could be gained through content analysis of institutional documents. This allowed for a chain of evidence collected for different reasons, namely evidence from the questionnaire as the only way of measuring the properties of the phenomena (attitudes towards certain topics pertaining to career path success) (Babbie and Mouton 2011: 49); through interviews which provided the insider's perspective of participants (Babbie and Mouton 2011: 53); and through institutional documents which provided the insider's perspective of the research site.

3.3.1.3 Review of the draft case study report

Construct validity was also tested during the composition phase when a key informant reviewed the draft case study report which reflected the results and findings of the case study. The report was written within the guidelines provided by Rowley (2002:24) and Yin (2009:90). Yin (2009:90), however, alludes to the fact that the case study reports do not have a uniformly acceptable outline. Investigators should therefore be concerned with the design of the final report throughout the study.

The report, however, had clear sections which relate to the case study database that it drew from by an indication of appropriate citation of documents and interviews. As advised by Yin (2009:90), the report had an annotated bibliography which reflected the itemised available documents in the database, should they be required for further inquiry. The report was written for the intended audience to read it, namely the examiners of this research and practitioner professionals of ODL libraries. The focus was thus primarily to reflect mastery of the methodology used and an understanding of the way the research

contributed towards existing knowledge and secondarily for professional practitioners who may need insight into development factors and strategies, including competencies, which impact on career advancement and success.

The draft report was reviewed by an ODL manager who forms part of the ODL Library's executive leaders. This person did not participate in the questionnaire and interviews and was therefore in a position to review the report and consider the recommendations objectively as a whole. A positive written response was received from the person stating the value of the research. Minor changes to the text were suggested.

3.3.2 Internal validity

In accordance with the case study tactics mentioned in Table 7, this study applied explanation building and pattern matching during the data analysis phase to ensure internal validity. Yin (2009: 42) and Rowley (2002:20) state that internal validity is mainly a concern in explanatory studies when an investigator needs to explain how and why one event led to another. Since the purpose of this study is to explain, internal validity was considered during the data analysis phase when the results and findings of multiple sources were explained. Gibbert and Ruigrok (2010:714) agree that internal validity takes place during the data analysis phase and explain that this is when researchers wish to ensure validity to convince themselves and the audience that the findings are based on critical investigation.

During this phase explanations relating to causes and relations were examined to determine whether they were true in terms of the data collected within the specific research site and the questions asked as part of the research design. Internal validity was thus considered in terms of the extent that the study relied on theoretical propositions, development of the case description, the use of both qualitative and quantitative data and the examining of rival explanations.

Based on the quantitative results and qualitative findings in this study, it was considered what selected development factors and strategies cause success or do not cause success, as distinguished from spurious relationships. Yin (2009:132) states that using both qualitative and quantitative data is a strategy that yields 'appreciable benefits', should quantitative data be subjected to statistical analyses at the same time qualitative data is central to the case study. Yin (2009:133) further states that the quantitative data should be

used to cover the behaviour or events that the case study is trying to explain. This data may also relate to an embedded unit of analysis within the broader case study. The qualitative data is then critical, in either situation, to explain or test the case study's key propositions. The degree to which conclusions about causes of relations were considered as true was explained, in terms of the measures used, the research setting and the whole research design as advised by Rowley (2002:20). Yin (2009:133) states that in such a case the data relates to an embedded unit of analysis. This provided collected, fine grained quantitative data which was complimented by qualitative data collected through interviews and institutional documents on the ODL institution and its Library. The inference is based on both quantitative results and qualitative findings collected as part of the case study.

Yin (2009) further states that a way to ensure internal validity is to assess whether the research framework for the case study was explicitly derived from the literature. This means that there must be evidence of diagrams or verbal descriptions of the relationships between variables and outcomes. Secondly, there would be evidence that empirically observed patterns were compared with predicted patterns or patterns from previous studies in different contexts. Researchers compare and discuss own data with that of previous research. Thirdly, triangulation enables the researcher to verify findings by adopting various perspectives.

3.3.3 External validity

Gibbert and Ruigrok (2010:714) state that case study research (internal or multiple case studies) does not allow for external validity or generalisation, namely inferring conclusions about the population. This is also the view of Yin (1994:31).

In accordance with the case study tactics mentioned in Table 7, this study applied the use of a protocol during the data collection phase in order to ensure external validity.

The protocol of this study is available in Appendix 11. This protocol was developed in terms of the guidelines applicable to a case study protocol provided by Rowley (2002:22) and Yin (2009:79-82). It is accentuated that the case study protocol should be followed during data collection and that the link between the protocol questions and propositions should be transparent. Jack and Raturi (2006:345) find this useful as the data is collected as responses to questions asked about the same phenomenon during different phases of the study.

Rowley (2002:20) and Yin (2009:43) explain external validity as the domain to which the study's findings can be generalised and state that generalisation in case study research can only be performed should the case study design be informed by theory. Gibbert and Ruigrok (2010:714) also state that the rationale for the case study should be reported, namely to what extent it was a representative case for an organisation in a given industry. In this study, the domain related to the ODL environment and the case study design was informed by concepts derived from theory. Theory informed the research questions and propositions and the related constructs within the questionnaire as well as the semi-structured questions in the interview protocol. The advice provided by Rowley (2002:20) informed the study, namely that the comparison of the two theories should be recorded from where the generalisation could be considered. Statistical generalisation was possible through quantitative data collected and analytical generalisation was particularly possible as a set of results, based on findings from qualitative data and previous research in another library type, could be compared with this research. In the data collection phase, generalisation was considered in terms of the case study's design informed by theory which led to a contribution to the knowledge base.

Babbie and Mouton (2011:642) allude to the fact that generalisation pertains to the quality of a research finding that justifies the inference that it represents. This should be something more than the observation on which it was based. This can involve the generalisation of findings from a sample to a population or a generalisation of a concept. In this study, generalisation to other ODL libraries was considered in terms of the theory on factors and strategies which influence the career path in a specific ODL Library (as a sample of all ODL libraries worldwide), which can be generalised.

3.3.4 Reliability

In accordance with the case study tactics mentioned in Table 7, this study established a case study database in support of reliability. The case study database reflected the chain of evidence maintained in support of internal validity. The database contained evidence, described by Rowley (2002:23), such as the report on the analysis of quantitative data and qualitative data, case notes made by the investigator during the collection of qualitative data like interviews, interview transcripts and analysis of evidence as well as evidence of the analysis of related institutional documents. Rowley (2002:23) alludes to the fact that the database should be a well organised collection of the evidence base. It will be accessed in future for reliability purposes to see if the findings were the same if the

research is repeated in accordance with this case study. In this regard, Gibbert and Ruigrok (2010:715) state that reliability refers to the absence of random error, enabling the next researchers to arrive at the same insights should it be in accordance with the same steps again.

Creswell (2014:201) states that the database will also indicate whether the researcher's approach was consistent with regard to the same questions being posed to different participants. Yin (2009:79) suggests that the case study procedures followed should be documented as part of a detailed case study protocol. The case study protocol is a major way of increasing reliability in case study research. Gibbert and Ruigrok (2010:715) state that reliability in this context refers to transparency and replication.

Reliability of this case study was considered in terms of these procedures. Other qualitative reliability procedures which are reflected in the database include those pertaining to the checking of the transcripts for mistakes; ensuring that there is no drift in definition of codes; cross-checking of codes by comparing results that are independently derived, the intercoder agreement signed with a person who cross-checked the codes; ethical considerations such as whether participants agreed to the accuracy of recordings.

3.4 CHARACTERISTICS OF THE RESEARCH SITE

The institution was selected as a "purposefully selected" site (Creswell (2009)). A purposefully selected site is a site which would assist the primary researcher in addressing the problem statement and purpose of the study. Since the researcher resides in South Africa where the site is situated, this site was preferred for practical reasons. In South Africa, this ODL Library is connected to the only ODL institution in the country. This is indicated through a review of ODL institutional websites and higher education publications.

As part of the selection process to select an appropriate ODL institution, other significant characteristics which were examined to consider an appropriate site were those relating to the vision, mission and goals of the University and its Library in order to ascertain the value placed by the institution on ODL (University of South Africa 2014b:8). Also, other aspects such as the institutional identity, which includes the size of the organisation, the status of the institution as an ODL institution and the extent to which it subscribes to Distant Education principles developed by the International Federation of Library Associations (IFLA) and the quality indicators for ODL institutions adopted by the Commonwealth of Learning (Menon 2007:1); the institution's strategic plan and the role of

the Library in strategic planning; the role of its Library in support of research, teaching and learning as well as community outreach. It was believed that these aspects would indicate to what extent the Library applies business management principles and functions to ensure effective services within the ODL context in which it operates; and the level of variety within the research site to be selected.

An examination of statistical documents reflecting the institution's size, revealed that the institution has an enrolment figure of approximately 400 000 students (University of South Africa 2014a:1). An examination of institutional documents, such as the institution's Operational Plan (IOP) 2013-2015 (University of South Africa 2010:11), revealed that the institution's strategy unfolded since 2004 and that its planning was done in accordance with business principles. An innovation in the institution's planning is an annual compact with the Minister of Higher Education and Training in terms of which the pre-determined objectives for the following year are set. As part of the planning framework, documents such as the Service Charter and Transformation Charter were considered.

It was also considered to what extent the institution and its Library acknowledges the concepts within the two most recent contemporary management theories, known as the Principle-led theory and the Flexible management theory. The Principle-led theory aligns with career development and institutional identity which feature prominently as contemporary matters to be addressed. Flexible management theory has a strong focus on global service delivery which forms part of the ODL Library environment. The examination revealed that all of these are reflected in the institution's identity.

Answers to questions pertaining to the size of the institution are provided in Chapter Two as part of the discussion as to why the ODL Library differs from a library at a residential university. It can, however, be summarised that the selected ODL institution has a vast history in distance education and has grown to be a leading open distance learning institution in Africa. It is known as one of the mega universities in the world and its Library is a leading ODL Library in Africa.

Variety within the research site pertains to the fact that some of the ODL Library middle managers manage the respective Unisa branch libraries which include 10 Branch libraries at the institution's regional centres, mostly in South Africa and one in Ethiopia (Unisa Library 2014a:1). Each of the participants works in one of the Library's four directorates, namely Directorate: Client Services, Directorate: Information Resources Distribution,

Directorate: Information Resources Collection Management and Directorate: Corporate Services. They operate on different management levels within the Library's hierarchy (director, deputy director, manager and supervisor). Figure 2 below depicts the various directorates within the ODL Library where the respondents work. These directorates operate as business units, each with its own business focus. This means that the ODL Library's management team is quite diverse in terms of their business focus. Figure 2 indicates the number of respective middle managers per job title that were invited to participate in the research survey. It indicates an uneven spread of middle managers per directorate. This middle manager team is spread over four layers of middle managers within the hierarchical structure of the ODL Library, with supervisors reporting to managers, managers reporting to deputy directors, deputy directors reporting to directors. The directors report to the ODL Library's top management, namely the Executive Director.

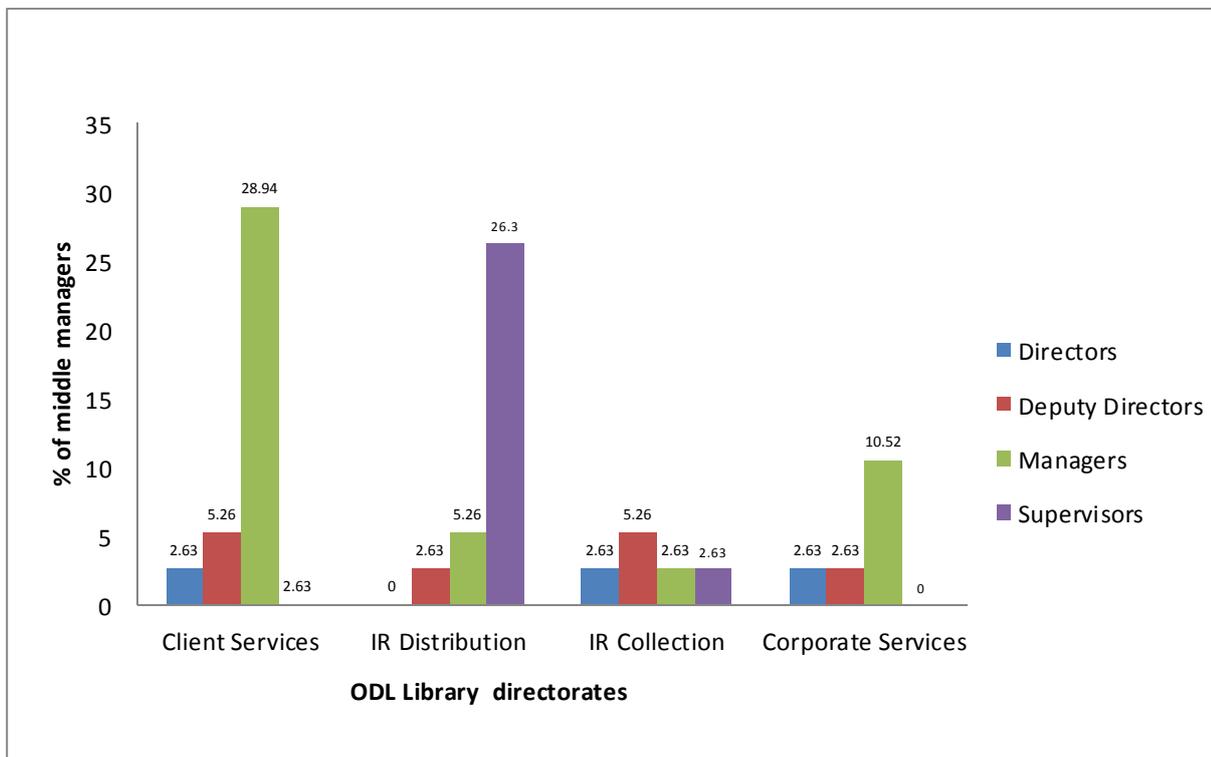


Figure 2: Respondents by ODL Library Directorate

The views of the respective areas in which the managers operate could therefore be reflected. Products and services of the ODL Library pertain to clients that visit the relevant Branch libraries and Subject and Research libraries as well as clients that use the Library's centralised Request services within the Muckleneuk Library because they cannot visit the Unisa libraries. Middle managers (including directors, deputy directors, managers and supervisors) from diverse ODL Branch and Subject and Research libraries thus formed the population that provided input to be analysed during the data analysis stage of this study.

This characteristic of the research site contributed to an important factor to be considered when determining the sample size, namely the level of variation in terms of the main variable to be studied.

Data was collected at this research site and the unit of analysis was analysed during the data analysis phase.

3.5 RESEARCH POPULATION

The population was the entire set of objects that the research needed to include. This population contained all the variables to be studied (University of South Africa 2000:147). Sampling techniques to be applied in determining the population involved the selection of a random sample from a list containing the names of persons that the researcher was interested in studying. This was done in accordance with probability sampling or non-probability sampling. The latter is mostly appropriate, particularly in social sciences when the kind of probability samples used in large scale social surveys are not possible. Four types of sampling apply to non-probability sampling. These are reliance of available subjects, purposive (judgemental) sampling, snowball sampling and quota sampling. In this study, purposive or judgemental sampling applied in accordance with the directive of Babbie and Mouton (2011:166-167). This selection was based on own knowledge of the population, its elements and the nature of own research aims. All the members or a subset of the population can be selected. It may be required to select the widest variety of respondents to test the broad applicability of the questions to ensure that collected data is sufficient for the purpose of the study (Babbie and Mouton 2011:166).

The population selected to collect quantitative data for this study was the same as the sample frame, namely an ODL Library middle manager community appointed to perform a job description for 'director', 'deputy director', 'manager, or 'supervisor' of teams. The sample size used in this study was dependent on the total number of people that should be represented by the data to be collected. Although the Library has approximately 300 staff members, only the 38 middle managers (supervisors, managers, deputy directors and directors responsible for teams) on the ODL Library's official staff list were considered as they operate on the middle management level within the ODL Library structure (Unisa Library 2014d:1). Since this number was relatively low, it was not viable to select a sample from this total. A single-stage sampling procedure was therefore applied (Creswell 2003:156) whereby all the members of the population are included so that conclusions can be drawn from this total group of people as the majority (at least 60% of the population)

had vast experience (more than 10 years' experience) as middle managers. The majority of the other 40% had at least 5 years' experience. Only three supervisors had less than two years' supervisory experience. The selection of the population was based on the views of Benbasat, Goldstein and Mead (1987:1), and Rowley (2002) who emphasise the importance of the experience of the subjects and the context in which they operate. The selection was also based on the researcher's own knowledge of the population, its elements and the nature of own research aims, including the objectives, research question and research design of this study.

The participants in the interviews were selected in terms of their vast experience, including a number of years' experience in accordance with the job description of the respective middle manager layers of the ODL Library. They can be seen as representative of a group of ODL Library middle managers. The population selected to collect qualitative data for this study involved a unit of observation which formed the basis for the case. Rowley (2002:19) states that in case study research it may be an individual person, such as a business leader or person with experience, an event, programme process, organisation, team or department in an organisation. Qualitative research is generally based on non-probability and purposive sampling rather than probability or random sampling approaches (Creswell, Ebersohn, Eloff, Ferreira, Ivankova, Jansen, Nieuwenhuizen, Pietersen, Plano, Clark and Van der Westhuizen 2010:5). Purposive sampling is done when participants are selected because some defining characteristic requires the holders of the data to participate. A key issue is that the case study should only ask questions about the unit of analysis, which in the case of this study was the ODL Library's middle manager career path development.

In this study, the selection of participants was thus done within the sample frame in accordance with the roles performed in the respective job descriptions of managers operating on the respective management levels in the ODL Library. The aim of collecting qualitative data from these ODL Library middle managers was to consider deviant cases or to improve the understanding of fairly regular patterns of attitudes and behaviours by examining the cases that do not fit into the regular pattern (Babbie and Mouton 2011:166). In the case of this study, the qualitative samples were thus extracted from the sample frame, based on the participants number of years' experience and the four respective middle manager roles within the ODL management hierarchy, namely director, deputy director, manager and supervisor.

3.5.1 Characteristics of the population

The population was characterised in terms of the management definition that applied to them, the person's position within the ODL Library's hierarchy and the respective input towards the library's service and demographic information.

The ODL Library's entire middle management team was targeted to participate in the survey questionnaire. The population involved various staff members within the hierarchy of a large size library which ranged between first-line managers and directors. The entire population was appointed as full-time staff on the Library's middle manager level. The respective middle manager levels operated below that of the university librarian who operated on the Executive Director level and reported to a line manager on the Vice-principal level of the university. All these middle managers were collectively responsible for either the management or supervision of the Library's teams.

The middle management categories can be further sub-categorised as middle managers responsible for professional staff and administrative staff respectively. All members of the population, however, relate to the parent institution, namely the University of South Africa.

Although the entire population, consisting of 38 persons, belonged to one parent institution, the population was, however, heterogeneous in terms of gender (72% female and 25% male - one person did not disclose gender), linguistic culture (38.89% of the respondents to the closed-ended questionnaire were English/ Afrikaans speaking middle managers and 61.11% African language speakers); and age (age distribution of participants was such that 61.11% of middle managers fell in the less than 51 years age group and the remaining 38.89% of middle managers in the above 50 years of age group). In terms of qualifications, the job requirement of the different middle managers in the management hierarchy differed.

The business language spoken at the research site is English. There is, however, various official language groups in South Africa, in accordance with the country's acknowledged official languages namely (in alphabetical order) Afrikaans, English, Northern Sotho, Southern Sotho, Swazi, Tswana, Venda and Zulu. In Figure 3, the groups are presented as an Afrikaans/English group and an African languages group. The middle managers were also diverse with regard to location (79% worked in the Main Library known as the Muckleneuk Branch; 21% worked as heads of branch libraries in 10 Regional branch libraries in South Africa and in one branch library in Ethiopia respectively) (Unisa Library

2014b). They thus reflected the views of persons who speak different home languages and resided in various provinces in South Africa as well as in another African country.

The members of the population were trained to perform their respective roles. The ODL Library in which they worked viewed the development of staff in a serious light as they budgeted annually for staff training. Line managers approved the PDP (Unisa Library, 2015c) of middle managers as part of the annual Institutional Performance Management System (IPMS) (University of South Africa. Department of Human Resources, 2015). Library middle managers were responsible for the employee development programme of staff reporting to them. They were also involved in the Library's mentoring programmes and conducted career conversations with their staff as part of the institution's Talent Management initiative which was implemented in recent years.

Against this background on the population of this study, it was evident that the total available ODL Library middle management population of the ODL institution had to be included to participate in a survey questionnaire in order to determine the perceived importance of the survey constructs in collecting quantitative data. For the collecting of qualitative data, middle managers operating as directors, deputy directors, managers and supervisors with extensive experience were considered for participation in the interviews, based on experience in the ODL Library. In the selection of participants to participate in both the questionnaire and interviews, the researcher had a 99% confidence level in the selection of these staff members to form the population in terms of their vast experience in the ODL Library and the management level on which they operate. In the case of this case study, the only concern was that only two members that participated in the questionnaire had less than five years' experience. Most were therefore experienced ODL workers with a good understanding of what it entails to be a manager in the ODL environment. It met the accuracy level against the target pertaining to the rule of thumb, namely it met a 95% confidence level and exceeded the 3% acceptable accuracy level mentioned by Ngulube (2005:130), since purposive sampling was applied. In the case of the survey, the sampling error formula was applied.

3.5.2 Participant roles

An examination of the Library's structure revealed that there were four specific roles within the middle management staff category of the ODL Library. The roles of these middle managers varied in accordance with the job description pertaining to the management layer on which the person operated, but contained typically four Key Performance Areas (KPA's). These included planning (daily operational planning or long term planning depending on the role in the hierarchy), management of the section/ division (depending on the role in the hierarchy), managing human resources, financial management (in the case of the supervisors only budgeting requirements were determined). The knowledge requirement for these middle managers included, inter alia, knowledge and understanding of the principles of team supervision (Unisa Library 2015b:5). The job requirements for these positions included a professional qualification and experience. The performing of roles on higher levels in the hierarchy required more extensive experience. Since the majority of the participants had occupied middle manager positions in the ODL industry for many years and the fact that all of them, except those that occupy first-line management positions, had already met the job requirement pertaining to experience as a pre-requisite to be appointed to the position of middle manager, the choice of population to participate in the study indicated that these persons were an appropriate choice to form the population.

Since the Library was managed as a business due its large size and extensive ODL service menu, which accommodated face to face library and information services and online services respectively, the focus of the ODL Library middle manager's role was linked to the requirements of the relevant business unit. The directors were heads of business units and managed a team of managers, namely deputy directors mostly responsible for services within a division and managers reporting to them. Managers were responsible for sections and some managers had a layer of supervisors responsible for teams reporting to them. These supervisors were mostly responsible for the supervision of workflow in a section and the staff reporting to them.

The inclusion of these role players enabled the researcher to gain a perspective towards middle management development in order to perform the respective middle management roles in addition to development factors and strategies that led to career path success at multiple managerial levels within the ODL Library. This contributed towards the fostering of an understanding of the development needs to be addressed in terms of the importance of

certain influences on career path success and the extent to which these staff members feel satisfied in performing these roles.

3.6 SOURCES OF EVIDENCE

Data collection pertained to the way the data would be collected, data reduction and processing, and the design of the data analysis procedure. The way in which the data would be collected was considered in terms of two steps applicable to this process, namely the technique to be used and the collection of the data (Fowler 1993:54). Data was collected through a survey questionnaire, interviews and institutional documents. This was done in addition to a thorough literature review on the role of managers within the organisational structure, their development needs, and factors and strategies which contribute to their advancement, for purposes of either confirming or refuting, or discussing the claims of sources during the data analysis phase. Details relating to the respective techniques are provided, including the procedure which stipulates how the data was administered.

3.6.1 Survey questionnaire: quantitative data

In this study, the questionnaire was the first data collection instrument in terms of the study's case study design. The characteristics of survey research, which have influenced the use of this technique for this study, are discussed in the literature by many researchers (Babbie 1990: 56-57; Creswell 2003:14, 56-57; 2014:13; Babbie and Mouton 2011:232). These characteristics pertain, inter alia, to the fact that survey research is the best method available to the social scientist interested in collecting original data for describing a population too large to observe directly. This characteristic contributed particularly to the decision to use this method since members of the population under study were geographically spread in more than one country. It was therefore not possible to observe the population directly in a short period of time. A cross sectional study, namely data collected at one point in time with a view to describe and determine relationships, was thus possible. Since this study sought an understanding of 'what' ODL Library middle managers perceive as important factors and strategies that impact on their development in their career path, a researcher designed questionnaire was used to measure the opinions of ODL Library middle managers.

It was a web-based, structured questionnaire in English with 24 questions, based on the

research questions of this study. The web-based data gathering instrument was effective as it can reach geographically isolated respondents, like the middle managers working in various provinces in South Africa and a middle manager operating in another African country. The questions aligned with the study objectives pertaining to the empirical research and the demographic information of the participants (Appendix 5). Since the research topic aligned with that of the study of Golden (2006), which was conducted on public library middle management development, various questions presented by Golden (2006) on development factors and strategies relevant to this study were included or combined with questions in the self-constructed questionnaire. It also aligned with competencies that lead to managerial success identified by Hellriegel et al. (2013: 30-47). Since competencies form an integral part of library middle management in an ODL environment, management competencies that lead to success were included in this questionnaire as a development strategy in addition to the development strategies identified by Golden (2006).

The survey questionnaire was distributed to investigate the ODL Library middle management phenomenon through the capturing of data from closed-ended questions and open-ended questions. The fact that both closed and open-ended questions were asked meant that value was added since participants had an opportunity to include additional data relating to the quantitative questions. This was in line with the advice provided by Creswell (2003:20) as he states that data collection can involve the gathering of both numeric information on an instrument and text information to elaborate on the quantitative questions. In terms of the priority or weight placed on the quantitative and qualitative approach within this study, the priority was given to the quantitative approach as the questions within the constructs are based on theory with a sound foundation. It needed to be established as to how the findings of the study related to the findings of other research studies on the same type of topic.

3.6.1.1 Construction and layout of the questionnaire

Prior to the construction of the questionnaire, a literature study of the subject field was conducted to consider how the research problem related to the context of the general body of scientific knowledge. In terms of the research title, key concepts which were examined in the literature to understand ODL Library middle management development pertained to organisational theory; management theory; career success; managerial career development strategies; management competencies; factors influencing career success;

and ODL. It focused the study on key concepts and variables pertaining to the research problem (Babbie and Mouton 2011:565-566). This led to the identification of development strategies, including career strategies and competencies, as well as internal and external factors relevant to the context of middle management success derived from theories relating to middle management development that could be investigated in the ODL Library environment. The approach followed in organising the literature for this study pertained mainly to three broad categories: the views of staff on career success; development factors and career development strategies which influenced the appointment of middle managers; development factors, including competencies and career development strategies, which facilitated success after the appointment of middle managers.

The following construction and layout were applicable to the questionnaire which was used in this study. It reflected the collected research facts about the topic, packaged in a systematic way for statistical analysis and testing. The design of the questionnaire as a survey instrument was such that questions were placed from the general to the specific. Questions on similar topics were kept together within these categories as it was important for the analysis of data later on.

Appendix 5 contains the questionnaire. A total of 24 questions with variables for analysis were included in five broad categories, each with its own focus areas (Category A-E below), as follows:

Category A had three focus areas. The first two focus areas provided general information and matters of ethical concern listed as informed consent. The title of the research study was provided, as well as the purpose of the study, the procedures to be used, potential risks to participants and the potential benefits of the study. Ethical issues discussed in a second focus area pertained to the protection of the identity and privacy of participants and the fact that participation was voluntary, followed by Question 1 which was raised so that the participant could respond by indicating whether consent to participate was provided. The third focus area contained questions to collect general-biographical information about the unit of analysis (Question 2, 3, 4, 5 and 6). These questions, which pertained to the Library where the person was employed, number of job changes prior to appointment, gender, age group and home language, were important as they were used as variables when correlations were made with other questions.

Category B pertained to defining success (Question 7). It related to the view of the

participant on the importance of five statements relating to success and was followed by an open-ended question to encourage participants to provide other success definitions. Question 8 tested the extent to which the participant perceived his/ her own career success in terms of the success definitions and to provide other reasons for being successful in an open-ended question.

Category C measured factors and strategies which influenced the appointment of the person to a middle manager position in an ODL Library. This category contained three focus areas, namely Question 9 on formal qualifications (which included an open-ended question so that participants could add other qualifications obtained); and Question 10 on work experience; a second focus area which tested development approaches/strategies that facilitated the person's appointment (Question 11), followed by a third focus area which pertained to the influence of external factors (over which one had no control) on the person's advancement to be appointed to a middle manager position (Question 12). Question 12 included an open-ended question so that participants could add other factors that facilitated the appointment. These questions are specific in measuring external factors that might impact on career path growth.

Category D pertained to development needs of ODL Library middle managers after appointment and the facilitation thereof. Question 13 tested the needs of ODL Library middle managers, namely the importance of knowledge required to perform the role of a Library middle manager, followed by Question 14 on the importance of career development strategies after the appointment as middle manager. Question 14 included an open-ended question on other development strategies required to perform the role. Question 15 tested the extent to which the participant used the development strategies successfully. Questions 13-15 were included as they investigated whether the mechanisms in place to inform staff about opportunities in the enterprise were adequate and whether staff benefitted from these strategies to the point where the person performed successfully.

Question 16 covered internal factors (innate or developed) which contributed to middle manager success after appointment. It included an open-ended question on 'other internal factors' that facilitated an optimal career path. Question 16 was included in order to establish whether there was a relationship /correlation between internal factors and external factors (Question 12). Questions on career development strategies in Category C and D were similar in nature as they gathered information on career development

influences prior to and after the appointment. These questions were important for the data analysis at a later stage as they might indicate a relationship.

Category E had two focus areas, namely one that focused on 6 key managerial competencies (Questions 17-22) followed by an open-ended question to invite the participant to list other key managerial competencies. The last focus area pertained to the importance of management competencies followed by Question 24, which was linked to Questions 17-22 as it tested the extent to which the participant perceived him/her to be successful in the six managerial competencies.

Questions 17-24 were included as they investigated whether the mechanisms in place to inform staff about opportunities in the enterprise were adequate and whether staff benefitted from these strategies to the point where the person performed successfully.

Unstructured open questions were included to provide an opportunity to participants to express their ideas freely without the control of the researcher and on a voluntary basis. These were Questions 7 and 8 on success; Question 9 on formal qualifications; Question 11 on development strategies which influenced the appointment of a middle manager; Question 12 on external factors which influenced the appointment to middle manager; Question 14 on continuing development strategies; Question 16 on internal factors which influenced the career path of middle managers after the appointment; Question 23 on other key competencies required by middle managers. Respondents could use their own words in the responses as opposed to fixed responses in the structured, quantitative questions which included single or multiple choice questions or rating scales.

The researcher considered all pitfalls described in the literature with regard to wording used in the questionnaire. A serious effort was made to ensure that terminology concerning a concept was explained. This was presented in bold typography in italics and done in such a way that it appeared when the cursor was hovered over the word. Instructions were made clear in bold typography with a large size font.

The organisation of the responses was considered at an early stage of the questionnaire design to ensure that the resultant data reflected the development practice of ODL Library middle management with regard to certain constructs. The Likert scale, which is useful for measuring perceptions, was used as a basis for the questionnaire design. The design pertained to a quantitative case study. In terms of the technique to be used to collect the data, the levels of measurement in the questionnaire were merely ordinal. Ordinal

categories require an ordering of the response categories. Babbie and Mouton (2011:131) state that ordinal measures can be used for variables with attributes that can be ranked logically in terms of order. Rating averages were calculated to indicate perceptions toward critically important; important; neither important/unimportant (neutral); not important; irrelevant; and to categories of most successful; very successful; neither successful/nor unsuccessful (neutral); somewhat successful; not at all successful; as well as the selection of statements that apply to the participants. Closed-ended questions included survey items that consisted of a request for an answer with explicitly mentioned answer categories, namely questions 9 and 11. These could be ticked to provide a response. Other survey items pertained mostly to a request for an answer. In such a case, no answer categories or rating scales were provided since the request for an answer was open-ended.

3.6.1.2 Pre-testing the questionnaire

Empirical research requires the researcher to conduct a pre-test of the research design prior to conducting the final research (Babbie 2005:265). There is a distinction between two types of testing, namely pre-tests and pilot studies. Pre-tests pertain to the testing of one or more aspects of the research design while a pilot study can be considered a dress rehearsal of the whole study design (Babbie 1990:220). For this study, a pre-test was done. Each question corresponding to one of the research questions was pre-tested to determine whether the questions measured the views on career success, identified competencies, factors and strategies that influence career success. Appendix 3 contains the form that respondents had to complete during the pre-testing phase.

3.6.1.3 Selection of the pre-testing participants

The participants were selected in accordance with the guideline provided by Babbie (1990:222) who alludes to the fact that a characteristic of a pre-test is that participants do not constitute a representative sample. The broadest range of potential respondents should participate but they should include both expert researchers and representatives similar to the survey population. In the pre-test of the instrument for this study, the first category participants comprised an opinion group of five experts within the disciplines of the research study and with knowledge of empirical research and survey instruments respectively. A second category comprised research design experts who could advise on the way questions were formulated, questionnaire format and flow of questions within the constructs. This was required even though the researcher had worked closely with a statistician in the ODL University for a period of about one month prior to the pre-testing in

order to consider the questionnaire design and way the questions were formulated.

Data collection of the pre-test questionnaire included a letter explaining the research by the supervisor of this study, the monitoring of the deadline and the response rate. Table 8 depicts the distribution of the draft questionnaire to selected participants, namely experts, ODL Library professionals and ODL Library middle managers.

Table 8: Distribution of pre-test questionnaire

Participant	Questionnaires distributed	Responses received	Reason for inclusion
Inter-disciplinary experts	4	4	Content validity: Opinion group with knowledge of business management; staff development; ODL librarianship
Research design experts	1	1	Questionnaire format, flow of questions and formulation of questions. Knowledge of development of Library surveys to be distributed to ODL students
ODL Library professionals	3	3	Information professionals
Library middle managers	4	4	Nelson Mandela Metropolitan University (residential University Library in South Africa); Open University (ODL University in the United Kingdom)
TOTAL	12	12	

3.6.1.4 Pre-test response

A total of 12 responses were received from the participants during the pre-testing phase. This represented a 100% feedback. Participants had to report on the time spent on completing the questionnaire, questions to be added, superfluous questions, ambiguous questions, and to pass criticism or make recommendations with regard to the content and format, and average time to complete the questionnaire (Appendix 3). It was reported that the average completion time was 25 minutes. No complaints about the length or format of the questionnaire were received. Some participants indicated changes on the questionnaires and some provided input on the relevant form sent out together with the

questionnaire.

Valuable comments were received and changes were made to the questionnaire before final distribution. Most comments pertained to the reformulating of some vague questions or instructions, with examples of how these could be improved. These proposals were discussed with a statistician and they were adopted in most cases. Definitions were worked in as suggested - this resulted in an improvement on vague concepts that needed explanation. These definitions were also presented, like others in the questionnaire, in bold typography in italics and in such a way that they appeared when the cursor was hovered over the word. The instructions were modified accordingly in bold typography with a large size font.

No additional questions were suggested or superfluous questions deleted. Positive feedback pertained mainly to the appropriateness of the content. The opinions received from this diverse group of participants contributed positively towards the content validity of the study and is discussed under that topic in this study.

The pre-testing was done over a period of almost three weeks in January 2015, when staff returned to work after the period when the university closes for the holiday season. This was a lengthy period since some of the participants were still unavailable in the first part of January. The final questionnaire was sent out in the last week of January 2015 after the availability of each participant was carefully noted. It was only distributed in a period when all participants were available. It was requested that the questionnaire be returned within three working days.

The first step in data collection was concerned with the design of the questionnaire and scaling methods and the second explained the procedures followed to gather the survey data, including the administering of the questionnaire, and then extracting the data from completed questionnaires for analysis and testing.

3.6.1.5 Administering the final questionnaire

As part of the administering process, three actions were involved. Firstly, a letter was written and signed by the study promoter. This was sent to the participants to explain the purpose of the investigation and to invite them to participate in the survey by the due date. Participants were reminded that their responses would be treated in a highly confidential manner in accordance with the University of South Africa policy for conducting research

involving Unisa staff, students and data. They were informed that a web-based questionnaire would be used and as such it would be difficult to identify respondents and that the data would be captured by a statistician of the ODL institution who would return it to the researcher for data analysis.

Secondly, the administering of the questionnaire included the distribution of the questionnaire. The web-based questionnaire (Appendix 5) was distributed to the population on SurveyMonkey (2009), known as a web-based tool for questionnaires, in order to collect data pertaining to the quantitative results. It was e-mailed to the participants in January 2015 when all participants were available, with a return date within four working days. All the participants had an e-mail address at work. In terms of the POPI Act, the University granted permission that their addresses may be made available for the purpose of this study. This was useful since all participants had computers which enabled them to receive the questionnaire at the same time, regardless of geographical location; and internet access which allowed them to open the SurveyMonkey questionnaire at the time the questionnaire was distributed. The instrument could only be completed once on each computer to prevent ballot box stuffing. The responses were anonymous, which means that the researcher was unsure of who the respondents were or which middle management position they occupied in the Library hierarchy. The researcher specifically did not raise this question in the questionnaire since some middle managers are the only middle manager within a Branch Library and could subsequently be identified.

Thirdly, the response rate was monitored and the responses checked to determine whether the participants provided consent to use the data for the purpose of this study; and completeness of the questionnaire.

The status of the number of responses received after three days was 81, 5%. Although the consensus is that a response rate of 50% is adequate for analysis and reporting and that response of 60% is good, and a response rate of 70% is very good, it was decided on the fourth day to send a follow-up mail to staff (Appendix 6), stating that an adequate response rate had been received but that the questionnaire would still be open should a person not yet have had an opportunity to complete the questionnaire (Appendix 6). It was, however, stated that an improved response rate would contribute positively to data collected since the population was relatively small. Four days later the questionnaire link was closed when the statistician responsible for the capturing of results reported that 38 responses had been received. Upon return, all 38 questionnaires were checked to ensure that they were

completed to the end. It was noted that a 94,7% response rate was reached since two questionnaires were not fully completed. This was done as a first step in validating the integrity of the data. Electronic data capturing of the closed-ended questions of the questionnaire then followed. This included a further data integrity check to ensure that responses were captured correctly. Data capturing was outsourced to a statistician who assisted with the design of the questionnaire and who had access to the storing of the questionnaire on Survey Monkey (2009). Participants were informed that the link to the questionnaire was no longer available. The completed online questionnaires were packaged in an electronic file for further analysis and testing by a statistician of the University who works as a Specialist: Institutional Research within the College of Graduate studies of the ODL institution.

Informed consent was provided by the respective ODL Library middle managers. Table 10 indicates that 38 participants (100%) indicated their willingness to participate in the research.

3.6.2 Interviews: qualitative data

In this study, the interview was used as a case study instrument. Creswell (2009:87) explains the aim of the interview as seeing the world through the eyes of the participant. An interview is a two-way conversation in which questions are posed to the participant to collect data about the ideas, views, opinions and behaviours of the participant.

Types of interviews are the open-ended interview held with the intention to explore; semi-structured interview held with the view to corroborate data emerging from other resources; structured interviews with detailed questions similar to survey research. It seldom spans a long time period and participants are requested to answer a set of pre-determined questions. Creswell et al. (2010:88) allude to the fact that the probing strategy should also be considered to obtain the maximum amount of data and to verify correctness of the captured data. This includes detail oriented probes, elaboration probes and clarifying probes (Creswell et al. 2010:89).

A semi-structured interview protocol (Appendix 11) with open-ended questions was used to collect qualitative data during the interviews, based on the research questions of this study. Yin (2009:79) states that the case study protocol has only one thing in common with a survey questionnaire, namely both are directed at a single point which pertains either to

the single case or the single respondent. Rowley (2002:22) states that data collection in case study research depends greatly on the competence of the researcher. It is different to the data collected through a questionnaire since the evidence to be gathered is defined as it is collected and the researcher acts as an active agent who approaches the study in an unbiased, flexible manner.

Planning of the qualitative interview was done in accordance with the guidelines provided by Creswell (2014:194) who states that information provided from interviews has to be planned and the answers should be recorded by the researcher who should make handwritten notes and audiotape the information. Interviews were primarily conducted to gain clarity on responses received in the quantitative questionnaire and to gain more qualitative information to enable the researcher to explain the impact of the role of the phenomenon on the ODL institution. In order to gain more in-depth understanding of the development practice of an ODL Library, face-to-face interviews were held with a selected group of ODL Library middle managers and institutional documents were examined. The aim of the interview was explained upon inviting the selected participants to the interview. This was repeated in the informed consent letter sent to the invitees and it was again explained during the interviews.

Interviews with managers oriented the researcher to nuances of 'how and why' certain strategies were deployed and 'how and why' selective factors influence a successful career path. The interviews also helped the researcher to understand the role of ODL Library middle management and the need of ODL Library middle managers for further development.

Creswell (2014:194) states that the interview protocol must include seven components, namely a heading; instructions; five questions; probes for the five questions; spaces between responses to record the responses; thank you statement; log of responses and documents for analysis. The interview protocol of this study contained details of the date, time and place of interview, interviewee position in the management hierarchy and name (to be captured as person A, B, C and D respectively) as well as the number of years work experience in the ODL Library. It also contained details of the purpose of the project and the five questions posed. The interviews started with an ice breaker question on what was understood by ODL middle manager development, followed by five questions pertaining to how ODL Library middle management could be developed in order to meet the success criteria that they perceive as important, the role of internal and external development

factors and career strategies, how development into performing a role with strategic impact can be done, and why certain competencies were perceived to be less important than others. It also had an instruction for the interviewer regarding matters to be attended to in order to ensure consistency in all interviews.

In preparation for the pre-testing of the interview, the skills of the researcher as an investigator were considered in terms of the guidelines provided by Yin (2009:69). The level of questions pertained to questions asked to specific interviewees (on different levels on the management hierarchy of the ODL Library) and questions on the specific case. Yin (2009:87) refers to these questions as Level one and Level two questions. The difference between questions on these two levels is that 'the verbal line is different from the mental line of enquiry'. Level one questions do not betray the thinking of the investigator. Level two questions, in the Case study protocol (Appendix 11), reflected what the investigator had in mind in terms of the response. Level two questions are more important than Level one questions (Yin 2009:87); the focus of the questions in the interview protocol for this study was thus on Level two questions.

Prior to the formal interviews, questions in the interview protocol were discussed with an expert responsible for institutional research design, appointed by the ODL institution. The person advised on how the questions can be improved, the use of an ice breaker question, how the researcher should behave during the interview and provided guidelines on how the interview should be conducted. Since the person sometimes provides training on how to conduct an interview to masters and doctoral students, a copy of a power point presentation used during training sessions was made available. This was done to ensure that qualitative data can be captured in the best possible way. The questions in the interview protocol were also discussed with a professor in the field of business management at the ODL institution to discuss the relevancy thereof. It was decided to select this person due to her vast experience in business management research and understanding of the purpose, research questions and aim of this study.

Formal pre-testing of the interview questions was done with one ODL Library middle manager with the rank of manager. This person was selected due to her vast experience in an academic library as well as a total of 33 years' experience in different branch libraries of the ODL Library. The person had similar ODL Library middle management experience as that of the interview participants. Prior to the pre-testing, a letter was sent to the participant to explain the research and invite the person to participate in the pre-testing

(Appendix 12). The person provided consent to participate in the pre-testing and to be recorded. The transcription of the interview served as indication of responses that could be received during the interviews. No superfluous or ambiguous questions were identified.

In order to ensure that the views of the respective managers in the management hierarchy could be captured, interviews were arranged for one hour with a supervisor, manager, deputy director and director respectively. Interview participants were key individuals selected on the basis of their vast experience and understanding of ODL librarianship. They were appointed by the ODL institution in permanent capacity to perform a management role in the management hierarchy. Three of the interviewees were selected from the African language group and one person from the English/Afrikaans language group.

All interviews of the interview participants were audio-taped and responses were also noted manually. The names of the persons were not recorded or listed in the hand-written notes to ensure anonymity. On the form, the person was referred to as Manager A, B, C and D. The position of the person in the managerial hierarchy was recorded as Supervisor, Manager, Deputy Director, Director as this might be relevant during the data interpretation phase of the study. The interview responses were to explain why certain responses to the survey questionnaire's closed-ended questions on factors and development strategies were indicated as important and how these could be developed.

3.6.2.1 Administering the interview data

As part of the administering process, a letter was written and signed by the study promoter. This was sent to the participants to explain the purpose of the investigation and to invite them to participate in the interviews (Appendix 10). Participants were reminded that their responses would be treated in a highly confidential manner in accordance with the University of South Africa policy for conducting research involving Unisa staff, students and data (Appendix 8). They were informed that the interview would be recorded on a tape recorder (Appendix 9). Participants were given an option to determine the venue that they were most comfortable with to be used for the interview. All invited participants on the respective management levels provided consent to participate in the interview. None of the interviewees withdrew at any stage of the interviews. The interviews were held as indicated by the participant as the preferred choice, namely in the researcher's office. It was checked by the researcher whether informed consent was provided by the participant

to participate in the interview and that the interviews may be recorded. The names of the interviewees were not recorded to ensure that their anonymity could be respected.

A letter was also sent by the investigator to explain the purpose of the study and invite selected middle managers to participate in the interviews. A consent form that indicated willingness to participate in the interview as well as a consent form in which permission was given to record the interview was submitted by the participant prior to the interview. In this study, the guidelines that were followed were provided by Creswell et al (2010:89), namely that the recording of the interview must be done in a structured way, after permission was gained to do the recording. The interview data was captured by the investigator and the recorded narratives were submitted to a professional person who transcribes recorded data.

Transcriptions of responses to the qualitative questions were captured word for word by a registered transcription company, namely Nikann Solutions, which trades in the Province of Gauteng, South Africa. The interview was transcribed word for word. Transcriptions were submitted to the participants for review, as part of member checking, to ensure that the transcriptions are accurate. It was not required to arrange a follow-up interview as participants did not have a need to discuss details in the transcriptions. The researcher, as an investigator, was in a position to interpret the answers due to the understanding gained during the studying of the literature and through experience gained as an ODL manager.

Before the coding was done, the researcher replaced the names of specific branch libraries that were mentioned by respondents during the interviews with the words ODL Library. The four themes of the study were coded as A (view of success), B (development factors), C (development strategies), D (competencies). These related to the research questions of the study. Relevant quotes of the respective ODL Library middle managers that related to each theme were grouped together and numbered. The focus was to select quotes that relate to the results of the quantitative data that reflect on similarities or differences in order for the researcher to explain the situation and provide meaning to the data. These quotes were further coded to reflect the voice of the respondent in the hierarchy, namely S (Supervisor); M (Manager); DD (Deputy Director) and D (Director) in order to be traced in the case study database when required. The quotes related to the questions in the interview protocol and included rival responses and responses in support of trends, emerging themes or patterns with information gathered as part of the literature study, quantitative questions or content analysis of institutional documents. This provided

an opportunity to bring in voices that differ from the researcher's own and enabled the researcher to study multiple constructed realities (Creswell et al. 2010:40).

Codes flowing from the transcriptions were checked by an appointed independent person who has conducted research before. The checking was done in accordance with a formal agreement signed by the person. It indicated the person's responsibility, namely to check the correctness of the quotes taken from the transcriptions and the correctness of the allocation of quotes to the domain and related categories with topics in the Codebook, which was compiled for the purpose of this study's data analysis; and the correctness of the codes allocated to the themes and quotes. Changes that were suggested by the person who did the cross-checking were recorded at the end of the Codebook. Relevant quotes identified by the person, which were excluded by the researcher, were added to the numbered list of quotes and are indicated with the letter 'a'.

Evidence regarding the interviews is available in the case study database for future use. Data gathering and the related analysis must be trustworthy, meaning that there must be proven evidence of the findings which reflect that it was contextualised within the existing body of knowledge on the topic. It needs to be indicated how it corroborates the existing knowledge with new insights to enhance the understanding of the phenomena (Creswell et al. 2010:117). This was done during the data analysis phase.

3.6.3 Document reviews: qualitative data

Creswell et al. (2010:82-83) distinguish between the literature review of a study and documents as part of the gathering of data strategy. The literature review provides an overview of scholarship in a specific discipline through trends and debates and provides past and current research on a topic. Documents as a data gathering strategy is focused on all types of institutional written communications that may shed light on the phenomenon being studied. The documents are referred to as primary sources as they are original source documents which may or may not be published and include reports, memoranda, agendas, administrative documents, email messages, faxes and newspaper articles. Secondary sources refer to books, journal articles and other published works. The researcher needs to evaluate the authenticity of the published works.

Documents that were examined pertained to the development of Library middle managers within the case that is being studied. These are documents from the ODL institution's Human Resource Department responsible for staff development, and documents on this

topic available in the Library. They include policies, institutional operational plans and strategic documents of the institution and its ODL Library; job descriptions of the Library middle managers which stipulate the required competencies of middle managers in an ODL institution. A list of these documents is attached to the Interview protocol.

These provided insight into the institution's views with regard to ODL Library development and the possibilities when a way forward needs to be considered. Yin (2009) advises that these documents are examined to corroborate and augment evidence from other sources.

3.7 DATA ANALYSIS STRATEGY AND PRESENTATIONS OF RESULTS

In terms of the purpose of the study's conceptual framework, according to Imenda (2014:192) the framework helps the researcher to see the main variables and concepts in the study and provides research interpretation and explanation of data where no dominant theoretical perspective exists. It also guided future research when the researcher integrated data from the literature review with field data. The research design and analysis could therefore not be considered separately from the approach followed in a research study.

The findings were analysed and then explained in terms of the aims for collecting data as outlined above. The findings flowing from the analysis of the survey questionnaire revealed the perceived 'what' in terms of the importance and use of identified factors and strategies as facilitators on the successful career path of Library middle managers; whereas the findings flowing from the analysis of qualitative data collected during interviews revealed 'how and why' these factors and strategies should be applied; and qualitative data collected from institutional documents revealed answers to 'who, when and where' questions. Data collected from the respective data sources through triangulation resulted in findings from different perspectives which is an outcome of the purpose of triangulation.

Since data collection methods with complementary strengths and non-overlapping weaknesses were chosen for this study in the form of triangulation, the research questions were used to drive the study. In this study, the focus was particularly on 'what, how and why' and 'who, when and where' questions. The three approaches have different objectives, data sources and analytical methods. Jack and Raturi (2006:351) allude to the importance of such an approach where different data sources and analytical methods contribute to the findings of a study.

For the quantitative part of the investigation, data was pre-coded and for the qualitative data, coding was done after the data collection phase. Relationships between variables were studied to find a solution to the research problem. Evidence was collected from both quantitative and qualitative data sources. Creswell et al. (2010:100) allude to the fact that the researcher will approach the data analysis through an appropriate data analysis strategy. A brief discussion of the data analysis strategy and related procedures follows. Chapters Four and Five will then refer to the strategy explained in this chapter, Chapter Three, but will not again elaborate on the strategy.

3.7.1 The planned strategy of quantitative data analysis

In conjunction with the design of the closed ended-questionnaire discussed in section 3.6.1, research argued that an analysis strategy had to be developed that would best facilitate answering the research questions of the study while considering the assumptions made in this research. Therefore the analysable variables probed in the questionnaire, the assumptions made by this research (section 1.4.3) and the research questions of this study are considered in the three subsections that follow:

(i) The variables evaluated in the questionnaire

To recap, the identified concepts of relevance to career advancement (identified in the literature and evaluated in the questionnaire) include:

- the concept of career success
- external factors that impact on success; appointment contributors such as qualifications
- development strategies
- internal development factors
- career development strategies
- competencies

These concepts were evaluated in the questionnaire for perceived importance and perceived personal success. These concepts were evaluated in such a way that perception measures could be created.

In addition to the career advancement concepts, the biographical properties (variables) of respondents were also probed, namely age, number of job changes, gender and home

language. Table 9 below indicates the variables probed in the questionnaire and the variable measurements to be collected/ or derived during planned questionnaire administration.

Table 9: Variables included in the questionnaire and collected variable measurements

Career advancement-related concept and variable	Data type depending on category selection or response perception (importance/ personal success)	questionnaire question
Research contextualising variables • age; job changes; gender; home language;	• categorical/ class data	• q2; q3 q4; q5; q6
The concept of success	importance personal success	• q7 • q8
The concept of development strategies that affect career advancement • Qualifications • Appointment contributors • Other strategies • Development needs • Continued development • Use continued development	• # qualifications • importance rating • # strategies • importance rating • importance rating • personal success	• q9 • q10 • q11 • q13 • q14 • q15
The concept of external factors	• importance rating	• q12
The concept of internal factors	• importance rating	• q16
Competencies • Communication • Planning • Teamwork • Strategic • Globalisation • Emotional intelligence • Other competencies • Successful re competencies	• importance rating • personal success	• q17 • q18 • q19 • q20 • q21 • q22 • q23 • q24
Importance- and success rating indicated in column 2 of this table would consist of 5-point Likert rating scale values. Responses to the biographical variables consist of option choice between age-, or gender categories. This illustrates that the to-be-collected data would be categorical data.		

The table above not only lists the variables to be included in planned analysis, but also indicates data-type that further guides the design of an analysis strategy: techniques considered should be appropriate for categorical data analysis since the to-be-collected data would be categorical.

(ii) Career concepts identified in previous research

As explained in section 1.4.3, the findings of previous research with regard to successful career concepts led to the format of the questions, evaluated in this study on a five point Rikert scale (critically important to irrelevant ratings and not successful to very successful)

that probed perceived-importance or personal success of previously identified career-success concepts.

(iii) The research questions of the study

Additionally, the analysis strategy designed to analyse the to-be-collected data should be designed to effectively answer the research questions in terms of the following:

- *How do ODL Library middle managers view success?*
- *How important are external factors and development strategies in facilitating the successful appointment of ODL Library middle managers?*
- *How important are factors and strategies for an optimal career path of library middle managers? Here the sub-research questions ask the following:*
 - *How do middle managers perceive the importance of internal/external factors on career success?*
 - *What are the importance-perceptions of middle managers of identified career development strategies on career success?*
 - *What are the importance-perceptions of middle managers of identified competencies on career success?*

Set against this background, an analyses strategy is set out below in the next subsection. The strategy briefly indicates the various analyses to be performed and also explains the purpose of each technique. Furthermore, the results of analyses – once the strategy was implemented on collected data - are then presented in chronological order of this strategy in Chapters Four and Five.

3.7.1.1 Data analysis: quantitative data

In summary, the following analysis steps were followed:

- (i) Data verification Ngulube (2005)
- (ii) Contextualisation of the study
- (iii) Introduction of the career-success constructs: exploratory analysis
- (iv) Verification of the internal consistency reliability of career-construct measures
- (v) Calculation of perception measures of factors and strategies and tables of perception mean scores.

(i) Data verification

A component of data verification consists of verifying that all data responses electronically captured fall within the allowable value-range for each questionnaire statement of the questionnaire. For example, responses to 'gender', question 3, should only report either values of 1 or 2 – therefore a value range of 1 to 2. All categorical-response questions of the questionnaire were therefore programmatically tested for a permissible value range for each question (q1-24). An "error" will programmatically be picked up and indicated as an incorrect/ mistyped response. Such an incidence can then be either rectified (if possible) or ignored (made 'missing') in further analysis.

(ii) Contextualising the study

In order to contextualise the study, exploratory one-way frequency tables on biographical properties were used. Research reasoned that one-way frequency tables of the biographical properties of university site; age; job changes; gender; home language; qualifications (q1-q6, q9 of the questionnaire) would serve to describe the context of the research and form the background against which further analysis of results should be understood and interpreted. Apart from describing the background, these frequency distributions would also serve to identify categories of the biographical variables that are not well represented by the to-be-sampled participants. Identification of such categories would enable research to exclude or condense categories of identified variables to representative categories before conducting further analysis that involves these variables.

(iii) Introduction of career success constructs: exploratory analysis

Composite one-way frequency tables for the concepts of career success, internal factors, external factors, strategies and competencies were used for the exploratory analysis to introduce career success constructs. Composite one-way frequency tables over either the importance rating-levels or the personal success-experience rating levels for each of the components (of the *career path concepts of career success; external factors; internal factors; strategies and competencies*) were planned. The composite frequency tables consisted of one-way frequency distributions for each statement of the subset of questionnaire statements that group together to explain a career-success concept, for example, communication competency. The purpose of these tables was to introduce the concepts to the reader (and the elements that describe a particular construct) as well as to

gain an initial overview of how respondents in general perceive these concepts: their perceptions of either the success-impact of these concepts in the ODL environment, or their perceived personal experience of success regarding these constructs.

The tables firstly assisted in evaluating whether participants in general perceived the concepts to be important to career advancement or whether they personally perceived to be successful. (Values closer to '1' indicate highly important (or feelings of being most successful), while values closer to '5' indicate irrelevant to career success (or personal feelings of not successful at all)).

Secondly, a comparison between individual response patterns within a table also indicated whether all aspects of, for example, the concept of internal factors were perceived as equally important (or successful) or whether more attention, within the ODL environment, was attributed to specific aspects of a success concept. A Chi-square test statistic, calculated over the frequency response patterns of a specific composite table, served to verify perception-pattern differences.

(iv) Verification of the internal consistency reliability of career-construct measures

Once the background of the research had been sketched and the success concepts introduced, research argued that the internal consistency reliability of the various success concepts had to be verified to justify the calculation of perception measures of perceived importance of perceived success for career advancement constructs. These related to the success concepts of: strategies (performance-, development strategies, application of strategies), internal factors and competencies. Scale reliability testing was done to determine the reliability thereof. Internal consistency reliability verified that each set of responses to a group of questions (that are designed to describe a specific construct - for example, communication competency) truly contributes towards explaining the construct. If this could be verified, the deduction could be made that a measure of importance perception (or perceived personal success) calculated for a specific concept (calculated as the mean rating response to all questions that describe the specific concept, for each participant) would represent a reliable measure of how participants perceived a specific career concept (for example, internal factors).

Internal consistency reliability was established by means of scale reliability tests. The tests were conducted on the various subsets of participant responses to the group of questions that describe a career-success concept. As part of the analysis, a coefficient, referred to as the Cronbach alpha coefficient was calculated. If the value of the Cronbach alpha coefficient was in the region of 0.7 or greater than 0.7, internal consistency reliability for the specific concept had been verified. In such instances research was then justified to calculate measures of participants' perceived importance or perceived success regarding a career-success concept.

(v) Calculation of perception measures of factors and strategies and tables of perception mean scores

This related to the calculation of importance-perception or experienced success-perception scores and mean perception scores for the concepts of strategies (performance-, development strategies, application of strategies), internal factors and competencies. Once it had been verified that career concepts exhibit internal consistency reliability, perception scores for

- strategies (performance-, development strategies, application of strategies)
- internal factors
- and competencies

could be calculated for each respondent as the mean rating value for the subset of questions that described the particular concept.

Using the sets of calculated scores for all participants, mean career concept scores could be calculated for the entire sample as well as for subsets of the sample (for example, gender groups or age groups). Calculated means then served as a quantitative indication of how participants and groups of participants perceived the importance/ or their personal success-attainment regarding the various career success concepts.

This analysis strategy enabled the researcher to answer to the research questions stated in the introduction section of the analysis strategy.

In summary, the sequence of discussions of analysis results that are presented in Chapters Four and Five to follow will be presented in the same sequence as the analysis

strategy detailed above. The table that lists the variables analysed will be presented in Chapters Four to remind the reader of the analysis strategy sequence.

3.7.2 The planned strategy of qualitative data analysis

A second data analysis strategy pertained to data collected through interviews and institutional documents. Creswell et al. (2010:99-100) state that the qualitative data analysis is developed from the information supplied by the participants. In this study qualitative data pertained to responses to questions posed in accordance with the interview protocol (Appendix 11). The protocol was based on the research questions that guided the study and variables explained in section 3.7.1.1. Through these questions the investigator was often referred to institutional documents, which led to the analysis of this content, in addition to content analysis of data collected through interviews. Also, responses to open-ended questions in the survey questionnaire were analysed. These pertained to open-ended questionnaire questions 7, 8, 9, 11, 12, 14 and 16. Creswell et al. (2010:101) explain that this is a systematic approach which summarises message content and analyses, and qualitative responses to open-ended questions collected through surveys and interviews. It provides an opportunity to consider the data from different angles with a view to identifying keys in the text that may assist with data interpretation.

3.7.2.1 Data analysis: qualitative data

Creswell et al. (2010:103 -104) provide a generic data analysis process consisting of five steps as follows:

- Describe the sample and participants
- Organise the data
- Transcribe the data
- Get to know your data
- Save your data

The analysis strategy for qualitative data aligns with the above strategy which was designed to analyse the quantitative measurable data type, since it was designed in such a way that it could answer the research questions stipulated above.

The presentation of qualitative data included the key themes, commonalities and differentiators. Creswell et al. (2010:99) state that qualitative data analysis tries to

establish how participants make meaning of a specific phenomenon by analysing their perceptions, attitudes, understanding, knowledge, feeling and experience in an attempt to approximate their construction of the phenomenon. Through this research method, the data analysis process consists of noticing, collecting and reflecting. The three elements are interlinked as gaps may be noticed in the data that need to be collected. Creswell et al. (2010:117) allude to the fact that data gathering and analysis must be trustworthy, meaning that the findings must be contextualised within the existing body of knowledge on the topic and indicate how it corroborates the existing knowledge with new insights to enhance the understanding of the phenomena.

In the case of this study, the analysis strategy for qualitative data was also planned according to the research questions of the study, with a focus on responses received from 'why and how' questions indicated in the interview protocol (Appendix 11). The strategy included the analysis of responses to open-ended questions as part of quantitative responses collected via the survey questionnaire; and data collected through interviews and institutional documents guided by an interview protocol. Themes used to collect quantitative data were success dimensions, external factors and strategies that lead to the appointment of middle managers, and internal factors and development strategies, including competencies that optimise the career path of ODL Library middle managers. After the data was cleaned as described in section 3.7 above, qualitative data collected through interviews and institutional documents could be analysed. The focus of the analysis was identifying themes and keys in the text to guide the data interpretation.

Whereas the analysis of the qualitative data collected from interviews revealed answers to 'how' and 'when' questions, institutional documents revealed answers to 'who, when and where' questions that relate to the research questions of the study. This provided further insight to the institution's thinking on development in general and more specifically with regard to factors and strategies that can be applied to advance ODL Library middle managers. The institutional documents were used to corroborate and augment evidence from other sources.

The data analysis principles which this study adhered to are stated by Rowley (2002:24). It is accentuated that there is no fixed procedure for the analysis of case study results but that the case study should adhere to four principles, namely that it should use all evidence; rival interpretations should be considered and explored; the analysis should address the most significant aspects of the case study and the analysis should draw on the

researcher's expert knowledge, but in an unbiased manner.

3.7.2.2 The role of the researcher in qualitative research

In the case of qualitative research, the researcher is the primary instrument for data collection and analysis (Meriam 1998). Although the researcher of this study was in a position to collect and interpret the data exactly as it is presented, misinterpretations may occur as a result of the researcher's personal bias. The following details of the researcher were therefore provided with a view to demonstrate the researcher's involvement in middle management and leadership development and the person's need for an understanding by ODL institutions in terms of the combination of development factors and strategies, including the development of competencies that lead to a successful career path for ODL middle managers. A brief description of the researcher's recent involvement in research is also provided.

The researcher has vast experience in library management as she served for 12 years as a senior librarian responsible for the supervision of approximately 40 South African departmental government libraries, known as special libraries; and thereafter she worked as Director in the ODL Library of the University of South Africa for twenty-five years. She was responsible for a large Directorate with more than 100 staff members, 3 managers and 10 supervisors. She was a member of the ODL Library's Executive Committee consisting of six persons, and member of the Library's Management Committee consisting of 30 persons. Her primary role was the directing of one of the ODL Library's four directorates. Within her Directorate she was Chair of the Management Committee where she worked closely with the deputy director, managers and supervisors.

Within the ODL institution, the researcher was a member of the ODL institution's Senate Library Committee and a member of the Professional and Administrative Research Committee (PARC). The researcher was also appointed as a supervisor and co-supervisor respectively of two Masters students enrolled at the ODL institution's Department of Library and Information Science.

On the national level, the researcher is a member of the Library and Information Association of South Africa (LIASA) and participates actively in the LIASA Higher Education Libraries Interest Group. In 2011 and 2013, the researcher was the Chair of the Organising Committee of the first and second African Library Summits held for high level decision-makers, policy-makers and heads of libraries in Africa with a view to debate the

development of library services and the development of leadership in Africa. The researcher is a co-editor of two books flowing from respectively the 2011 and 2013 African Library Summits. The first book was published by KnowRes publisher in 2014 with the title *The horizon and beyond*; and the other was published in 2016 by Unisa Press with the title *The new African librarian*.

On the international level, the researcher is a member of the International Federation of Library Associations (IFLA) Standing Committee for Inter-library Loans and Document Supply responsible for the management of resource sharing practices worldwide. In this regard, she has presented papers at IFLA conferences and has published articles in accredited journals. In 2015, the researcher published one peer reviewed article and co-authored another in the journal, *Interlending and Document Supply*. In 2014, the researcher was appointed as an editorial adviser for the *Interlending and Document Supply* journal, an established internationally accredited journal (ISSN 0264-1615CMCB UP Limited).

It was believed that the researcher's research experience would contribute positively towards a study on middle management development. The researcher's philosophy towards management development is that it is essential that middle managers be developed in order to cope in the workplace and that this is only possible if the needs of aspiring managers are understood before and after the appointment through the establishment of a model for middle management development.

In order to reduce possible personal bias, open-ended, non-leading questions, which do not influence the respondent to give a certain response and which are structured beforehand, were provided to participants in the survey questionnaire. This data was collected by an independent person and then captured and presented word for word as submitted on the questionnaire (Mouton 2010:103). Transcriptions from interview recordings were also made by an outside company and the correctness thereof was verified by participants. The data was cross-checked by a person who signed the intercoder agreement to check codes allocated by the researcher. This serves as an explanation and shows how the competence of the researcher and actions implemented to eliminate bias contributed to the validity of the study.

3.8 EVALUATION OF THE RESEARCH METHODOLOGY

Literature in support or rebuttal of the research methodology was analysed to find the most appropriate methodology for this study. This case study design, which triangulates data collection methods, benefitted the study in terms of its purpose. The methodology was applied to generate knowledge in order to understand what drives ODL Library middle managers towards success and what factors and strategies influence the successful career path of ODL Library middle managers, why it is considered a facilitator of ODL Library career advancement and how it could be implemented. In accordance with the study's conceptual framework, the study encompasses a literature study and empirical research, with a quantitative survey questionnaire to collect quantitative data, and case study interviews and institutional documents to collect qualitative data.

In evaluating the quantitative methods applicable to the study, the sources of data were primarily responses to quantitative questions which formed the basis for a further investigation. Once the identified development factors and strategies in the literature were investigated and the perceived importance thereof determined, this strategy could be followed by case study research with interviews during which qualitative questions could be posed which led to qualitative responses; and related institutional documents could be examined in order to collect qualitative data from these sources. This was deemed crucial as one source of information could not provide adequate information. Data collected from one method could help to inform the results from another method.

The triangulation of data sources was regarded as the most appropriate data collection strategy in terms of these benefits. The case study benefitted also from literature used to develop the constructs of the survey instrument which later guided the case study. This design allowed a sequential data collection approach to collect qualitative data which indicated 'how and why' the selected development factors and strategies were important. The different data provided an analysis of the research problem as it first pointed out what was important in terms of the development of ODL Library middle managers before the researcher could gain clarity on responses to open questions in the quantitative study and to gain more information through interviews and institutional documents. The way in which one form of data complimented another data collection procedure made it possible to analyse responses to questions posed to all middle managers and to middle managers

operating at different management levels in an organisation, since the collective group of middle managers included first level managers (supervisors), managers, deputy directors and directors respectively. The information is interpreted in the overall results.

This is an in-depth investigation of the phenomenon in a short time in order to learn from the findings.

3.9 CHAPTER SUMMARY

In summary, this study falls within the positivism meta-theoretical tradition in social science. The paradigm which directs this study best is post-positivism, as knowledge will be claimed scientifically on the basis of empirical evidence. The strategy of enquiry pertains to an approach relating to the triangulation of data sources and the research purpose was to explore a new topic with a view to describe and explain it.

This chapter describes the empirical study conducted to assess factors and strategies that facilitate the development of library middle management in an ODL environment successfully. It explains the research design and methodology, which involves a case study with triangulation of different data sources of information; and aims to investigate contemporary phenomena within a real-life setting. Important aspects relating to the empirical research is its approach to data collection, the time dimension, population and approach to data analysis. The use of a web-administered questionnaire and related data collection tool (SurveyMonkey), as well as the interview method and the review of primary documents, are discussed. This chapter forms the basis on which the statistical findings of the study and the interpretations of the captured data are presented and reported in Chapters Four and Five.

CHAPTER FOUR: PRESENTATION OF RESULTS AND FINDINGS

4.0 INTRODUCTION

Chapter Four is concerned with the presentation of results which were collected from the multiple sources of evidence. These are results from a questionnaire which was distributed to the entire group of middle managers working in the only ODL Library in South Africa, the findings from qualitative data collected during interviews with a selected group of ODL Library middle managers and from institutional documents relevant to this study. The results of quantitative data presented in the empirical research originated from responses to both closed-ended and open-ended questions. The closed-ended questions reflect the statistical part while the open-ended questions reflect the descriptive parts as part of qualitative findings. Qualitative data presented in the empirical research originated from responses to open-ended questions in accordance with the interview protocol of this study; and from content analysis of institutional documents. The operationalisation reflects the translation of the concepts in this study to the questions. The presentation of data flowing from the multiple sources of evidence, which were collected for this case study, was guided by four broad themes. These themes relate to the empirical research question, namely 'What influence the successful career path of Library middle managers in an ODL institution' and related research questions.

What dimension of career success is perceived by ODL Library middle managers as important?

What development strategies facilitate success on the employment pathway of ODL Library middle managers?

What factors facilitate success on the employment pathway of ODL Library middle managers?

What are the attitudes of ODL Library middle managers towards identified competencies?

This led to the results and findings being presented in an organised manner.

The first part of Chapter Four presents information on the collection of quantitative data for this study. It reflects on the response rate, data reduction and processing of the data phase. This is followed by the presentation of the quantitative results flowing

from the closed-ended questions in the survey questionnaire.

The second part of the chapter reflects the qualitative element based on the descriptive parts collected from open-ended questions in the survey questionnaire (questions 7, 8, 9, 11, 12, 14, 16); as well as qualitative data collected during interviews and through an analysis of institutional documents.

4.1 QUANTITATIVE DATA: QUESTIONNAIRE

Data pertaining to the quantitative results was collected by means of a questionnaire from participants who operate in four directorates of the ODL Library on different management levels within the ODL Library's hierarchy. The presentation that follows provides details on the response rate, details of the respective language groups who provided informed consent to participate in the survey questionnaire and the presentation of quantitative results.

4.1.1 Response rate

Upon return of all 38 questionnaires, they were checked to ensure that they were completed to the end. It was noted that a 94,7% response rate was reached since only two questionnaires were not fully completed. Gideon (2012:55) alludes to the fact that in the case of survey research where a questionnaire is sent to the population, the response rate should be as high as possible to reduce errors. A 70% or higher response rate is considered appropriate. Gideon (2012:73) further states that the response rate depends on the type of survey method used. In survey research, a self-administered survey method has normally the lowest response rate compared to face- to- face surveys and telephone survey methods. However, in the case of this self-administered web survey method, 38 of 38 elements participated in the survey. Of these, 36 of 38 questionnaires were completed, with the exception of a few cases where some questions or sub-questions were not fully answered. Seven open-ended questions of the nine open- ended questions in the questionnaire were completed. Of the seven, one was unusable as the sentence was not completed. A total of 20 of the 36 participants responded to these open-ended questions. The response rate of this research study exceeded the appropriate response rate by far if considered against the appropriate response rate of 70% indicated by Gideon

(2012:73) or that of Kittleson and Brown (2005:11), who indicate that a 40-50% response rate may be considered outstanding. The response rate to the open-ended questions in the questionnaire was 52.63%. In this regard, the respondents were encouraged to provide additional information if they had any.

Table 10 contains a summary of the response rate of completed questionnaires.

Table 10: Response rate of completed electronic questionnaires

Respondents	Total number of respondents to closed-ended questions	Total number of respondents to open-ended questions
Response rate: Completed questionnaires	38 (100%)	20 (52.63%)
Rejected questionnaire	2 (5.26%)	2 (5.27%)
Total responses	36 (94.74%)	18 (47.36%)

The high response rate can be ascribed to a number of principles which increased the co-operation. Gideon (2012:76-77) states that these are civic duty (an appeal stating 'it will really help us'), reciprocity (return a favour to someone you work with), scarcity (it is viewed as a limited opportunity which is valuable if the survey is sent to a selective group for a short period), legitimate authority (the legitimacy of the requestor is judged), consistency (individual respondent expresses a view that supports participation) and sensitivity to negative consequences. It is also a fact that more people will participate if it personally appeals to their interest and values. Gideon (2012:77) states that another principle which leads to co-operation is the importance of tailoring the request for participation to the respondent's needs, interests or values. This was borne in mind particularly during the construction and layout phase of the questionnaire with a view to ensure that participants stay interested in participation until the last question. All these principles might have had some impact that contributed positively to the high response rate of the study. Other efforts that might have influenced the high response rate is the fact that before the questionnaire was distributed, the researcher determined the availability of the population and identified a time during which all members would be available, before it was distributed.

A methodology for testing and analysing the research data, which was extracted

from the 36 usable questionnaires, was designed in accordance with the study's requirements by a research specialist who is employed by the ODL institution's research unit to assist doctoral students with the analysis. Statistical analysis was conducted with the aid of a Statistical Analysis System, version 9.4 which is a statistical software package (Statistical Analysis System Institute, 2013a; 2013b).

This could only be done if informed consent was provided by the relevant middle manager. However, informed consent to participate in the survey questionnaire was provided by all the respective ODL Library middle managers.

Figure 3 depicts responses received from the respective language groups in the ODL Library who provided informed consent.

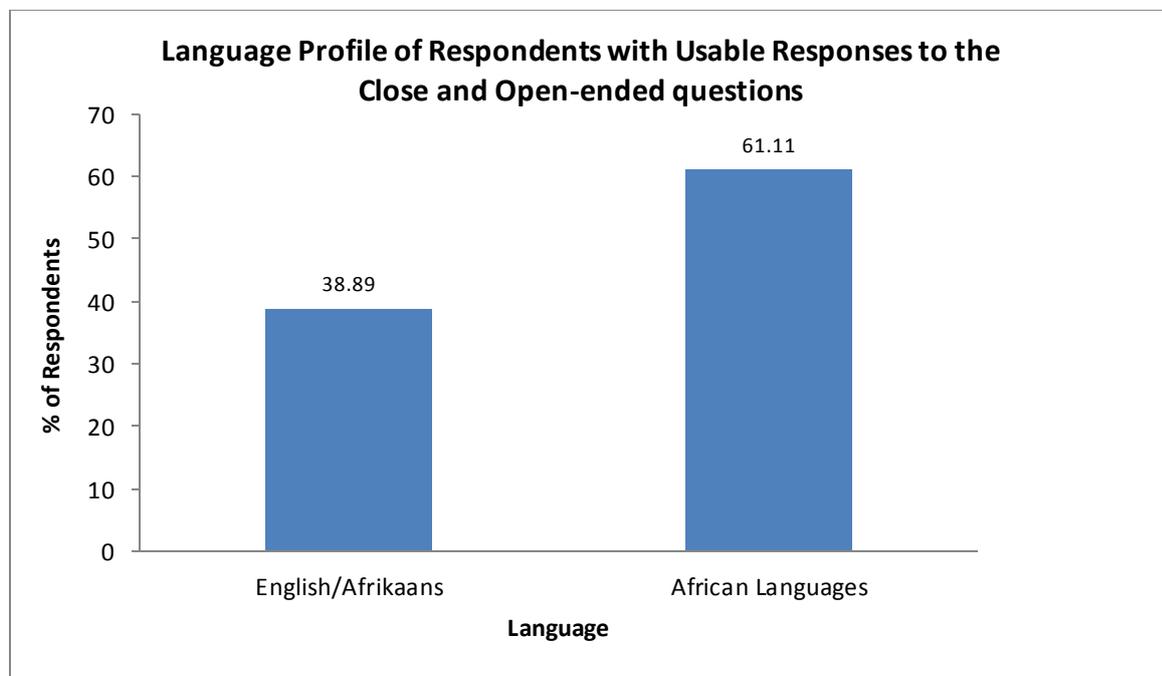


Figure 3: Informed consent and responses received from the ODL Library's language groups

4.1.2 Presentation of quantitative results

The results presented in this chapter (and in Chapter Five) indicate the application of the analysis strategy presented in Chapter Three, section 3.7 including the summarised steps (section 3.7.1.1). The presentation of quantitative results includes a discussion on how the data integrity was tested; followed by presentations of the contextualisation of the study; participants' definition of success and evaluation of

their own success; as well as participants' perceived importance of selected factors and development strategies, including competencies on the career path of ODL Library middle manager and the evaluation of their own success.

As a prelude to the statistical analysis data integrity was programmatically verified by checking that participant responses to questionnaire questions fell within the allowable response range for each question. For example, in Tables 12a, 14a, 16a, 18a, 20a, 21a, 28a, 29a the frequencies for every allowable response level for all relevant variables are reported (such levels would for instance be the four language categories for the home language variable namely, 1: African, 2: English, 3: Afrikaans, 4: Other). If a participant response outside the allowable range is reported for a particular variable (for example, a value of '7' for the home language variable), this would indicate to an incorrect/ unreliable participant response or to incorrect data capturing which can then be traced back to the questionnaire and rectified or removed from the data. In this way another aspect of data integrity, namely accurate capturing was verified.

The analysis strategy presented in Chapter Three is now further implemented through the presentation of results in accordance with a specific sequence.

4.1.2.1 Sequence of presentation of quantitative data

In this chapter, Chapter Four, the results are presented in tables, each table with an introductory description. In some cases, figures are presented in addition to the tables, when it was required to point out the rating categories with visual explanations which reflect the value of the rating averages.

The sequence of the presentation of the results that are presented in Chapter Four will be presented in the same sequence as the analysis strategy for quantitative data detailed in Chapter Three. The table that lists the variables is again presented in Chapter Four to remind the reader of the analysis strategy sequence. Table 11 contains the sequence pertaining to the analysis strategy as well as the respective tables which reflect the results. The results that are presented in Chapter Four and Five are indicated in Table 11 with the numerical number four or five (indicating that the Table is presented in Chapter Four or Five) next to the table number in the last

column. Table 11 contains the legend of the analysis discussion consisting of the career advancement concepts and variables discussed in the Chapter Three analysis-strategy, and subsequent analysis results-tables reported in Chapter Four and Five.

Table 11: Legend of analysis discussion

Career advancement-related concept and variable	Data type depending on category selection or response perception (importance/ personal success)	questionnaire question	Tables in Chapter Four and Five that presents the results of the implemented analysis strategy
Research contextualising variables : Age; job changes; gender; home language	Categorical/ class data	q2; q3; q4; q5; q6	Table 12 (4) Table 12a(5)
The concept of success	<ul style="list-style-type: none"> • importance • personal success 	<ul style="list-style-type: none"> • q7 • q8 	Table 13 (4) Table 14 (4) Table 14a(5)
The concept of development strategies that affect career advancement <ul style="list-style-type: none"> • Qualifications • Appointment contributors: experience • Appointment contributors: approaches • Development needs • Continued development • Use continued development strategies 	<ul style="list-style-type: none"> • # qualifications • importance rating • # strategies • importance rating • Importance rating • personal success 	<ul style="list-style-type: none"> • q9 • q10 • q11 • q13 • q14 • q15 	<ul style="list-style-type: none"> • Table 15(4) • Table 16(4) • Table 16a(5) • Table 17(4) • Table 18(4) • Table 18a(5) • Table 19(4) • Table 20(4) • Table 20a(5)
The concept of external factors	<ul style="list-style-type: none"> • importance rating 	<ul style="list-style-type: none"> • q12 	<ul style="list-style-type: none"> • Table 21(4), • Table 21a(5)
The concept of internal factors	<ul style="list-style-type: none"> • importance rating 	<ul style="list-style-type: none"> • q16 	<ul style="list-style-type: none"> • Table 22(4)
Competencies <ul style="list-style-type: none"> • Communication • Planning • Teamwork • Strategic • Globalisation • Emotional intelligence • Successful use of competencies 	<ul style="list-style-type: none"> • importance rating • personal success 	<ul style="list-style-type: none"> • q17 • q18 • q19 • q20 • q21 • q22 • q24 	<ul style="list-style-type: none"> • Table 23 (4) • Table 24 (4) • Table 25 (4) • Table 26 (4) • Table 27 (4) • Table 28 (4) • Table 28a (5) • Table 29 (4) • Table 29a (5)
Importance- and success rating indicated in column 2 above would consist of 5-point Likert rating scale values. Responses to the biographical variables consist of option choice between age-, or gender categories. This illustrates that the to-be-collected data would be categorical data.			
Scale reliability test: first to include in Chapter Five before presenting the tables of means – Table 12a (5)			<ul style="list-style-type: none"> • Table 14a (5) • Table 16a (5) • Table 18a (5) • Table 20a (5) • Table 21a (5) • Table 28a (5) • Table 29a (5) • Table 31 (5) • Table 32 (5)

4.1.3 Contextualising the study

Table 12 contains demographic information pertaining to the participants, namely the library where employed; number of job changes; gender; age; and language groups based on the participants' home language. The results indicate that of the nine official languages in South Africa, 38.89% of the respondents to the closed ended questionnaire use English/ Afrikaans at home and 61.11% of the respondents use the other official African languages at home. The age distribution of participants was such that 61.11% of middle managers fell into the <51 years age group and the remaining 38.89% of middle managers into the above 50 years of age group.

Table 15 indicates that 32.79% of participating middle managers held an honours qualification in LIS while an additional 27.87% (6.56% + 6.56% + 14.75%) held at least a bachelors' or library diploma or bachelors plus post graduate library diploma. No formal ODL qualification was reported.

A visual presentation of these details is also depicted in Figure 4 (number of job changes), Figure 5 (age group profile) and Figure 6 (language groups).

It will be observed that for the biographical variables of *age, home language and number of job changes* reported in Table 12, age-, job changes- and language groups are indicated by means of shading. This was done to indicate how - in more advanced analyses still to be discussed in Chapter Five - perception means were classified against biographical properties in the means tables reported on in this analysis description.

Table 12: Characteristics of the participants

Frequency distributions of the biographical properties of respondents, which include library job changes, gender and home language) (Number of participants that indicated willingness to participate, N = 36)				
Library employed (q0002)				
q0002	Frequency	Percent	Cumulative Frequency	Cumulative Percent
Muckleneuk	28	77.78	28	77.78
Regions	8	22.22	36	100.00
Number of job changes (q0003_0001)				
0	3	8.33	3	8.33
1	8	22.22	11	30.56
2	6	16.67	17	47.22
3	5	13.89	22	61.11
4	6	16.67	28	77.78
5	3	8.33	31	86.11
6	2	5.56	33	91.67
7	2	5.56	35	97.22
8	1	2.78	36	100.00
Gender (q0004)				
Female	26	72.22	26	72.22
Male	9	25.00	35	97.22
Prefer not disclose	1	2.78	36	100.00
Age group (q0005)				
31-40	1	2.78	1	2.78
41-50	21	58.33	22	61.11
51-60	8	22.22	30	83.33
60+	5	13.89	35	97.22
Prefer not disclose	1	2.78	36	100.00
Home language (q0006)				
Afrikaans	10	27.78	10	27.78
English	4	11.11	14	38.89
N Sotho	10	27.78	24	66.67
S Sotho	1	2.78	25	69.44
Swazi	1	2.78	26	72.22
Tswana	3	8.33	29	80.56
Venda	1	2.78	30	83.33
Zulu	6	16.67	36	100.00

Figure 4 below depicts the number of job changes of the participants who responded to the questionnaire. The legend indicates the number of job changes.

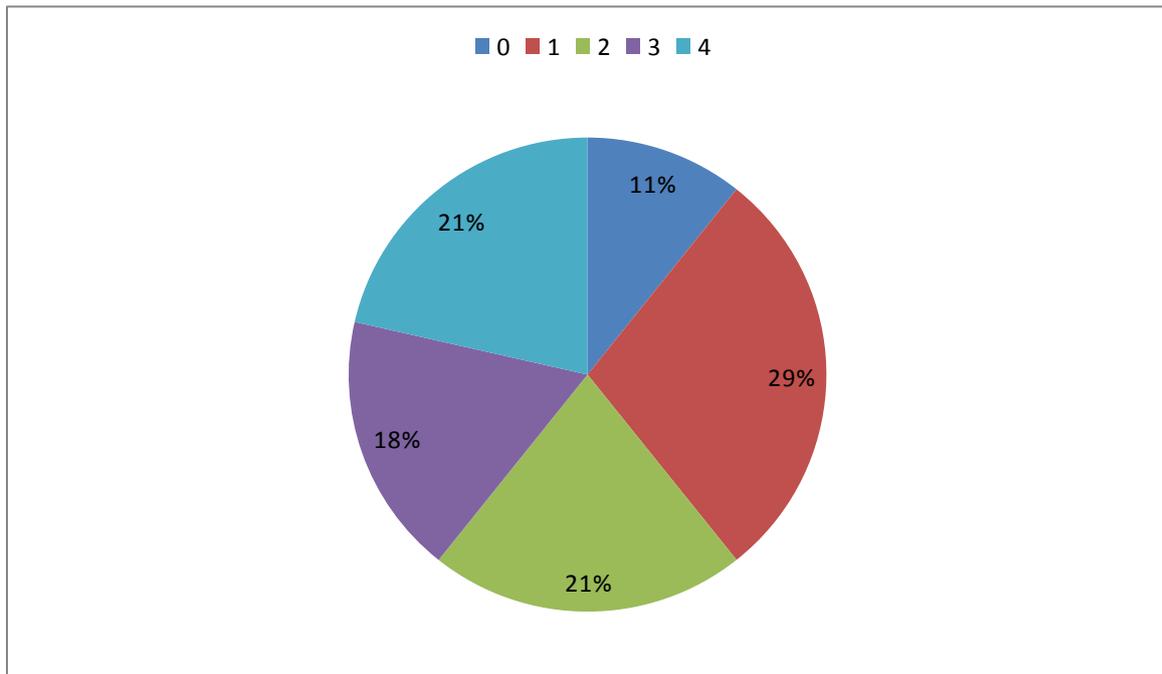


Figure 4: Number of job changes

The figure below, Figure 5, depicts the age group of the participants who responded to the questionnaire. The legend indicates the age categories.

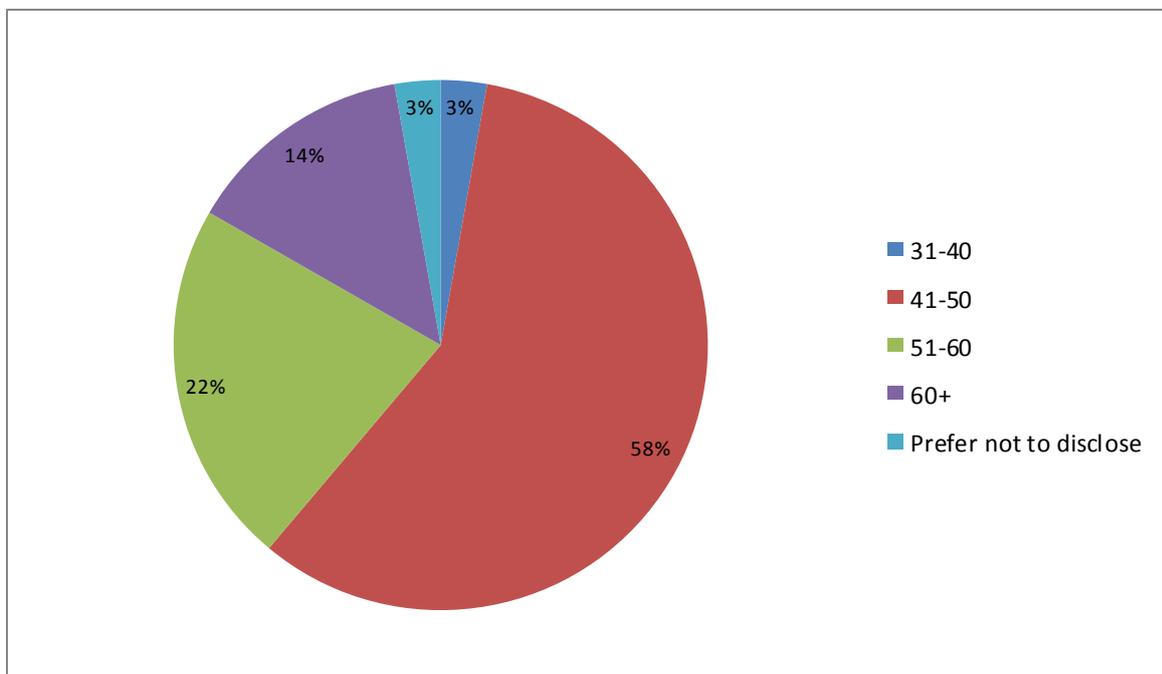


Figure 5: Age group profile of respondents

The figure below, Figure 6, depicts the language diversity of the participants who responded to the questionnaire. The legend indicates the language groups in the ODL Library.

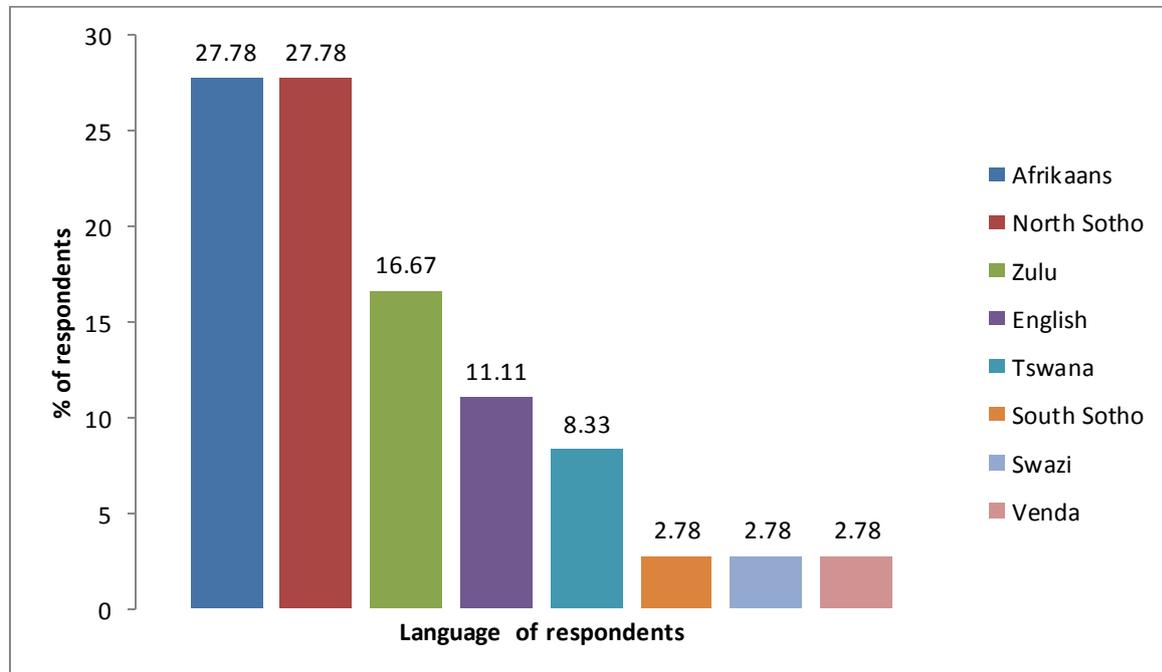


Figure 6: Language profile of respondents (Relative frequencies expressed as percentage)

In the following part of Chapter Four, results flowing from the quantitative responses of participants are presented in accordance with the questionnaire questions which reflect the research questions.

4.1.4 Concepts of success

The purpose of Questions 7 and 8 is to investigate the dimensions of career success. Quantitative data of the success concepts are included in Table 13 and Table 14. Table 13 reflects on what ODL Library middle managers understood success to mean, in terms of criteria for success described in the literature. The last row of Table 13, the row of totals, indicates the premium on the success criteria placed by respondents in general. The closed-ended questionnaire results are reported in Table 13.

Table 13: How do respondents define success?

Question 7: how respondents define 'success'						
Success definitions	Importance levels					
Frequency Row Pct	Critically important	Important	Neutral	Not important	Irrelevant	Total
Advancement in the hierarchy	5 14.29	13 37.14	9 25.71	7 20.00	1 2.86	35
Respect received due to competency	11 33.33	13 39.39	3 9.09	5 15.15	1 3.03	33
Positive impact of a person's work	22 64.71	12 35.29	0 0.00	0 0.00	0 0.00	34
Work life/ personal life balance	17 48.57	13 37.14	4 11.43	1 2.86	0 0.00	35
IPMS assessment rating	7 20.00	10 28.57	10 28.57	5 14.29	3 8.57	35
Total	62	61	26	18	5	172
Frequency Missing = 8 Fisher's exact probability of (Chi-square statistic having the value of 45.73 under the null hypothesis that frequency patterns for success criteria are similar) < 0.0001***						

Table 14 below reports on how respondents measure their own success against these criteria. The last row of the table, the row of totals, indicates the respondent's perception in general on how they measure up to set, perceived expectations in all respects. The closed-ended questionnaire results are reported in Table 14.

Table 14: Respondents' perceptions: own success measures against success definitions

Question 8: Respondents' perceptions of their own success measures against the success definitions						
Success criteria	Perception of own success measured against success criteria (very successful to not successful at all)					
Frequency Row Pct	Most successful	Very successfu l	Neither successful/ unsucces sful (neutral)	Somewhat successful	Not at all successful	Total
Advancement in the hierarchy	1 2.86	12 34.29	13 37.14	6 17.14	3 8.57	35
Respect received due to competency	7 20.00	14 40.00	7 20.00	4 11.43	3 8.57	35
Positive impact of a person's work	17 48.57	13 37.14	3 8.57	2 5.71	0 0.00	35
Work life/ personal life balance	10 27.78	14 38.89	7 19.44	5 13.89	0 0.00	36
IPMS assessment rating	1 2.86	10 28.57	15 42.86	6 17.14	3 8.57	35
Total	36	63	45	23	9	176
Frequency Missing = 4 Fisher's exact probability of (Chi-square statistic having the value of 45.23 under the null hypothesis that frequency patterns for success criteria are similar) < 0.0001***						

In concluding this construct on career success, it can be summarised that the main findings pertain to how the ODL Library middle managers define success and how their own success measures up against their perceptions of how important it is. The findings indicate that respondents in general perceive that they do not measure up to set perceived expectations in all respects. Figure 7 below depicts the measured own experience of success versus the importance of success. Success experience total frequencies for a level 1 and level 2 rating relate to the 'agree' and 'strongly agree' ratings. The own experience of success is rated lower than the perceived importance of the success definitions.

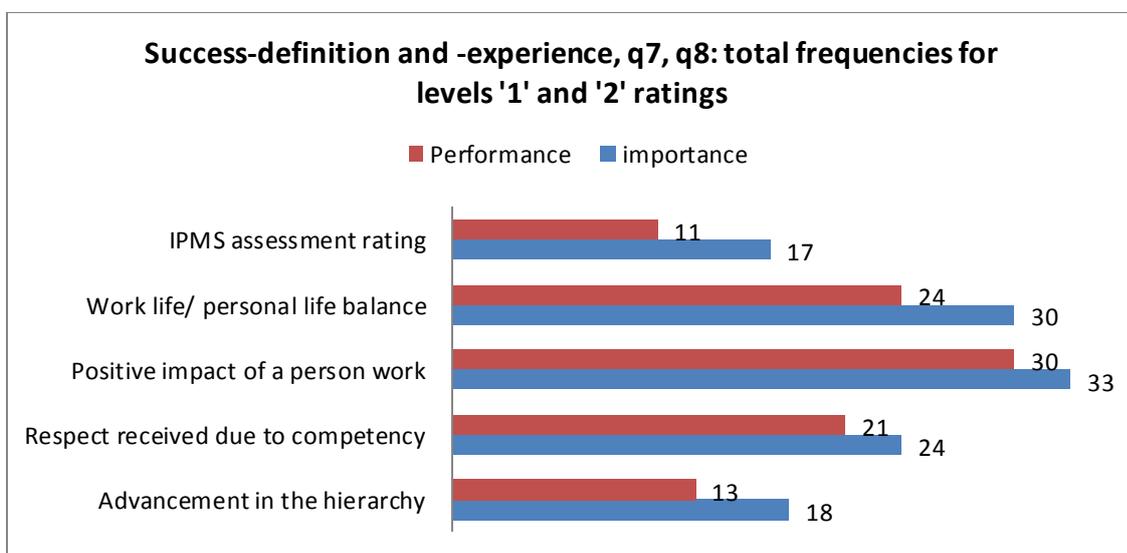


Figure 7: Own success versus importance of success criteria

4.1.5 Concept of development strategies that affect career advancement

The purpose of Questions 9-11 and Question 13 was to investigate development strategies that facilitate success on the employment pathway of ODL Library middle managers. The attitudes of ODL Library middle managers towards the importance of these development strategies, including identified career development strategies, that lead to career success needed to be established.

4.1.5.1 Appointment contributor: Qualifications

Question 9 probed participants to indicate the formal qualifications which they have. Table 15 reports on the qualifications obtained by ODL Library middle managers. This serves as a summary of the qualifications that participating middle managers

possess.

Table 15: Frequency distribution of qualifications

Question 9: Frequency distribution of qualifications			
The total number of qualifications reported add to more than N=36, since respondents chose from more than one qualification category)			
Qualification	Frequency	Percentage	Cumulative Percentage
Library diploma	4	6.56	6.56
Bachelors	9	14.75	21.31
Bachelors LIS	6	9.83	31.15
Formal ODL qualification	0	0.00	31.15
Bachelor's degree and Postgraduate Library diploma	4	6.56	37.73
Management qualification	6	9.84	47.55
Honours LIS	20	32.79	80.34
Masters LIS	4	6.56	86.90
Doctorate LIS	1	1.64	88.54
RPL	1	1.64	90.18
Other	6	9.83	100.00
Total	61	100.00	--

Figure 8 depicts the ODL Library middle managers' qualification profile. It demonstrates the trend of obtaining not only LIS qualifications. This trend of including management qualifications is included under "other".

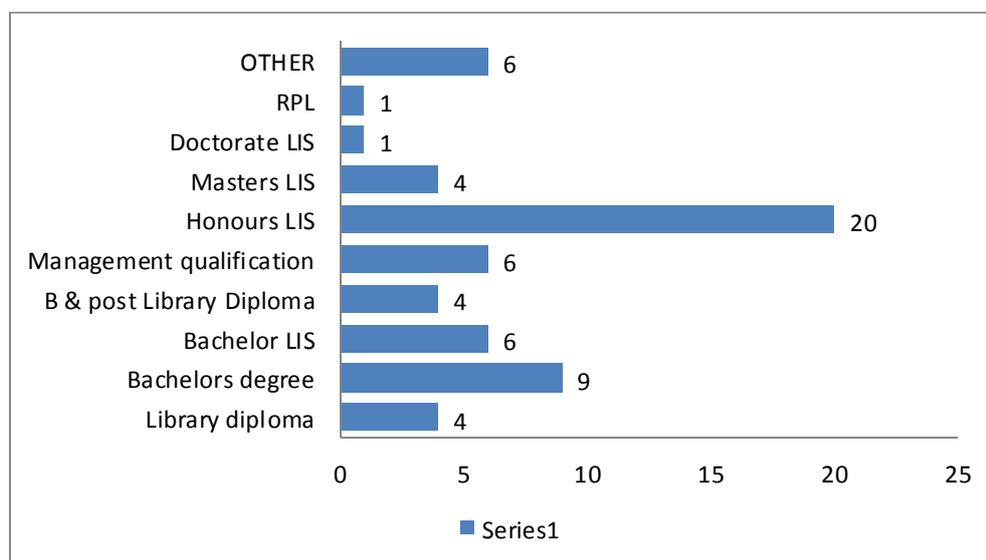


Figure 8: Qualification profile of respondents

4.1.5.2 Appointment contributor: Experience

Question 10 probed participants' perceptions on the importance of six factors relating

to work experience in their environment that facilitated their appointment in their current middle management positions. Table 16 reports on the response patterns for each of these aspects of experience. The last row of Table 16, the row of totals, indicates how respondents perceived their qualifications and experience to be important development strategies for their appointment in their current positions.

Table 16: Appointment contributors: Experience

Question 10: Appointment contributors						
Success criteria/ definitions	perceived success (very successful to not)					
Frequency Row Pct	Critically important	Important	Neutral	Not Important	Irrelevant	Total
Work experience (years)	12 33.33	19 52.78	3 8.33	2 5.56	0 0.00	36
Years ODL Library experience	4 11.11	14 38.89	8 22.22	9 25.00	1 2.78	36
Previous roles performed, diff ODL sections	6 16.67	15 41.67	8 22.22	6 16.67	1 2.78	36
Roles performed in other academic libraries	12 33.33	13 36.11	7 19.44	2 5.56	2 5.56	36
Relevance, work experience to current position	20 57.14	15 42.86	0 0.00	0 0.00	0 0.00	35
Relevance, qualification(s) to current position	17 48.57	15 42.86	2 5.71	1 2.86	0 0.00	35
Total	71	91	28	20	4	214
Frequency Missing = 2 EXCLUDING <i>irrelevant frequencies</i> : Fisher's exact probability of (Chi-square statistic having the value of 47.79 under the null hypothesis that frequency patterns for success criteria are similar) < 0.0001***						

4.1.5.3 Appointment contributor: Development approaches

Question 11 probed participants to indicate which development strategies facilitated their appointment. Table 17 reports on the importance perceptions of 13 strategies as development approaches that participating middle managers can/ did pursue to facilitate the appointment in their current positions. Table 17 therefore reports on frequency of use/ preference for these strategies noted by participants.

Table 17: Appointment contributor: Development approaches

Question 11: Development strategies to facilitate appointment as middle manager		
Frequency Row Pct	Frequency	Percentage
1. Move vertically in the hierarchy	20	12.50
2. Attended management short courses	21	13.12
3. Part of library management succession plan	3	1.88

Question 11: Development strategies to facilitate appointment as middle manager		
Frequency Row Pct	Frequency	Percentage
4. Career plan guidance	16	10.00
5. Line manager developed career plan	1	0.63
6. I developed my career plan	29	18.12
7. Career plan developed, manager and myself	2	1.25
8. I tracked progression against career plan	11	6.88
9. My line manager tracked it	0	0.00
10. I performed secondary management role earlier	25	15.63
11. I networked with professional organisations	18	11.25
12. I had a mentor earlier	7	4.37
13. I encountered obstacles in my progression	7	4.37
Total	160	100.00

4.1.5.4 Development needs of ODL Library middle managers

Question 13 requested participants to rate eight aspects (that relate to development needs to perform the role of middle manager in an ODL Library environment) for their perceived importance when performing in their middle management positions. Table 18 presents the rating frequencies to these factors.

Table 18: Importance perceptions of development strategies that affect performance

Question 13: Importance perceptions of development strategies that affect performance					
Factors Frequency Row Pct	Importance rating scale				
	Critically important	Important	Neutral	Not important	Total
Understand developments in Library service environment	26 72.22	10 27.78	0 0.00	0 0.00	36
Understand: operations of ODL Library services	18 50.00	16 44.44	2 5.56	0 0.00	36
Understand: ODL Library strategic plan	22 61.11	11 30.56	3 8.33	0 0.00	36
Understand: management supervisory/management activities	26 72.22	9 25.00	1 2.78	0 0.00	36
Understand: ODL knowledge management practice	11 31.43	18 51.43	5 14.29	1 2.86	35
Understand: decision-making role in the ODL Library	17 47.22	17 47.22	2 5.56	0 0.00	36
Understand: interpersonal role performance in library	17 47.22	15 41.67	3 8.33	1 2.78	36
Understand: informational role in the ODL Library	13 36.11	20 55.56	3 8.33	0 0.00	36
Total	150	116	19	2	287

Question 13: Importance perceptions of development strategies that affect performance						
Factors		Importance rating scale				
Frequency	Row Pct	Critically important	Important	Neutral	Not important	Total
Frequency Missing = 1						
Excluding <i>not important</i> frequencies: probability of (Chi-square statistic having the value of 26.07 under the null hypothesis that frequency patterns for success criteria are similar) = 0.022 < 0.05*						

A visual summary is provided in Figure 9 to depict critically important contributors that enable ODL Library middle managers to perform the role.

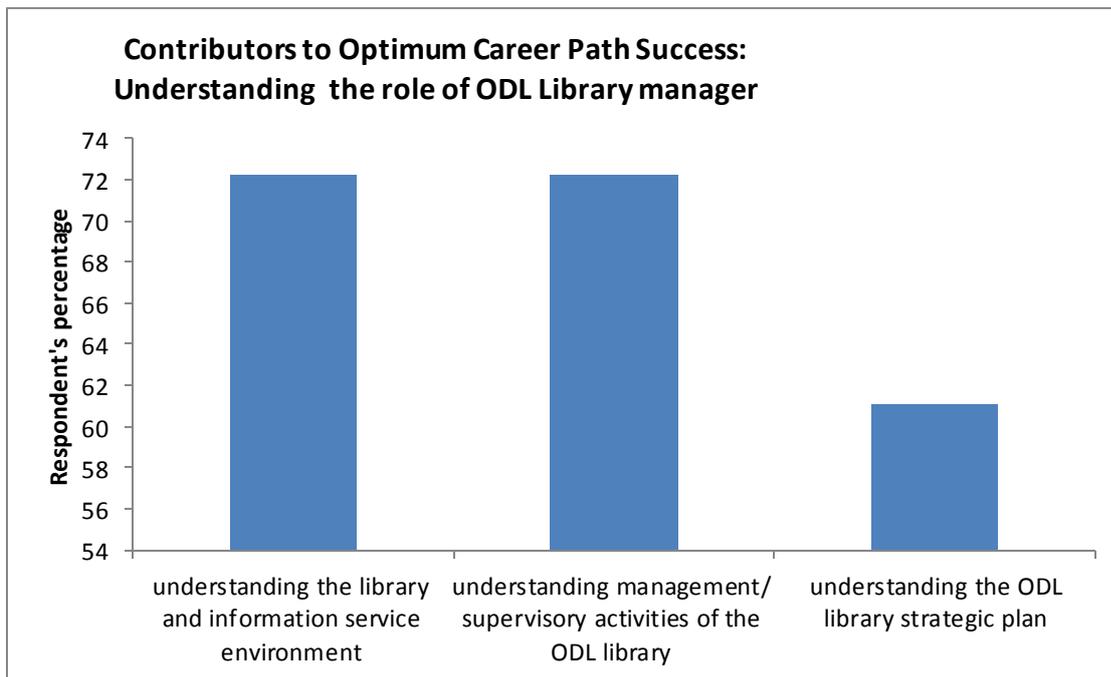


Figure 9: Contributor to optimum career path success: Role of ODL Library middle manager

4.1.5.5 Continued career development strategies

Questions 14 and 15 rated the importance and use of development strategies. Question 14 probed the perceived importance of 20 previously identified development strategies towards continued success/ or career progression, while Question 15 probed perceptions regarding the personal application value of these same development strategies. The frequency response patterns to each of the 20 strategies are reported in Tables 19 and 20.

Table 19: Importance rating of development strategies to career success

Question 14: Importance rating of development strategies to career success of specific participant						
Development strategies	Importance rating scale					
Frequency Row Pct	Critically important	Important	Neutral	Not important	Irrelevant	Total
Formal undergraduate library qualifications	10 30.30	14 42.42	5 15.15	3 9.09	1 3.03	33
Formal postgraduate library qualifications	13 36.11	14 38.89	5 13.89	4 11.11	0 0.00	36
ODL Library experience	8 22.22	21 58.33	6 16.67	1 2.78	0 0.00	36
Professional networking	9 25.71	21 60.00	4 11.43	1 2.86	0 0.00	35
Management training	17 47.22	19 52.78	0 0.00	0 0.00	0 0.00	36
IT skills training	12 33.33	21 58.33	3 8.33	0 0.00	0 0.00	36
ODL networking	4 11.11	26 72.22	4 11.11	2 5.56	0 0.00	36
Training in knowledge management	4 11.43	21 60.00	10 28.57	0 0.00	0 0.00	35
Coaching	6 16.67	25 69.44	5 13.89	0 0.00	0 0.00	36
Being mentored	9 25.00	18 50.00	7 19.44	2 5.56	0 0.00	36
Serving as mentor	4 11.43	22 62.86	7 20.00	2 5.71	0 0.00	35
Career plan	6 17.65	25 73.53	2 5.88	1 2.94	0 0.00	34
Participation in special projects	9 26.47	23 67.65	1 2.94	1 2.94	0 0.00	34
Action learning	4 11.43	24 68.57	5 14.29	2 5.71	0 0.00	35
Talent management	7 20.00	19 54.29	8 22.86	1 2.86	0 0.00	35
Counseling	3 8.57	18 51.43	10 28.57	3 8.57	1 2.86	35
360 degree assessment	7 21.21	20 60.61	4 12.12	2 6.06	0 0.00	33
Knowledge management training	4 11.11	21 58.33	9 25.00	2 5.56	0 0.00	36
Leadership development	15 41.67	20 55.56	1 2.78	0 0.00	0 0.00	36
Recognition of prior learning (RPL)	6 17.14	14 40.00	10 28.57	5 14.29	0 0.00	35
Total	157	406	106	32	2	703
Frequency Missing = 17						
Excluding <i>irrelevant</i> frequencies: Fisher's exact probability of (Chi-square statistic having the value of 105.14 under the null hypothesis that frequency patterns for success criteria are similar) = 0.0002, < 0.001**						

4.1.5.6 Use of career development strategies

Question 15 probed participants to indicate the extent that they use the selected development strategies successfully. Table 20 illustrates the successful use /frequency perception of use of development strategies.

Table 20: Use of development strategies after the appointment

Question 15: Use of strategies						
Development strategies	Perceptions of success frequency-of-use rating scale					
Frequency Row Pct	Most successful	Very successful	Neither successful/ unsuccess- ful (neutral)	Somewhat successful	Not at all successful	Total
Formal undergraduate library qualifications	7 20.59	12 35.29	9 26.47	5 14.71	1 2.94	34
Formal postgraduate library qualifications	9 26.47	15 44.12	6 17.65	3 8.82	1 2.94	34
ODL Library experience	3 8.33	24 66.67	9 25.00	0 0.00	0 0.00	36
Professional networking	7 19.44	20 55.56	7 19.44	2 5.56	0 0.00	36
Management training	9 25.71	23 65.71	2 5.71	1 2.86	0 0.00	35
IT skills training	7 20.00	22 62.86	4 11.43	2 5.71	0 0.00	35
ODL networking	3 8.82	16 47.06	13 38.24	1 2.94	1 2.94	34
Training in knowledge management	2 5.71	17 48.57	12 34.29	3 8.57	1 2.86	35
Coaching	4 11.76	21 61.76	7 20.59	2 5.88	0 0.00	34
Being mentored	4 11.43	12 34.29	12 34.29	5 14.29	2 5.71	35
Serving as mentor	4 11.43	17 48.57	8 22.86	4 11.43	2 5.71	35
Career plan	2 6.06	19 57.58	9 27.27	3 9.09	0 0.00	33
Participation in special projects	10 27.78	19 52.78	3 8.33	2 5.56	2 5.56	36
Action learning	6 17.14	19 54.29	7 20.00	3 8.57	0 0.00	35
Talent management	2 5.71	18 51.43	11 31.43	2 5.71	2 5.71	35
Counseling	3 8.57	16 45.71	11 31.43	3 8.57	2 5.71	35
360 degree assessment	2 6.06	13 39.39	13 39.39	2 6.06	3 9.09	33
Knowledge management training	2 6.25	14 43.75	10 31.25	3 9.38	3 9.38	32
Leadership development	10 27.78	21 58.33	2 5.56	2 5.56	1 2.78	36
RPL	3 8.82	11 32.35	13 38.24	3 8.82	4 11.76	34
Total	99	349	168	51	25	692
Frequency Missing = 28 Fisher's exact probability of (Chi-square statistic having the value of 110.36 under the null hypothesis that frequency patterns for success criteria are similar) = 0.0066, < 0.01**						

In concluding the investigation of development strategies that facilitate success on the employment pathway of ODL Library middle managers, it can be summarised that the main findings pertain to how the ODL Library middle managers perceive development strategies and how their own performance that leads to success measures up against their perceptions of how important it is. The findings indicate that respondents in general perceive that they do not measure up to set perceived expectations in all respects. This is depicted in Figure 10 which illustrates the point through a visual presentation of the importance and use of development strategies. It depicts the total number of frequencies for Level '1 and Level 2' ratings (agree/strongly agree) with the importance experience and experience of own performance.

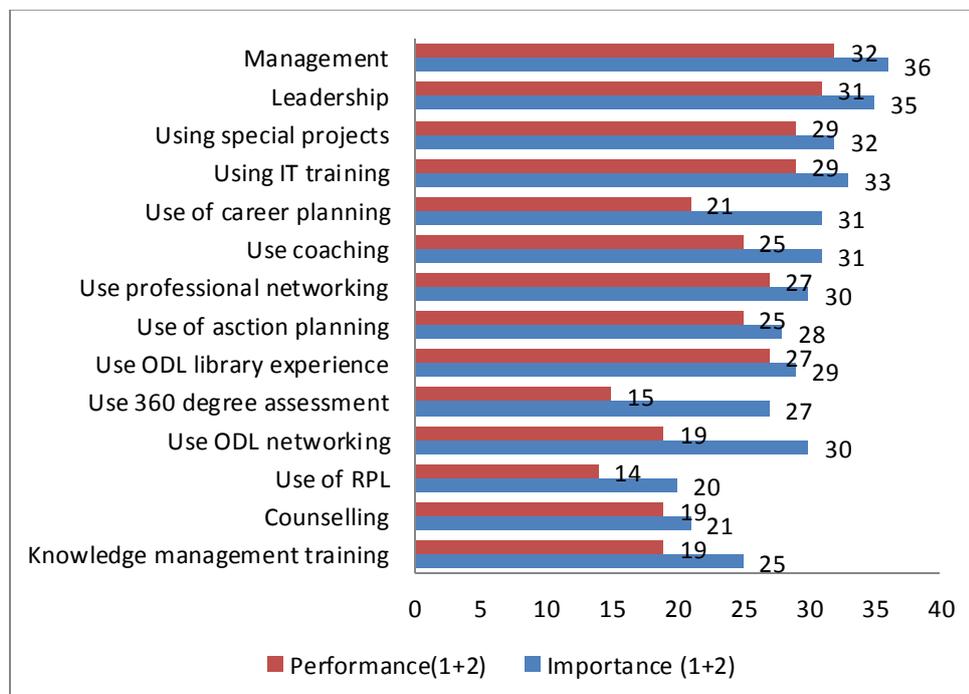


Figure 10: Importance and use of career development strategies

4.1.6 Concept of development factors that facilitate an optimal career path

The purpose of Questions 12 and 16 was to investigate how ODL Library middle managers understand the importance of external factors (over which a person has no or very little control) in facilitating the successful appointment to the post of ODL Library middle manager; and internal factors (innate or developed) that facilitate an optimal career path. The attitudes of ODL Library middle managers towards the

importance of these factors that lead to career success needed to be established. The questions were posed to measure their understanding in terms of selective factors described in the literature.

4.1.6.1 External development factors

The purpose of this part of the study was to investigate how important external factors were in facilitating the successful appointment of ODL Library middle managers. Question 12 probed participants to rate the importance of selective factors that contribute to be appointed to a middle manager position. Table 21 reports on six external factors which were rated by participants on the perceived importance in securing their appointment in their current middle management position. The second entry in each cell reflects the percentage of frequencies for each rating level for a specific factor, for example, 'luck/ serendipity' rates 0%.

Table 21: Perceptions of external factors that promote the middle management appointment

Question 12: Perceptions regarding external factors that promoted appointment in a middle management position						
External factors	Rating scale					
Frequency Row Pct	Critically important	Important	Neutral	Not Important	Irrelevant	Total
Luck/ serendipity	0 0.00	2 6.06	12 36.36	6 18.18	13 39.39	33
Family support	7 20.00	12 34.29	4 11.43	2 5.71	10 28.57	35
Gender	1 3.03	6 18.18	8 24.24	9 27.27	9 27.27	33
Age	1 3.03	2 6.06	10 30.30	10 30.30	10 30.30	33
Geographical mobility	1 3.23	7 22.58	6 19.35	7 22.58	10 32.26	31
Employment Equity policy	3 9.09	10 30.30	9 27.27	4 12.12	7 21.21	33
Total	13	39	49	38	59	198
Frequency Missing = 18 EXCLUDING <i>critically important</i> frequencies: probability of (Chi-square statistic having the value of 26.83 under the null hypothesis that frequency patterns for success criteria are similar) = 0.03 < 0.05*						

4.1.6.2 Internal development factors

The purpose of this part of the study was to investigate what optimised the career path of ODL Library middle managers after the appointment. Question 16 probed

participants' perceptions of the importance of selective internal factors that contributed to the success of participants after the appointment. The perceived importance of six previously identified internal factors in performing in the current middle management positions (thus in enhancing continued career progression) is reported in Table 22. Table 22 reports the response patterns to each of the six factors.

Table 22: Importance perceptions of internal factors to performing in an ODL Library middle management position

Question 16: Importance perceptions of internal factors to performing in middle management position					
Internal factors	Rating scale				
Frequency Row Pct	Critically important	Important	Neutra l	Not Important	Total
Ability	29 80.56	7 19.44	0 0.00	0 0.00	36
Flexibility	18 50.00	18 50.00	0 0.00	0 0.00	36
Communication	27 75.00	9 25.00	0 0.00	0 0.00	36
Determination	26 72.22	10 27.78	0 0.00	0 0.00	36
Hard work	27 75.00	9 25.00	0 0.00	0 0.00	36
Intelligence	15 42.86	20 57.14	0 0.00	0 0.00	35
Enjoyment	18 51.43	14 40.00	2 5.71	1 2.86	35
Total	160	87	2	1	250
Frequency Missing = 2					
Excluding <i>neutral and not important</i> frequencies: Fisher's exact probability of (Chi-square statistic having the value of 19.94 under the null hypothesis that frequency patterns for success criteria are similar) = 0.003**					

In concluding the investigation of factors that facilitate success on the employment pathway of ODL Library middle managers, it can be summarised that the main findings pertain to how the ODL Library middle managers perceive the importance of factors in facilitating an optimal career path. The findings indicate that respondents in general perceive that internal factors impact in particular on their career success. Critically important internal factors as contributors to an optimum career path are depicted in Figure 11.

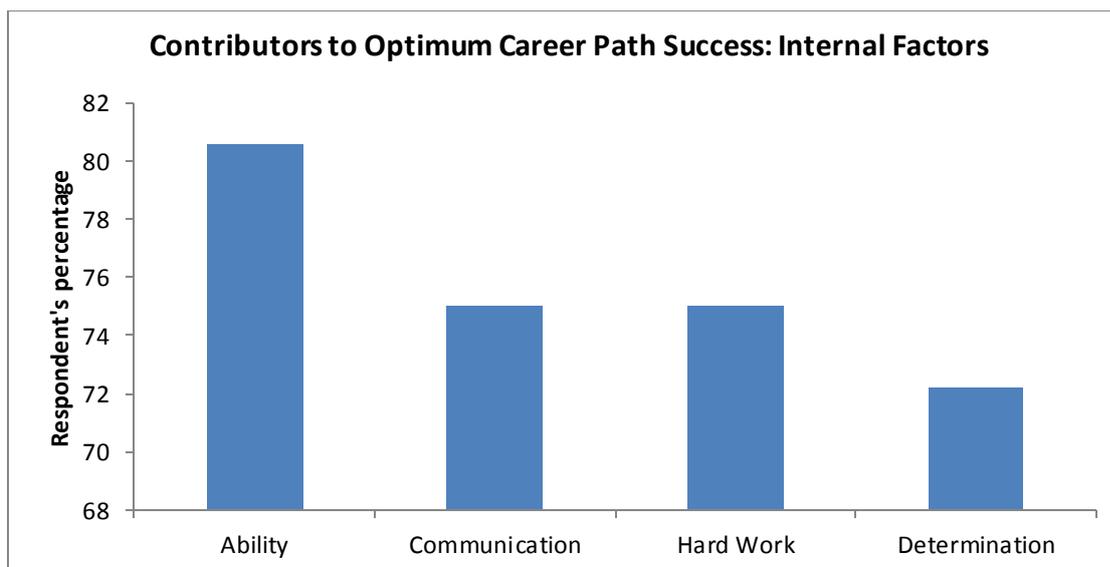


Figure 11: Contributor to optimum career path success: Important internal factors

4.1.7 Concept of managerial competencies that facilitate an optimal career path

The purpose of this part of the study was to investigate the attitudes of ODL Library middle managers towards identified competencies that lead to career success after the appointment. Questions 17-24 probed participants to rate the importance of selective competencies that facilitated success on the employment pathway of ODL Library middle managers.

Tables 23-28, which follow, report the frequency response patterns of participants' perceptions of importance of the elements of the competencies of communication, planning and administration, teamwork, strategic thinking, globalisation and emotional intelligence and self-management towards furthering of career advancement.

4.1.7.1 Communication

In Question 17 participants were requested to rate the communication competency in the successful execution of duties. Table 23 records the importance of the communication competency to ODL Library middle managers.

Table 23: Communication

Question 17: Importance perceptions of communication abilities to managerial success				
Key communication abilities	Importance rating scale			
Frequency Row Pct	Critically important	Important	Neutral	Total
Ability: communicate, flexible way for possible solutions	29 80.56	7 19.44	0 0.00	36
Ability: communicate openly and honestly, feedback, performance	29 80.56	7 19.44	0 0.00	36
Ability: to share knowledge, keeps people up to date	27 75.00	9 25.00	0 0.00	36
Ability: to deliver presentations, higher management meetings	21 58.33	13 36.11	2 5.56	36
Ability: to develop social networks (for example, Web 2)	9 25.00	13 36.11	14 38.89	36
Ability: to develop communities of practice (for example, Facebook or Twitter)	9 25.71	13 37.14	13 37.14	35
Ability: to comfortably exercise managerial power	24 66.67	11 30.56	1 2.78	36
Total	148	73	30	251
Frequency Missing = 1				
Fisher's exact probability of (Chi-square statistic having the value of 82.88 under the null hypothesis that frequency patterns for success criteria are similar) < 0.0001***				

4.1.7.2 Planning and administration

In Question 18 participants were requested to rate the planning and administration competency in the successful execution of duties. Table 24 records the importance of the planning and administration competency to ODL Library middle managers.

Table 24: Planning and administration

Question 18: Importance perceptions of key planning and administration competencies to career success					
Planning and administration competencies	Importance rating scale				
Frequency Row Pct	Critically important	Important	Neutra l	Not Important	Total
Ability: to monitor information, guide future decisions	26 72.22	10 27.78	0 0.00	0 0.00	36
Ability: to use digital software for knowledge repositories	14 38.89	15 41.67	6 16.67	1 2.78	36
Ability: to take calculated risks, with consequences	19 52.78	16 44.44	1 2.78	0 0.00	36
Ability: translate vision/goals to objectives/ actions	27 75.00	9 25.00	0 0.00	0 0.00	36
Ability: to prioritise resource allocation, to projects	28 77.78	8 22.22	0 0.00	0 0.00	36
Ability: to multitask	25 69.44	11 30.56	0 0.00	0 0.00	36
Ability: to use information based financial reports	16 44.44	20 55.56	0 0.00	0 0.00	36

Question 18: Importance perceptions of key planning and administration competencies to career success					
Planning and administration competencies	Importance rating scale				
Frequency Row Pct	Critically important	Important	Neutra l	Not Important	Total
Total	155	89	7	1	252
Excluding <i>neutral and not important</i> frequencies: Fisher's exact probability of (Chi-square statistic having the value of 16.78 under the null hypothesis that frequency patterns for success criteria are similar) = 0.01**					

4.1.7.3 Teamwork

In Question 19 participants were requested to rate the teamwork competency in the successful execution of duties. Table 25 records the importance of the teamwork competency to ODL Library middle managers.

Table 25: Teamwork

Question 19: Importance perceptions of teamwork competencies to career success					
Teamwork competency elements	Importance rating scale				
Frequency Row Pct	Critically important	Important	Neutra l	Not Important	Total
Ability: compile efficient task teams, skills-abilities	21 58.33	15 41.67	0 0.00	0 0.00	36
Ability: compile efficient task teams, perspective-diversity	10 27.78	21 58.33	4 11.11	1 2.78	36
Ability: set development goals, promote ODL librarianship	16 44.44	17 47.22	3 8.33	0 0.00	36
Ability: create quality monitoring systems for team-rewards	21 58.33	14 38.89	1 2.78	0 0.00	36
Ability: support task teams, coach, mentor, quality service delivery	19 52.78	15 41.67	2 5.56	0 0.00	36
Ability: convey ideas understandably to evoke desired actions	20 55.56	16 44.44	0 0.00	0 0.00	36
Ability: apply staff knowledge to ensure goal achievement	21 58.33	15 41.67	0 0.00	0 0.00	36
Ability: implement conflict resolution effectively	27 75.00	9 25.00	0 0.00	0 0.00	36
Total	155	122	10	1	288
Excluding <i>neutral and not important</i> frequencies: Fisher's exact probability of (Chi-square statistic having the value of 16.78 under the null hypothesis that frequency patterns for success criteria are similar) = 0.01**					

4.1.7.4 Strategic action

In Question 20 participants were requested to rate the strategic action competency in the successful execution of duties. Table 26 records the importance of the strategic action competency to ODL Library middle managers.

Table 26: Strategic action

Question 20: Importance perceptions of strategic thinking competencies to career success				
Strategic thinking competencies	Importance rating scale			
Frequency Row Pct	Critically important	Important	Neutral	Total
Ability: exhibit professional ODL leadership based LIS insight	15 41.67	19 52.78	2 5.56	36
Ability: keep abreast initiatives ODL partners/competitors	16 44.44	18 50.00	2 5.56	36
Ability: analyse the implications of current LIS trends	19 52.78	17 47.22	0 0.00	36
Ability: fit into corporate culture of ODL organisation	12 33.33	21 58.33	3 8.33	36
Ability: understand structures of the ODL organisation	15 41.67	20 55.56	1 2.78	36
Ability: understand the competencies of ODL organisation	15 41.67	20 55.56	1 2.78	36
Ability: prioritise operational goals, promote implement strategy	17 47.22	19 52.78	0 0.00	36
Ability: use org knowledge assets, inform critical issues	18 50.00	17 47.22	1 2.78	36
Ability: encourage innovative new ideas	23 63.89	13 36.11	0 0.00	36
Ability: market information products, services of ODL environment	14 38.89	20 55.56	2 5.56	36
Total	164	184	12	360
Fisher's exact probability of (Chi-square statistic having the value of 15.78 under the null hypothesis that frequency patterns for success criteria are similar) = 0.62				

4.1.7.5 Globalisation

In Question 21 participants were requested to rate the globalisation competency in the successful execution of duties. Table 27 records the importance of the globalisation competency to ODL Library middle managers.

Table 27: Globalisation

Question 21: Importance perception of globalisation competencies				
Aspects of globalisation	Rating scale			
Frequency Row Pct	Critically important	Important	Neutra l	Total
Ability: recognise impact, global events on the ODL org	15 41.67	19 52.78	2 5.56	36
Ability: travel to countries, ODL Library interests	16 44.44	18 50.00	2 5.56	36
Ability: obtain basic business vocabulary, interests outside SA	19 52.78	17 47.22	0 0.00	36
Ability: be sensitive to cultural cues, adapt in novel situations	12 33.33	21 58.33	3 8.33	36
Ability: avoid stereotyping, recognise culture-variation	15 41.67	20 55.56	1 2.78	36
Ability: insight, cultural background affects, attitudes	15 41.67	20 55.56	1 2.78	36

Question 21: Importance perception of globalisation competencies				
Aspects of globalisation	Rating scale			
Frequency Row Pct	Critically important	Important	Neutra l	Total
Total	92	115	9	216
Fisher's exact probability of (Chi-square statistic having the value of 5.88 under the null hypothesis that frequency patterns for success criteria are similar) = 0.82				

4.1.7.6 Emotional intelligence and self-management

In Question 22 participants were requested to rate the emotional intelligence and self-management competency in the successful execution of duties. Table 28 records the importance of the emotional Intelligence and self-management competency to ODL Library middle managers.

Table 28: Emotional intelligence and self-management

Question 22: Importance perceptions of EI competencies to career success						
EI Competencies	Importance rating scale					
Frequency Row Pct	Critically important	Important	Neutral	Not Important	Irrelevant	Total
Ability: foster sense of self-worth and capabilities	21 58.33	12 33.33	2 5.56	1 2.78	0 0.00	36
Ability: see opportunities, own growth towards personal goals	18 50.00	16 44.44	1 2.78	1 2.78	0 0.00	36
Ability: good personal standards, for integrity and ethical conduct	26 72.22	10 27.78	0 0.00	0 0.00	0 0.00	36
Ability: set standards of honesty	29 80.56	7 19.44	0 0.00	0 0.00	0 0.00	36
Ability: meet personal objectives re personal growth	18 50.00	16 44.44	2 5.56	0 0.00	0 0.00	36
Ability: obtain balance, work/ private life	23 63.89	13 36.11	0 0.00	0 0.00	0 0.00	36
Ability: persevere even when obstacles are present	24 66.67	12 33.33	0 0.00	0 0.00	0 0.00	36
Ability: take a personal interest in concerns, others	15 41.67	14 38.89	4 11.11	2 5.56	1 2.78	36
Ability: remain confident when resolving disagreement	23 63.89	13 36.11	0 0.00	0 0.00	0 0.00	36
Ability: apply different leader-styles, situation-dependent	22 61.11	13 36.11	0 0.00	1 2.78	0 0.00	36
Ability: establish, learning environment via knowledge sharing	20 55.56	16 44.44	0 0.00	0 0.00	0 0.00	36
Total	239	142	9	5	1	396
EXCLUDING <i>irrelevant</i> frequencies: Fisher's exact probability of (Chi-square statistic having the value of 35.18 under the null hypothesis that frequency patterns for success criteria are similar) = 0.016, < 0.05*						

In concluding the investigation of the attitudes of ODL Library middle managers towards competencies that facilitate success on the employment pathway, it can be summarised

that that the main findings pertain to how the ODL Library middle managers perceive competencies as facilitators of career success. The total frequencies of critically important ratings for the different competencies in order of importance are: planning and administration (61.51%); emotional intelligence and self-management (60.35%); communication (58.96%); teamwork (53.38%); strategic thinking (45.56%); and globalisation (42.59%). To further inform the importance participants attach to the mentioned six competencies, participants' perceptions of how successfully they implement these competencies in their own middle management positions were also evaluated in six questions (Questions 24 of the questionnaire). This assessment is presented in Table 29.

Figure 12 below depicts the frequencies reported for the level '1' responses of both the perceived importance ('1', or 'very important' rating) of these competencies and participants' perceptions of their own success in applying these competencies in their middle management positions ('1', or 'very successful' rating). Please note that the level '1' frequencies are expressed as relative frequencies to a total of 36 to allow comparison between perceived importance and successful use of competencies.

Table 29: An assessment of perceived personal success on managerial competencies

Question 24: An assessment of personal success/ accomplishment on managerial competencies						
Management competencies	rating scale					
Frequency Row Pct	Most successful	Very Successful	Neutral	Somewhat successful	Not at all success- full	Total
Communication	12 33.33	17 47.22	2 5.56	5 13.89	0 0.00	36
Planning and Administration	14 38.89	18 50.00	1 2.78	3 8.33	0 0.00	36
Teamwork	17 47.22	15 41.67	1 2.78	2 5.56	1 2.78	36
Strategic action	11 30.56	20 55.56	1 2.78	3 8.33	1 2.78	36
Globalisation	3 8.33	17 47.22	12 33.33	3 8.33	1 2.78	36
Emotional intelligence and self-management	13 36.11	18 50.00	1 2.78	4 11.11	0 0.00	36
Total	70	105	18	20	3	216

EXCLUDING irrelevant frequencies: Fisher's exact probability of (Chi-square statistic having the value of 45.04 under the null hypothesis that frequency patterns for success criteria are similar) = 0.002 **

Figure 12 below depicts the relative importance frequencies of competencies versus the frequencies of perceived performance of these competencies in optimising the ODL Library middle management career path.

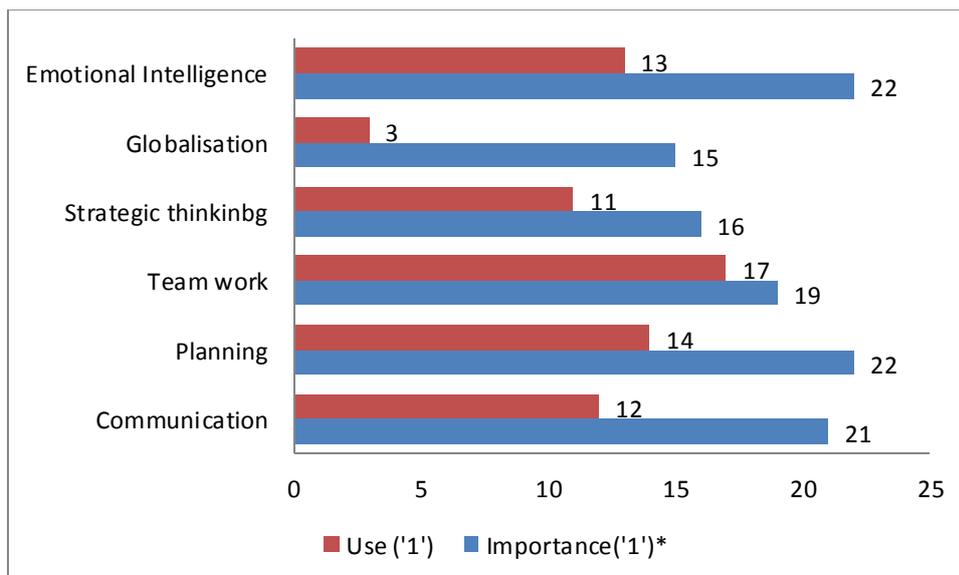


Figure 12: Importance and use of managerial competencies

4.2 QUALITATIVE DATA: INTERVIEWS

Qualitative data was collected in order to gain an in-depth understanding of the context of middle management development in an ODL Library. Face-to-face interviews were conducted with key individuals and institutional documents were examined. The presentation that follows provides details on the response rate and the presentation of qualitative results.

Table 30 provides a summary of the interviewees' characteristics. Interviewees indicated where the interviews should be held, namely the researcher's office. All interviewees provided consent to participate in the interviews and granted permission for the interviews to be recorded. None of the interviewees withdrew at any stage from the interviews.

Table 30: Interview respondents of the ODL Library

Years of service	Managerial role	Language group	Percentage
5years+	Supervisor	Afrikaans/English	25%
5years+	Manager	African	25%
5years+	Deputy Director	African	25%
5years+	Director	African	25%
Total	4	4	100%

4.2.1 Presentation of qualitative data: Interviews

A semi-structured interview protocol (Appendix 11) with open-ended questions was used in this study, based on the research questions. Interview findings on the respective themes relating to the research questions are given in the section below.

4.2.1.1 Sequence of presentation of qualitative findings

The sequence of the presentation of qualitative data collected during interviews is recorded in the same sequence followed for the presentation of the quantitative data as the analysis strategy for quantitative data detailed in Chapter Three relates to the research questions. Qualitative data includes both the responses to the 'how' and 'why' questions in the interview protocol and information gathered through open-ended questions in the questionnaire (questions 7, 8, 9, 11, 12, 14, 16).

4.2.2 ODL Library middle management explanation of success

Respondents representing the respective managerial levels of supervisor, manager, deputy director and director expressed their views on the perceived importance of success criterion three in the questionnaire, namely that success relates to the positive impact of a person's work on the institution. The responses of both the supervisor and deputy director (50% of the respondents) explained respectively that a person's contribution relates to the impact on students:

'In the end we all rendering a service to the client and client satisfaction has got an impact on the institution.'

'If I do something and then I achieve it and then it has an impact on the university, especially on the student part, then I will say that is success.'

'I think because of our ultimate product is the success of the institution-the throughput of the students and our input to the ODL institution.'

All interviewees (100%) explained in turn how success can be realised, namely through 'adequate support for me to deliver on the responsibility', to 'gain knowledge' of what is expected and 'teamwork':

'It's all about the knowledge in the end. If you know the impact of what you do has on a client it's about the knowledge and how things link to each other. That will create the success.'

'Maybe we need to do some workshop on the 'impact of managers work on the institution' for people to know why are you a manager and then what is your role and what is your responsibility as a manager.'

'We should all try and define our purpose according to the end product that we are going to produce and work together.'

There were two open-ended questions pertaining to the success concept in the questionnaire to which the participants could respond, namely Questions 7 and 8. Respondents were asked to indicate other success definitions; and their reasons for success based on other factors. Two persons of the 36 participants (5.55%) responded to these questions. No additional success definition or other reasons for their perception of own success was suggested. It was, however, accentuated in these responses that the score received during performance assessment should not be viewed as a true reflection of a person's achievement.

4.2.3 Development strategies that affect career advancement

Strategies in support of development were discussed to establish why qualifications and experience are important and how development can be improved.

4.2.3.1 Qualifications

The perceived importance of qualifications as a contributor to the appointment to a middle manager position was expressed by 75% of the respondents representing the respective managerial levels. The manager, in particular, had strong views on why qualifications are important and how the qualifications of ODL Library middle managers can be improved as a qualification helped to 'translate theory that was shared in class into practice'. It was further explained that:

'When developing prospective librarians to become managers, the context in which a person manages is not considered. In this regard a shortcoming in the LIS curriculum may need to be considered. There should actually be an ODL course embedded in librarianship because now we are addressing the fact that the paradigm of the profession is actually shifting and not by a small percentage, by a very huge percentage, and I think the move is very fast. So I think we need to be conversant with the fact that the profession itself is changing. Therefore the curriculum should be reviewedbut as the library we can work very well to say this is what we would like to see as the final products from librarianship because in our time was not actually looking at the ODL but now this is the need in the communities'.

The perceived importance of qualifications after the appointment as a contributor to a successful career path was further expressed by 100% of the respondents representing the respective managerial levels. It was explained why it was needed and how they could equip themselves to enhance performance.

The supervisor accentuated the importance of opportunities through formal studies and explained that:

'The biggest one obviously was my (LIS) degree in library science that I did through the ODL institution but also I think the one thing that for me sort of focused the attention more was the one year course we did on first-line managers through Business Management Studies. It was a supervisory course'.

Also the manager pointed out that the importance of a LIS qualification and added two more qualifications of importance to ODL Library middle managers:

'Library and Information Science (LIS) 'qualifications are very important'.

'I think the understanding of the three (LIS/ODL/Management) can actually go together but I think a bit of an emphasis on the fact that in the library we do need a library qualification, that's a standalone, if we want to be respected and if we want to keep up the image of librarianship'.

The deputy director explained the value of a course on ODL:

The university's new courses on open distance learning are very good. Because if you do...for example, I did my master, I was not exposed to this open distance learning. So since I'm working in ODL I need to read more; and a course would benefit me a lot'.

The manager and senior middle managers on the post level of deputy director and director (75%) explained why ODL Library middle managers need to equip themselves to perform the middle management role better:

'It is very important that middle managers in the management hierarchy have different levels of education'.

And:

'Master's level-that's where you do more management training or management courses in full. On my level it's really important.

And:

...'ODL middle managers in senior positions should have higher qualifications that will make them to be competitive, to be able to have a conversation with their peers in the academic institutions. If you don't have that people do not take you seriously, especially in an academic institution'.

There was one open-ended question pertaining to qualifications in the questionnaire to which the participants could respond, namely in Question 9. They were asked to indicate other qualifications obtained. Six participants (16.66%) added additional qualifications to the list provided. Of these participants indicated that they have advanced qualifications in management, namely a Master's degree in Business administration and a Master's degree in Management and Public Development Management.

4.2.3.2 Experience

The perceived importance of experience as a contributor to the appointment to a middle manager position was expressed by 75% of respondents, including a supervisor, manager and deputy director representing the respective managerial levels. It was explained why experience benefits management and how it can be gained:

'I don't think I would have made it if I had gone into management immediately without having some experience of how things work on floor level- experience of how other managers manage/treat staff.'

And:

Some of the things that we are taught in class are actually not the practice. People who have been in the system for a long time, they would actually help you to harness or to move forward with your qualification.

And:

'appointment was facilitated by experience that I have...'

4.2.3.3 Career development needs and strategies

It was explained during interviews that development strategies influence the successful career path both before and after the appointment.

Four career development strategies which facilitated an ODL Library management role were accentuated and explained by the supervisor, manager and deputy director. They comprise 75% of the respondents representing the respective managerial levels:

- Secondary leadership roles

The supervisor explained why secondary leadership roles facilitate a successful career path:

'Secondary leadership roles that we have in the library actually do have an influence. It's an area where you get another kind of experience than just managing the people. It's also an area where you can network with fellow staff members in a different level on different things and I think the more these kinds

of things you attend, the better you get to know the institution in the end and you get to know the people around you. You know who the 'who-to-go-to' guy is and that becomes a very important part of managing people and reaching your goals'.

- Mentorship

The deputy director and the supervisor respectively expressed their views on mentorship as a facilitator of a successful career path.

'I had a good manager because that's where I developed my skills. It was through mentorship'.

And:

'..... having worked under a manager or a supervisor really before, impacts a lot on your views of what can be done, what cannot be done, and I was lucky I had very good managers throughout my career'.

- Professional networking

The manager expressed a view on how professional networking could facilitate a successful ODL Library career path.

'ODL networking is more about...how it is done in other libraries and how can we again share or learn from each other? What makes, let's argue, the University of Canada to excel in their ODL? What is it that they're doing different from South Africa and what kind of expertise do we need to be a well-vested ODL institution?'

..and if we're looking at training, how ODL librarians/managers should be trained'.

- Secondment

The manager explained why secondment contributes to a successful career path and how it could contribute to development in order to ensure a successful career path:

'I realised that it's like I've reached my dead end and it's quite frustrating if one would think about you have a lot to offer. You have a lot of ideas and you feel

you can grow if perhaps you can work closely with people that are in the strategy, not because you want to take over the strategy but there's so much that you can share'.

'If my director is not there and I have a role to play for six months, there will be a way of reporting on what has been achieved.....Secondment can help me and expose me into the best way of being a leader in the ODL Library'.

'Some managers especially if they are in a senior position they are scared to be outshined by the younger ones but they don't understand that if you open doors and allow people to lead as you lead it's an indication that you are leaving a legacy as you go out or you'll retire for argument sake. By the fact that you have allowed Nomsa (fictitious name) to be part of what you were doing and you kept track of how she develops then you have left a legacy. I suppose Nomsa will keep mentioning that during the senior manager's time this is what I was exposed to and she/he supported me and all that. In her life Nomsa will always mention the senior manager'.

Career development strategies which facilitated an optimal ODL Library middle manager career path after the appointment relate to the need to understand the environment; and for continued career development. The following views were expressed by all respondents (100%) representing the respective managerial levels on 'why' there is need for development in terms of understanding the environment or 'how' it could be internalised:

- ODL environment

The manager explained why ODL institutions are important and the subsequent need for ODL networking and how ODL Library middle managers can align academic librarianship with ODL librarianship:

'...in our case the profession is librarianship. What's happening outside in other ODL libraries for that matter, trends in library, changes, anything like that that's very specific of what we do for the institution; but there's also the wider institutional aims and goals that you need to keep track of. Everything needs to be aligned in the end to reach that same goal'.

'We want to spread our wings as librarians or as the institution, being ODL, to say whoever would like to study should be able to study and I think we're also looking at the fact that people that would like to study at a certain age should not see their age as a barrier, should also not see their physical placement as a barrier. They should be able to know that they can be serviced by the library and by the institution wherever they are and again we need to look at the fact that the matters of knowledge economy are actually not asking us, they ask...they forcing us to make sure that we do actually embrace the ODL institutions'.

- Understanding the LIS profession

The supervisor explained why an understanding of the LIS profession is important:

'Because of the profession we are in as a manager you need to be able to keep up-to-date with what's happening. You cannot just focus on managing the people. You need to know the profession in which you are managing your people. So an understanding of both LIS and management are very much hand-in-hand.'

- Understanding of the ODL Library strategic plan

All middle managers explained why an understanding of the ODL Library strategic plan is important. The supervisor pointed out a gap in the development of ODL Library middle managers as follows:

'...on the level where we are working we are dealing with huge teams and we are more focusing on the managerial side and getting the job done than a strategic viewpoint but I think it's probably a gap. The two should actually be talking to each other. I think we sometimes get so bogged down in the day-to-day running of a team and the things that need to be done that strategy is placed in the backburner and it's something maybe that should receive attention, that can be addressed more often to say align the two'.

The manager placed a high premium on understanding the ODL Library strategic plan:

'For me there is no development without involvement on the strategic level. There is less development with imposing. The most important thing that I think we miss in the library is to include people'.

Senior managers supported the views of first-line managers as to why participation in strategic planning is important and how it can be internalised:

'Deputy directors focus too much on operations and too little on strategic planning, so 'how do you develop?' 'We need communication since I need to engage with people. You need to share. People need to feel part of this from the beginning'.

The director also accentuated how middle managers can be developed through participation in the strategic plan:

'It's very useful also if you want to progress into senior positions to be sharing the same vision with the organisation and with your senior person. Be supportive of that person's role because then you will be seen in the positive light. It will enhance your progression'.

Continued career development strategies which facilitated an optimal career path for ODL Library management were accentuated and explained by 100% of the respondents representing the respective managerial levels:

- Leadership development

The manager explained how leadership development was made possible through a leadership programme and why it is recommended:

Building Tomorrow's Leaders programme: 'It'(taught me) different ways of doing things, how you can win people, how you can include people, what is expected from a leader and from a leader and a manager'.

- Secondment

The two first-line managers confirmed the importance of secondment as a career development strategy after the appointment. The supervisor explained why secondment is important and the manager confirmed its importance respectively:

'Secondment can help me and expose me into the best way of being a leader in the ODL Library'.

And:

'Secondment can help me'.

- Networking

Networking as a development strategy is considered important after the appointment by the supervisor and the manager who explained how networking contributes to a successful career path:

'I do belong to LIASA so you do meet some people in the LIASA conferences and things that I've attended. The biggest networking has actually been internally in the...with colleagues and in our management teams.'

The perceived idea of what it means to be developed as a manager in the current position was expressed by the supervisor, manager and deputy director (75%) respectively. The supervisor explained that:

'in any job, and it will also apply to middle management, the focus is on career development'. 'ODL courses from a service point of view would benefit supervisors since service delivery is mostly done in an environment where the client is represented by a piece of paper.'

The manager placed the focus of development on ODL and explained why:

'When you say you are ODL it means you are conversant of the fact that service has to be rendered in different packages and for different people in their geographically disbursed environments.'

The deputy director explained how development benefits middle managers:

'Development from a personal point of view is that it is to develop skills.'

There was one open-ended question in the questionnaire which pertained to other strategies that affected the present position, namely Question 14. Four persons (11% of the participants) responded to the question. Development strategies mentioned pertained to the importance of a mentor, using opportunities, succession planning and career planning.

In response to an open-ended question, Question 11, in the survey questionnaire as to what obstacles ODL Library middle managers experience in being appointed as middle manager, it was explained that the lack of vacancies on the managerial level is an obstacle to the appointment to the position of middle manager. During interviews, the director explained why middle managers are sometimes reluctant to

apply for senior managerial positions:

We might as the executive be considering developing staff and taking them to a higher level. Staff may want to be developed but they want to maintain the status quo. Staff only sees the challenges that we (as senior management) face and that they think that 'I couldn't have handled that'. They see the downside. I think we need to highlight...bring up the positive things much more often and celebrate them more but not show the difficult things most of the time and focus on the negative things'.

4.2.3.4 Successful use of career development strategies

A total of 75% of the respondents representing the respective managerial levels explained why the use of career development strategies is lower than the importance thereof. The supervisor explained:

'A lot of people sometimes have problems bringing theory and practice together... find a way to interpret what you've learnt and to apply it in such a way that it works in your institution'.

The manager provided a reason:

'I think it's an opportunity to practice and also one needs the necessary or the adequate support'. 'If I can be open and honest, when you are in a leadership development drive you need to be able to go...would say you have a workshop or a course. After you've been taught something in class you want to come and practice it. The environment at the ODL Library does not allow that and then you tend to ask yourself is there a need or is there a need for you to silently do it on your own, find spaces that are going to absorb you to be able to exercise your leadership role and your skills.

The deputy director's explanation as to why the use is rated lower than the importance supports the view of the manager:

'So for me it's like attending...you attend, yes, you learn on that particular time and then from there you come out thinking that this is good thing and then I'm going to apply it. There's no time here to apply that'.

'The use of strategies is perceived lower by middle managers than its importance since 'there's no platform to actually enforce it? If it is not practiced, training is 'just a waste of money...resources'.

4.2.4 Development factors

In accordance with the interview protocol, the focus was on 'why' the respective factors were considered to be important.

4.2.4.1 External development factors

The focus during the interviews was on why 'family support' was rated as a valuable contributor to career success while 'employment equity' was rated as unimportant. The importance of the external factor 'family support' was explained by three (75%) of the middle managers on different levels in the management hierarchy.

The supervisor explained why 'family support' is highly rated, namely

'it relates to family support in the form of moral support'

The deputy director explained that

'family is important more in terms of the workload that they take away from one'.

The director explained why this factor is considered important:

'If you get into a management position you have to make sure that you are able to work in the evenings and hold meetings, travel a lot. You must be willing to work on Saturdays. You must be able to work in the evenings at work. That impacts on family life. If the family is not with you when you apply for those jobs (and if they do not) understand your role and your aspirations and...it will affect the relationship. And if you don't have a strong family background or support then things are probably going to fall apart. Also, if you are studying it means that in the evenings at night you'll have to wake up and do this'.

Responses on the external factor 'employment equity' were received from all the respondents representing the respective managerial levels (100%), namely the supervisor, manager, deputy director and director respectively. Benefits as well as some problems associated with employment equity were mentioned:

'Equity as such is not for me a problem as long as we do not sacrifice our knowledge and expertise and in this regard there are enough people'. There is diversity in many areas- this benefits the ODL Library as each other's weaknesses are supported as you can rely on each other's strengths'

And:

'The value to me- that has been more important- though I would say it should not

be overstated at the expense of what the real output should be, has been the fact that through employment equity the playing fields have been leveled...'

'you also need to make sure that whoever is appointed under the umbrella of EE is knowledgeable, understands the processes.

'Being an EE appointed person with a qualification, are there any gaps that this person has? What do we do to close the gaps? What kind of exposures we can put in place? And mostly support'

And:

'Employment equity and Talent management at the ODL institution need careful planning. It needs to be considered in terms of succession planning and a thought through policy that directs all appointments'

And:

'Employment equity, its original intention, was to redress the inequality of the job distribution in the past. Unfortunately the application and the way it was received by the people were not perceived as such and a lot of resentment came with the policy itself. Some people got the concept that it's an entitlement even if they do not qualify. Some people felt that I've been doing this job and gradually progressing and hoping that I will get this. So there's that bitterness between the people that are supposed to be applying and/or receiving from the employment equity. Even people that are employed that qualify, sometimes you get challenged by the people that you work with because they are not too sure, until you prove yourself that you are actually a good candidate and you know what you are doing then they will accept you but you just cannot assume that the employment equity itself as a policy or as an act would be...is well received by the South African community unfortunately'

In response to open-ended question 12, two of the 36 participants (5.55%) added development factors to be considered as 'professional involvement, experience and knowledge and understanding of librarianship'.

4.2.4.2 Internal development factors

Views were expressed by all participants on the different management levels on some of the six previously identified internal factors that facilitate career success. The supervisor explained how ability benefits middle managers, namely

'ability (must be linked to) willingness'.

The manager explained why hard work was important:

'I think hard work has been to me key, that there is no replacement for hard work'.

The deputy director explained why determination was a facilitator of success on the career path:

'Determination helped because for me I'm a goal getter' and prefer hard work. This was noted by the supervisor and my mentor'.

The director explained how a middle manager can benefit from hard work:

'You can work hard but if you've got a bad attitude it kills everything. I have picked up that you need to make sure that your attitude and your heart is in the right place in the work environment. You need to be able to respect the organisational structure, the seniority of positions, and be able to take responsibility for things that you do. If you do not actually make sure that you contribute positively...and you must always be willing to walk the extra mile. You must be seen to be a positive contributor to the goals of the organisation. But if every time you are willing to work hard but you've been complaining the whole time it kills the whole thing. Then people don't even want to ask you to do certain things and people don't even pick up the good things that, yes, that person will do (a) the good job but then they don't want to ask you. I have learnt early in life that my attitude will either make me or break me.'

There was one open-ended question in the questionnaire which pertained to other important factors after being appointed in the present position, namely Question 16. Four persons (11% of the participants) responded to this question. Of these, two persons accentuated the importance of 'hard work'.

4.2.5 Managerial competencies

The supervisor, manager and director representing the respective managerial levels expressed the value of the six managerial competencies that lead to managerial success by explaining how they benefit from the competencies:

Supervisor:

'I think they are all important. I think all of them have a very huge role to play. For managing, definitely, all of them'.

Manager:

'Strategic action/ communication and communication and emotional intelligence and self-management as key' (competencies).

Director:

'You can't pick up one (competency) over the other'....very important competencies are planning, emotional intelligence and self-management, communication'.

4.2.5.1 Successful use of key managerial competencies

The use of the respective competencies was explained by all the respondents representing the respective managerial levels as follows.

- **Communication**

The supervisor explained why communication is used:

'Communication is extremely important and I think especially because we are such a large institution ...just in our directorate we are ten or twelve middle managers and we link...our services link. It's important for the team as well to know where we are going.

Negotiations are mostly when it comes to IPMS ratings'.

The manager explained the consequence of poor communication and its use:

'I think what kills individuals in any profession is where there is no...one, no communication strategy or, secondly, no room to improve on that communication strategy. One of the key competencies is communication'.

The deputy director and director explained why communication is important and how it can be applied:

'This is the most important competency. 'If you don't communicate, nobody will listen to you'. 'In addition to formal one-on-one meetings on a monthly basis, I have a formal monthly meeting with all staff in branch libraries by means of telephone or video conferences. In between I use email'.

And:

'Communication is primary for us because the only way that we can actually take our message out there and communicate with our staff is through verbal and written communication. So communication forms part of the primary things that I

think are very important in an ODL Library’.

- **Planning and Administration**

Explanations on the use of Planning and Administration were provided by the supervisor and director respectively:

‘There’s a lot of day-to-day planning’, also monthly and annual planning’.

‘.....for the ODL environment in which we work planning is very important, because our clients are not in the immediate environment, therefore you need to plan ahead’.

- **Teamwork**

ODL Library middle managers representing the respective managerial levels expressed the value of teamwork.

Supervisor:

‘If the team understands the common goal, the strategy behind it, then normally the teamwork goes well’.

Manager:

‘You are in a journey with these people’.

Deputy director:

There’s no way that you can achieve without teamwork. That’s where you share ideas’.

‘Geographic mobility contributed to teamwork as ‘It broadens perspective. You get to know different cultures, different people. And then you learn their culture, you know how to work with different people.’ When a person works with ‘different cultures you change also in your management style, how you treat staff and how you work with them’.

- **Strategic action**

All ODL Library middle managers (100%) representing the respective managerial levels expressed the value of strategic action.

The supervisor explained why it is important and how supervisors contribute in this regard:

Even though we work more on the operational level the strategic movement of the university is very important because operations and strategy, in the long run, must talk to each other. So we are very much involved in giving input to what is needed; it's either participatory or it's running with the project itself, doing the operational planning and meeting the deadlines'.

The manager explained how strategy is implemented and why it is important:

'Strategy is always driven by resources. So each manager that is expected to respond to the strategy should be capacitated to do that, as an individual but also with human resources, and a manager should be able to talk to the strategy by indicating what are the changes in the environment because if there is any change it needs to be managed.... And when you manage a change you need to have a pool of skills for communication, for buying people into your idea, for making people to understand that it's not about you as a manager but it is about you for the people but mostly for the institution because when that is not communicated and people don't get a buy-in long before you notice the service might actually suffer'.

'Role of manager on the strategic level relates to 'are the processes talking to ODL? Do we have adequate expertise to respond to the ODL environment and its needs?' But also my role is to help, educate, share, and bring in other people (team) to understand the strategy itself'.

'When you actually include people (in strategic planning) then you easily get a buy-in because you can actually include people. You start a conversation but because the conversation started with all of us here already we beginning to say I'm entrusted with responsibility and there's ownership that I actually need to account for. I was part of that conversation. I heard everything that was discussed. How do I help my organisation move forward? But you realise that there's a lot of resistanceby default you just have to say if it has gone down I cannot be associated with that, you stand aside, but if we were a collective and we were respected as middle managers you would realise that if something happens everybody wants to identify with executive managers because we are on the same level. We feel that we are entrusted with that responsibility to rather market what is it that we do as leaders of the library? But we're not there. We're

not even fifty-fifty. I'm sure it's twenty-eighty and it bothers me'.

If the gap is smaller it will benefit..... I would understand where top management is coming from. I would feel respected as a colleague and...rather as a manager and a senior colleague because surely if I'm a manager there are people that are reporting to me. So by default I'm senior to those people. Collegiality is very important'.

The deputy director and director support the views of the manager:

'Managers, deputy directors and directors should perform strategic planning together from the first alignment of the ODL Library's plans with those of the ODL institution'.

And:

'...Planning being that whatever we do we need to know now what is going to happen next year because we don't have a way of controlling the situation all the time'.

- **Globalisation**

The supervisor, deputy director and director (75% of the participants) explained globalisation from a geographical location point of view and indicated why globalisation was not rated as very important by ODL Library middle managers.

'So for us the geographical location of a client is not such a big impact in our area -our clients must be the same; it doesn't matter where they are'.

And:

'There is no difference between the ODL Library's branch libraries, whether in South Africa or in another country. Distance does not make a library global. It's the same because we are talking the same language. The language is Library related. People skills are needed. Cultural sensitivity is required because 'for you its normal, that's how I say it, but that person has his/her own interpretation'. The only difference between local and other libraries lies within the approach of people towards service delivery. This can be addressed through a service charter'.

And:

'We have to understand people that are not here and we work with people that are working with clients that are not in front of them. You have to be sensitive

enough and be emotionally intelligent to be able to read a situation and/or a behaviour without actually meeting the person and/or the situation, analyse it from the paper and be able to take an informed decision’.

- **Emotional intelligence and Self- management**

The importance of emotional intelligence and how it can be internalised was explained by the supervisor and director (50% of the participants) respectively:

‘With regard to emotional intelligence, emotionally you’ve got to know yourself and you’ve got to know when it’s aimed at you and when it’s an emotional...it’s very important’.

‘Most of us in our team are conversing with each other in a second or a third language. We’re not talking to each other in home languages so we really need to take that into consideration that the way you say something is not always the way you meant it to come out’ .

And:

‘So emotional intelligence is (an important competency). We have to understand people that are not here and we work with people that are working with clients that are not in front of them. You have to be sensitive enough and be emotionally intelligent to be able to read a situation and/or a behaviour without actually meeting the person and/or the situation, analyse it from the paper and be able to take an informed decision’.

The value of self-management and how it can be practiced was explained by the supervisor, manager and deputy director respectively:

‘Self-development means you’re responsible for your own career in a way’.

‘The one thing that I found very interesting that the university has now started off and which I’ve enrolled in is the talent management programme which actually gives you an opportunity to develop your career and identifies areas in which you can work on. So I’ve started with that now which is quite an interesting experience.’ Blind-spots are identified and...it helps in identifying where I can better aspects of my career that maybe need attention. So that’s quite an interesting project that the university is running and that I’ve enrolled in’

And:

“I think it’s more on looking at what has actually come into the fore from IFLA,

the IFLA trends for our profession, and that when you develop you Develop yourself to be a professional, and when you are a professional librarian, for me, the indication is that you can operate anywhere because we are part of the ODL environment. You're expecting to see people sharing information. You're expecting to use technologies like RFID to enable knowledge management. You're also expecting to see that whoever...people can sit under the tree but they will still be able to qualify for whatever they studying. It is not about you are in South Africa. It's about you are here but you have to talk to the globe, how are you different from other people? If you are a manager at the ODL Library, how are you different from other managers in other academic libraries?

And:

'Self-management contributed to the appointment: 'I'll identify my weak point and then I'll work on that. So when I see a position and apply, I don't apply because this is because of salary or this is because of the position, I look at the requirement and then I look at myself. Do you really qualify for that?

There was one open-ended question in the questionnaire which pertained to other competencies that affected the present position. In this regard, no additional competency was added.

4.3 QUALITATIVE DATA: INSTITUTIONAL DOCUMENTS

To determine the need for a middle management development practice in the ODL Library, it needs to be considered what development support is already provided by the ODL institution and its Library in order to fill the gap between the need for development and the way this is currently addressed. Based on the research questions of this study, the most recent institutional documents were subsequently studied with a view to determine how the efforts of the institution feed into the career advancement plan of staff. It was important to read only current documents which are relevant in order to provide an understanding of the context in which ODL Library middle managers operate and the support for development in terms of their development needs.

Institutional documents could be found once access to the ODL institution's intranet was gained. The intranet is password controlled and accessible to all staff. As a staff

member of the institution it was possible for the researcher of this study to gain access to these documents. Permission for the use thereof for the purpose of this study was gained as part of the ethical clearance for this study.

The institutional documents which were examined included documents that relate to the operational and strategic context in which the ODL Library middle managers operate. The content of institutional documents was analysed in terms of the identified themes of this study in order to gain more information that related to developing ODL Library middle managers. The focus was thus on selected development factors and development strategies previously identified as facilitators of the appointment and optimal career path of ODL Library middle managers. These documents were considered since the institutional identity may influence the Library middle managers' approach to development and how they perceive success in their career. They included the institution's strategic documents and policies pertaining to staff development plans. This provided insight into the development support that ODL Library middle managers receive from the institution so that they can perform their role. Documents which explain the goals that staff should meet and related risks as well as documents which indicate staff development opportunities that ensure that they can perform the role of middle manager as an exceptional manager and an exceptional librarian when operating in the context of an ODL environment were considered important. Since the survey questionnaire revealed answers to questions on 'what' is important, and the one-on-one interviews revealed 'why' the development factors and strategies are important and 'how' they can be implemented, an examination of institutional documents would provide primarily qualitative data on 'who, when and where' questions.

4.3.1 Institutional perception of success

To determine who would make a difference to the institution, it needed to be considered what influences the middle managers' perception of success. Institutional documents pertaining to the institution's vision, mission and goals that relate to institutional success were examined. A recent strategic document on the institution's planning context revealed that the ODL institution responds to changes in the macro-economic level of the external environment to ensure institutional success. It states that its planning is influenced by approved plans of Higher Education, particularly the

planning for distance education in South Africa. It also indicates a strong emphasis on public accountability, which requires compliance and governance requirements in line with the dictates of the King III code and commercial best practices (Institute of directors, 2009). Working towards meeting these goals would contribute to the sustainability of the institution which can be linked to success. The institution's vision refers to excellence that the University continually strives for globally. In its mission statement, it indicates that the University, as a Comprehensive, Open Distance Learning institution, is guided by principles such as innovation and creativity. Staff contributing in this regard would make a difference as the person's work has a positive impact on the institution (University of South Africa 2014b:8-9).

The Unisa 2013-2015 planning document entitled *Towards a high performance university* represents the final phase of the institution's current long-term plan. Key institutional imperatives for this period include, inter alia, 'Service' and 'People'. These imperatives or goals are clearly aligned with the institution's performance objectives and strategic risks. The risk description that pertains to Service goal 1 is:

Loss of reputation as a result of the failure to provide quality service to students and other stakeholders (University of South Africa 2014b:23). This is an indication of whose reputation would be compromised when staff does not perform efficiently and effectively.

In terms of where the institution's Talent Management policy fits into the development of ODL Library middle managers, the policy reveals that the institution's Integrated Performance Management System (IPMS) relates to the development pillar of talent management. Performance management is relevant through its pursuit of performance excellence through continuous learning and critical self-reflection and assessment. Talent management addresses the need for performance excellence that drives innovation, productivity and institutional sustainability through engaged employees. Performance excellence, indicated through the institution's integrated IPMS, can be considered as a success criterion linked to perceived success (University of South Africa. Department of Human Resources 2014c:1).

4.3.2 Development strategies

From readily available institutional documents, the researcher found that staff development and career opportunities form part of the institution's reward strategies. The remuneration of staff must be seen in the context of its reward strategy, which has different dimensions that contribute to the employees' reward package. These are remuneration, employment benefits, performance recognition and development and career opportunities. All these elements within the reward strategy should complement one another if the full potential of the employee in the workplace is to be exploited. The Remuneration policy states that the development of an employee, in line with the relevant career path to perform optimally, is managed within the Workplace Skills plan of the person's immediate environment (University of South Africa 2013:7-8).

The institution's Human Resources (HR) Training policy (University of South Africa. Department of Human Resources 2014a:1) is aimed at aligning and integrating training and development interventions into broader improvement initiatives and its integrated talent management strategy. It ensures a coordinated approach to training and development at the institution. The Training policy is relevant to the development pillar of talent management and relates to growth and development (University of South Africa. Department of Human Resources 2014b:9). The policy states that the institution engages its employees in continual learning and acquisition of competencies in order to achieve its strategic objectives. The training initiatives can be seen as a way that the institution executes its commitment to promoting a culture of learning that encourages lifelong learning in the workplace. The policy is informed by requirements prescribed in legislation and the policy relevant to the development of skills and employment equity (University of South Africa. Department of Human Resources 2014a:1).

The Training policy (University of South Africa. Department of Human Resources 2014a:1) thus responds to the questions 'who' is responsible for the development of staff including middle managers, 'where' must the development take place and 'when'. It indicates 'who' is responsible and 'when' must this responsibility be actioned as it stipulates that directors should ensure that the training responsibility is in the performance agreement of managers and employees reporting to them;

budget for training and development within the provisions of the policy and ensure the development and implementation of directorate training plans. Managers and supervisors are responsible for conducting training needs analysis, ensuring structured training plans for the individual employee and the teams, and it encourages employee involvement in training and development and the monitoring and evaluating of the impact of training. The onus is also on the individual employee to take responsibility and initiative for training and development; develop with their supervisors the Personal Development Plan, identify training and development opportunities, evaluate training and implement the PDP, apply the acquired knowledge and skills learnt during the training and submit a report in this regard.

The institution's Human Resources Development Directorate is responsible for the needs analysis/skills audits; evaluation of training programmes; in-house programmes; facilitation of training by external service providers; assistance to line managers with training plans; managing the training budget; taking responsibility for submissions to workplace skills plan and annual training report to the Education Training Practices of the Skills Education Training Authorities (SETA); and managing the return on investment of training interventions.

A study of the policy relating to 'who' pays for attending training revealed that the ODL institution pays for training workshops and internal in-house courses presented during training workshops from the respective departmental training budget and the institution's skills development fund which is a central fund managed by the HR Development Directorate. A response to the question 'where' the training can be attended is that ODL Library middle managers qualify for attending national conferences and seminars in accordance with their training needs. Each staff member's needs should be planned and budgeted for in the departmental training plan, which is included in the Workplace Skills Plan. Each staff member qualifies to attend training interventions to the budgeted value of 2-3% of the annual salary. ODL Library middle managers qualify for this assistance as they are part of the permanent staff category of the institution (University of South Africa 2010a:1). International training workshops will be paid for from the Departmental budget when ODL Library middle managers qualify for specialised training to benefit the development of the Library. International conferences and seminars may be attended should this be

approved in accordance with the relevant policy of the institution's Professional and Administrative Research Committee (PARC) (University of South Africa 2010a:2).

Institutional documents on how ODL Library middle managers can be developed through career development strategies relate to leader development and leadership development. Leader development strategies implemented by the institution focus on coaching of all staff, PDP's for all staff and 360 degree assessment for managers who operate as directors and executive directors. In an open-ended question in the questionnaire which asked the participants to indicate other important development strategies, the need for leadership development was accentuated.

Relevant institutional documents pertaining to management and leadership development reflect mainly on career development strategies which include formal qualifications, experience and career strategies that influence career success.

- **Professional training: Qualifications**

The institution's guidelines for education, training and development indicate that formal qualifications can be obtained through the University. This includes both formal undergraduate qualifications and formal postgraduate qualifications. Payment for the enrolment will be made by the University from the study assistance budget, which is a central fund managed by the HR Development Directorate. A response to the question, 'who qualifies for this assistance', revealed that ODL Library middle managers qualify as they are part of the permanent staff category of the institution (University of South Africa 2010a:1).

- **Professional training: Experience**

Reading the institution's Policy for Recruitment, selection and appointment of employees brought out the fact that experience can be gained through acting, secondment and transfer (University of South Africa, Department of Human Resources 2013:13-15).

Experience can be gained through secondment for a temporary period, after which employees resume their former duties (University of South Africa 2014c:50). It may also entail participation in special projects - a way to afford staff some development

opportunities, particularly to gain specific ODL Library experience. The secondment is subject to certain criteria which should be met by the majority of ODL Library middle managers in terms of their considerable experience and qualifications. Experience can also be gained when acting on behalf of another person or when an employee is transferred to another position, subject to certain stipulations.

Recognition of prior learning (RPL) within the ODL institution espouses values formulation in the Constitution of the Republic of South Africa and the principles of the South African Quality Authority that there should be no repetition of learning outcomes achieved through formal, non-formal and informal learning (University of South Africa (2013:1). Once assessment of a candidate has been completed and an RPL learner has been declared ready to enter formal training, the institution provides the necessary support to bridge the gap, should there be any (University of South Africa 2013:5).

- **Development strategies**

Training strategies of the ODL Library middle managers align with key institutional imperatives relevant to their management responsibility.

In accordance with the institution's strategy relating to management training, the institution informs, educates and trains staff proactively in the use and adoption of new technologies and relevant communication strategies. It actively promotes the revision, appropriate adoption, utilisation and maintenance of systems, processes and technologies across the institution in pursuit of increased efficiencies and service (University of South Africa 2014b:13).

Regarding generic competencies (general management) and functional competencies (technical competencies), variations of training and development interventions pertain to on-the-job training; off-the-job training; seminars and workshops; conferences; E-learning; and credit-based short courses. Certificate courses (except short courses, conferences and seminars) must have a NQF level attached (University of South Africa 2014a:5-6).

- **Career development strategies**

The PDP also includes plans relating to leadership development. The personal development plan therefore contains not only details on required training to operate within the library service environment, but also the leadership development strategies. As part of key institutional imperative 4 of the ODL institution, which relates to people, the objective is to implement the Talent Management plan to attract new staff and retain existing staff (University of South Africa. Department of Human Resources 2014b:43). The relevant institutional document on Talent Management states that as South Africa's single dedicated ODL institution, the institution requires a competent and motivated workforce to deliver on its extensive educational and social mandate as set out in its strategic plan. The University's unique ODL model requires specialised educational capacity and capabilities. It is therefore a challenge to attract and retain staff with such capabilities.

In terms of 'who' is responsible for this policy implementation, it is stated that the process will be championed by senior management but facilitated by line managers. Employees should receive development opportunities based on merit, potential and performance needs measured against criteria for development and advancement (University of South Africa. Department of Human Resources 2014c:3). It is further stated that line managers are responsible for collaborating with the Department of Human Resources on implementing the integrated talent management strategy in their respective departments (University of South Africa. Department of Human Resources 2014b.5). Employees are responsible for, inter alia, supporting and engaging in performance improvement, having insight into the job profile and level of competencies, taking responsibility for own career growth and engaging the line manager, realising the developmental areas, career aspirations and motivation levels, improving the range of learning opportunities, having clarity about what is required to move from one career stage to the next, competing when career advancement opportunities arise and participating in self-directed career development (University of South Africa. Department of Human Resources 2014c:6).

The talent management process is applicable to all employees who are employed permanently at the institution or on a fixed-term contract of not less than twelve

months. The relevant Talent Management Policy is intended to 'ensure business continuity, the enhancement of the institution's operations through capable employees who remain at the leading edge of their profession, ensure that students and stakeholders benefit from high-quality service rendered by competent professionals, encourage employee engagement and subsequent improvement of morale, and also provide developmental opportunities to all employees. Through a talent management programme the institution can attract, develop and retain employees with the appropriate knowledge, skills and mind-set to contribute to the institution's success and sustainability. As part of the institution's definition of talent management, it is accentuated that employees must be able to achieve the institution's strategic objectives and to create a high-performing, vibrant and sustainable organisation' (University of South Africa. Department of Human Resources 2014b:7). It is stated that the institution's talent management leans on four pillars - namely talent attraction, talent development, talent deployment and talent retention. Since this study pertains to development, the document was merely examined in this regard. This refers to the development of employees to enhance a sustainable high-performance organisation. Talent management also contributes to the employee's satisfaction and subsequently feeds job retention, which contributes to the organisation's competitive advantage (University of South Africa 2014b:9).

4.3.3 Development factors

Development factors, identified for investigation in this study, were examined in institutional policies and documents. In terms of external factors, the only external factor that was selected to be tested as part of the survey questionnaire and which features in selected institutional documents is employment equity. The ODL institution has an Employment Equity policy which explains the importance of this factor in terms of the benefits thereof for the institution. It explains that employment equity is aligned with the attraction pillar of talent management and it addresses aspects to ensure equity and diversity at the institution, which is intended to promote human excellence, cultural enrichment and social strength. The Employment Equity policy includes strategies and practices with the purpose of advancing a high performance university and addressing transformation imperatives (University of South Africa 2014b:1).

The only internal factor that was selected to be tested as part of the survey questionnaire and which features prominently in institutional documents is 'ability'. The institution's Talent Management policy recognises this factor as an essential quality that capacitates an individual to perform an activity (University of South Africa. Department of Human Resources 2014c:3). This factor may facilitate career advancement. Other factors that can be linked to the institution's approach to ensure success are hard work, enjoyment and flexibility in terms of the high premium placed by the institution on high performance teams (University of South Africa 2014b:1). In the case of the ODL Library staff, service imperatives are linked to timely delivery of requested information.

4.3.4 Competencies

In the institution's Talent Management policy, the importance of competencies is explained in terms of the definition provided, namely that 'competency refers to any characteristic leading to productivity or meeting the requirements of the job, including behavioural and knowledge sets'. Competency development is closely aligned with talent development since the policy explains that talent management refers to the development of employees in order to enhance their competencies towards creating a sustainable high-performing organisation. Furthermore, this process contributes to job satisfaction experienced by staff and thus increases job retention. The monitoring of competencies identified as crucial elements of the framework is done by the relevant Departmental Talent Management and Employment Equity Committee as this committee is responsible for ensuring high-quality processes and appropriate interventions towards maintaining the integrity of the process (University of South Africa. Department of Human Resources 2014c:7).

Competency development cannot be considered separately from the institutional vision and values. The vision is a signifier of the institution's uniqueness. This should be borne in mind in terms of competency development. As part of the ODL institution's vision statement, it is indicated in the institution's strategic document that the University serves 'in the service of humanity'. The vision statement is explained in the preamble to the institution's 2013-2015 plans and, in pointing at this part of the statement, it explains that the institution serves causes which advance society and humanity. It is further stated that 'elaborated from the perspective of an African

university, means that the University is located in the African context, developing its knowledge and skills, attitudes and values necessary for development of the African continent' (University of South Africa. 2014b:9).

Competency development is also guided by the values that animate the University's strategy, guide its efforts and influence its future, namely social justice and fairness. The institution combines excellence and integrity. The value proposition states clearly what value the students of the ODL institution would find if compared with other higher education providers:

"In providing affordable access with success, the institution offers a relevant range of quality programmes from certificate to doctoral levels in a wide range of fields". This relates to its identity as a comprehensive ODL institution. Integral to the programmes of learning is intensive ICT-enhanced learner support which caters for diverse student needs (University of South Africa 2014b:9). The development of ODL Library middle managers should subsequently be considered against this background.

4.4 CHAPTER SUMMARY

This chapter deals with the presentation of data collected from the different categories of ODL Library middle managers at the ODL Library in South Africa. A summary of the major results and findings was organised according to themes raised by the research questions of the empirical research of this study. The quantitative results emanated from responses from the whole ODL Library middle manager team from one country, since the Unisa Library is the only ODL Library in South Africa and all Library middle managers were invited to participate in the survey questionnaire. The results came from responses to the closed-ended questions and open-ended questions in the questionnaire. Findings further emanated from the responses received from ODL Library middle managers who represented the respective middle management categories of the ODL Library. These responses pertained to semi-structured interviews with open-ended questions. Lastly, findings emanated from the review of institutional documents.

The approach followed to collect data from interviews and institutional documents was similar to the approach followed to collect quantitative data, namely to follow the sequence of research questions and data analysis strategy rather than the strict

order in which the responses were given. Actual words of interview participants were used where appropriate to express the specific idea as expressed during the interviews. Institutional documents revealed factual details of the development practice pertaining to ODL Library middle managers.

A summary of the results and findings from the respective sources of evidence is provided in the order of the research questions.

4.4.1 ODL Library middle managers' perception of career success

- From the questionnaire responses, the ODL Library's middle management clearly have different views in terms of what it means to be successful;
- there were also neutral/not important responses that indicate that some participants were not sure about a success definition;
- the most important success criterion perceived by ODL Library middle managers relates to the impact of a person's work on the organisation;
- from the interviews, it was explained why the success criterion relating to impact of a person's work on the organisation is perceived as important: an ODL Library middle manager's contribution is the cause of an effect on the institution's success, which is actually the success of the ODL Library client;
- institutional documents revealed that achieving the institutional goals, compliance with the stipulations in the King III report as contributors to sustaining the institution are considered success factors - institutional success, however, ultimately relates to excellence for students and other stakeholders through ODL services. These cause the institution to be successful without loss of reputation;
- institutional documents also revealed that the ODL institution places a high premium on staff and career development which enables ODL Library middle managers to develop themselves in order to be successful;
- respondents perceive in general that they do not measure up to the set, perceived importance of the success criteria;
- section 4.4.1 summarises the findings of Research question 4.1.

4.4.2 Importance of development factors as facilitators of career success

- With regard to external factors over which individuals have no or very little control (such as luck/serendipity, employment equity policy), it was indicated by survey participants that these are not perceived as significant contributors to career advancement;
- ODL Library middle managers who had more than one to four job changes and those older than 50 felt even more negative about the possibility that external factors contribute to career advancement;
- there were neutral responses that indicated that participants were undecided about the value of external factors;
- family support was identified by more than half of the ODL Library middle managers as the only external factor that could play a role in the ODL Library manager's career advancement;
- the importance of family support was explained during interviews as moral support and support with workload at home and it was pointed out that family support is only possible if the demands of the middle manager's job are understood by family members;
- employment equity was considered of little importance by both the participants in the questionnaire and the interviewees – however, institutional documents revealed that the ODL institution places a high premium on employment equity as an external factor that facilitates career success, since it addresses aspects of equity and diversity which promotes human excellence, cultural enrichment and social strength;
- during interviews it was revealed that employment equity and talent management need careful planning as the gaps employment equity appointees may experience should no longer be ignored. This challenge was also pointed out as a response to other information requested by the researcher in the closed-ended questionnaire;
- with regard to internal factors (intelligence, flexibility, enjoyment, ability, communication, determination and hard work), quantitative results revealed that all the selected factors are important contributors to an optimal career path for the ODL Library middle manager;

- ability, communication, hard work and determination as internal development factors over which a person has some control were identified as the most critically important factors that lead to an optimal career path.
- interviews revealed that ability should be linked to willingness otherwise it has no value;
- institutional documents revealed that in accordance with the institution's Talent Management policy ability is recognised as an essential quality that capacitates an individual to perform an activity; other factors that cause success are hard work, enjoyment and flexibility in terms of the high premium placed by the institution on high performance teams;
- section 4.4.2 summarises the findings of Research question 4.2.

4.4.3 Importance of development strategies as facilitators of career success

- Firstly, questionnaire respondents pointed out the importance of development approaches that contribute mostly to the appointment of ODL Library middle managers as personal career planning, performing secondary management roles, attendance of management short courses, desire for career advancement and networking with professional organisations;
- responses to the questionnaire revealed that important development strategies that contribute to career advancement during the appointment to a managerial position are qualifications; and experience which included experience gained at other academic libraries or at an ODL institution/Library;
- it was noted in the response to an open-ended question that ODL Library middle managers obtained other qualifications in addition to LIS qualifications, such as a Masters degree in Business Administration (MBA) and other related management courses;
- in the interviews it was pointed out that ODL services should be taught as part of LIS curriculum; and that senior managers in the ODL Library management hierarchy should hold advanced qualifications;
- it was explained that experience compliment formal qualifications since the two go hand in hand;

- institutional documents revealed that in accordance with certain policy stipulations ODL experience can be enhanced by means of secondment, acting appointment or transfer to another post in the ODL Library structure;
- during the interviews strategies that influence the career path were discussed, namely the practising of secondary management roles, networking and the value of secondments and mentorship;
- obstacles to the appointment to the ODL Library middle manager position were ascribed to the fact that there was no career plan or succession plan, the lack of vacancies, and the fact that only contract appointments were available.
- Secondly, understanding the LIS environment, management activities and respective roles and the ODL Library strategic plan contribute to optimising the ODL Library middle managers' career paths;
- the most important career development strategies which were identified as critically important are attending management training; leadership development; participating in special projects; IT training; career planning, followed by development strategies which were rated as very important, namely coaching; professional networking; use of action planning; ODL Library experience; 360 degree assessment and the use of ODL networking;
- development strategies which were perceived as significantly less important are Recognition of Prior Learning (RPL); counselling; and KM training;
- during the interviews leadership development and experience gained through secondment were accentuated and it was explained how this development should be done;
- institutional documents revealed that RPL is acknowledged by the ODL institution and when an RPL learner has been declared ready to enter formal training the institution provides the necessary support to bridge any gap found;
- institutional documents, such as the institution's personal development plan which is completed annually, revealed that leadership development strategies are encouraged;
- the institution is in the process of establishing a staff development practice through a Talent Management plan to attract new staff and retain existing

staff since Talent Management contributes to a competent and motivated workforce, capable of delivering on their extensive educational experience and building the specialised educational capacity and capabilities required by the institution's unique ODL model;

- in the open-ended question in the questionnaire, it was suggested that ODL Library middle managers be trained specifically in the values of servant leadership;
- the value of networking and secondment during which skills can be practised was pointed out during interviews;
- managers explained during interviews that a platform should be provided to practice learning outcomes, in order to benefit from development strategies;
- a comparison of the perceived importance of the respective development strategies with the successful use thereof indicates a need for improved use of all strategies;
- section 4.4.3 summarises the findings of Research question 4.3.

4.4.4 Importance and use of competencies as facilitators of career success

- quantitative respondents rated the impact of selected managerial competencies on optimising the ODL Library middle manager's career path as high. The order of critical important ratings are: planning and administration; emotional intelligence and self-management, communication; teamwork; strategic thinking; and globalisation;
- globalisation was perceived as the less important competency;
- interviews revealed that the insignificance of globalisation compared to other competencies can be ascribed to the fact that in the ODL environment globalisation is no longer considered to be different from the local environment;
- the importance of selected competencies was confirmed during interviews but the order of importance differs;
- the development of strategic action competency through participation in the strategic planning of the ODL Library was accentuated;

- a comparison of the perceived importance of the respective competencies with the successful use thereof indicates a need for further development of all competencies;
- during the interviews it was revealed that support for practicing competencies is required;
- section 4.4.4 summarises the findings of Research question 4.4.

The above summary presented the main findings from data collected for this study. It provides a discussion on the highest rated success criteria in accordance with the perception of ODL Library middle managers and their use thereof, as well as the main factors, strategies and competencies which influence the ODL Library middle manager's perceived career success. This includes factors and development strategies that facilitate the successful appointment of ODL Library middle managers as well as factors, development strategies, approaches to development and competencies that impact on an optimal career path. Chapter Four provides a presentation of the results and findings relating to the relevant research area.

The data presented in Chapter Four is elaborated upon and interpreted in Chapter Five.

CHAPTER FIVE: ANALYSIS AND INTERPRETATION OF DATA

5.0 INTRODUCTION

In this chapter, Chapter Five, the data presented in Chapter Four is further discussed. Based on the findings of the literature review in Chapter Two, it was proposed that selected development factors and strategies (including competencies) influence the development of middle managers and subsequently ensure a successful career path. It was envisaged that these factors and strategies could be investigated in an ODL Library environment to provide an answer to the question as to what influences the career path of middle managers in this environment.

This chapter, Chapter Five, is concerned with providing the answers, based on the research data collected and extracted from closed and open questions in a survey questionnaire, qualitative data collected through interviews and data collected from institutional documents. The analysis in this chapter is presented in such a way as to further elaborate on the results of the application of the analysis strategy set out in Chapter Three, and in this process verify the internal consistency reliability of the ten career advancement concepts of what career success implies, strategies to further career progression, internal and external factors that impact career progression and the six career-competencies identified and discussed in Chapters Two and Four. The chapter then reports on how calculated perception measures of the named career advancement concepts further inform the questions of the study, namely

- How do ODL Library middle managers view success?
- How important are external factors and development strategies in facilitating the successful appointment of ODL Library middle managers?
- What are the importance-perceptions of middle managers of identified development factors and strategies for an optimal career path? Here the sub-research questions ask the following
 - How do middle managers perceive the importance of internal/external factors on career success?
 - What are the importance-perceptions of middle managers of identified career development strategies on career success?
 - What are the importance-perceptions of middle managers of identified competencies on career success?

The analysis of results discussed in the chapter include: scale reliability test results (section 5.1.1), followed by the presentation and interpretation of participant perception measures - referred to as perception scores - of the ten career progression concepts of perception of what career success implies and personal attainment of success (section 5.1.2.1), perceived importance of appointment/ or internal factors (5.1.2.2), the perceived importance of external factors (section 5.1.2.3), the perceived importance and use of development needs (section 5.1.2.4) and development strategies (5.1.2.5) and perceived importance of six career competencies (section 5.1.2.6). The quantitative section of this study then concludes by investigating the relationship between participants' perceived importance of career promoting concepts and their perceived experience of success attainment. This is addressed by means of a matrix of Spearman correlations coefficients (section 5.1.3).

5.1 PRESENTATION OF THE ANALYSIS

In accordance with the case study tactics explained in section 3.3 (Table 7), this study applied related tactics during the data collection phase to ensure construct validity; and developed a case study data base in support of the reliability of the study. In the first part of this chapter, Chapter Five, the validity of the study is further demonstrated. Internal validity is demonstrated through the results which are presented in tables, each table with an introductory description.

The results of analyses will be presented in the same sequence as the analysis strategy for quantitative data detailed in Chapter Three. The table that lists the variables and indicates the analysis strategy sequence for quantitative data presented in Chapters Three and Four applies to Chapter Five. In the second part of the chapter, the results of the analyses will be interpreted together with the qualitative data analysis relating to open-ended questions in the questionnaire, interview responses and the examination of institutional documents are presented together with the quantitative results. Similar to the quantitative data analysis, the planning of qualitative data analysis was guided by the research questions to be answered and related themes.

5.1.1 Scale reliability

A scale reliability test was done to verify that listed elements of success-effect jointly relate to the success-effect investigated. The composite frequency tables of participant responses to the mentioned six career advancement concepts presented in Chapter Four (please refer to the Table 11 analysis legend) provided a general overview of how participants perceived these career advancement concepts. In this regard, Tables 13-28 were included in Chapter Four (excluding the tables suffixed with an “a” indicated in Table 11).

Against this background of participant general perceptions this research now asks whether measures (“scores”) of participants’ perceptions can be reliably calculated from the presented data, and, whether the biographical properties of participants influence their perceptions of specific career advancement concepts. How reliable such to-be-calculated perception measures will be can be determined by means of scale reliability tests (the results of which are presented in Table 12a). Once internal consistency reliability of specific career advancement constructs (listed below) have been established the measures (“scores”) for each participant for each of the six career promotion concepts can then be calculated. These scores are calculated as the mean value of the rating-responses each participant awarded to the subset of questions that described a career-advancement concept. Furthermore, mean perception scores for the entire sample, as well as for groups of participants (for example, *language-*; *age-* and *number of job-changes* groups) then serve to illustrate whether biographical properties influence perceptions of aspects of career advancement.

Scale reliability tests were therefore conducted on the 10 subsets of participant rating responses to the groups of questionnaire responses that describe and evaluate the concepts of

- Career success and perceptions of personal attainment of success
- Perceived importance of attention to career strategies to promote career advancement
- Perceived importance of attention to development strategies to advance career progression

- Perceived personal success in applying /using career strategies to promote career advancement
- Perceptions of the importance of internal factors to promoting career progression
- Perceptions of the importance of six competencies to promote career progression, namely
 - Communication
 - Planning
 - Teamwork
 - Strategic thinking
 - Globalisation and
 - Emotional intelligence and self-management

The summary results of the scale reliability tests are presented in Table 12a below. The Cronbach alpha coefficients reported for each analysis (each row of the table represents a separate analysis) evaluate internal consistency reliability: Cronbach alpha values in the region of 0.7 or greater than 0.7 confirm the internal consistency reliability of the specific career concept. Table 12a indicates that all (alpha values exceed 0.70) career advancement concepts complied with internal consistency reliability criteria. Therefore, it can be assumed that for each career concept the subsets of questionnaire questions, designed to describe a particular concept, jointly contribute towards describing the specific concept. Therefore reliable perception measures (“scores”) for each of the 10 concepts for each participant were calculated (for example, “development strategies” or “communication competency”).

The last column of Table 12a below reports the overall mean perception scores for each of the career promotion concepts evaluated. These calculated scores provide a first indication of participants' perceptions of the various career advancement concepts and are interpreted according to the importance Likert rating scale (or success rating) of the questionnaire (‘1’: critically important; ...‘5’: irrelevant). For example, the mean perception score for internal factors - with a mean score of 1.38 - indicates that the general perception of all participants is that internal factors are critically important to career progression (the value of 1.38 approximates ‘1’ – which reflects ‘critically important’ perception).

Table 12a: Scale reliability test

Results of scale reliability test to verify that listed elements of success-effect jointly relate to the success-effect investigated			
Success-effect/ concept	Elements/ items	Standardised Cronbach alpha value	Mean rating value for the success-effect
q13: Strategies	q13.1-q13.8	0.86	1.56 (0.65)
q14: Development strategies	q14.1 – q14.20	0.87	2.03 (0.76)
q15: Use of development strategies	q15.1-q15.20	0.89	2.36 (0.94)
q16: Internal factors	q16.1-q16.7	0.77	1.38 (0.53)
q17: Communication competency	q17.1-q17.7	0.76	1.53 (0.70)
q18: Planning competency	q18.1-q18.7	0.81	1.42 (0.60)
q19: Teamwork competency	q19.1-q19.8	0.79	1.50 (0.58)
q20: Strategic action	q20.1-q20.10	0.91	1.58 (0.56)
q21: Globalisation competency	q21.1-q21.6	0.81	1.62 (216)
q22: Emotional intelligence	q22.1-q22.11	0.89	1.45 (0.76)

5.1.2 Evaluation: career promotion constructs

The evaluation of the 10 career promotion constructs relates to a calculation of perception scores. As mentioned in the previous paragraph, perception measures (“scores”) for each of the constructs of *internal and external factors, strategies, competencies and the notion of career success* were calculated and perception score means for these constructs are presented in Tables 14a; 16a; 18a; 20a; 21a; 28a and 29a of this chapter. The sections which follow briefly discuss the deductions that can be derived from these tables and indicate how these complement and enhance the results of the composite frequency tables presented in Chapter Four.

5.1.2.1 Concept of career success

Mean perception scores for this concept pertain to importance and the success experience. Questions 7 and 8 of the questionnaire evaluate perceptions of career success. Results presented in Chapter Four (Table 13, importance perceptions, and Table 14, perceived personal success attainment) suggested a lag between perceived importance and perceived personal attainment of career success: a somewhat lower self-assessment of success measured against perceived expected success.

The mean perception scores in Table 14a of this chapter mirror this finding. The perceived importance- (expected) and perceived personal success mean perception scores of the career success concept (calculated according to language-; age-; and number-of-job-changes category-levels) indicate that mean scores for perceived personal success are higher than mean scores for perceived importance of the career success-concept. The higher personal success mean score, however, implies a lower perception of success attainment on the Likert rating scale: If kept in mind that a ratings score of '1' signifies 'critically important or very successful'; '2' signifies 'important/ or successful', to '5' that signifies 'irrelevant / or not successful at all', then higher scores for q8 will indicate lower perceptions of own success. (For example, when age groups are compared both the above and below 50-year age groups rated themselves lower (<50 mean = 2.54; > 50 mean = 2.36) than how they anticipate the importance or expectancy of the measure is (<50 years mean = 2.00; and >50 years mean = 2.22).

The deduction can therefore be made that participants are aware of the importance of these indicators but that they experience that they themselves fall somewhat short of the perceived importance.

Table 14a: Mean importance rating: success indicators and perceived own successfulness

Mean importance rating for all success indicators and perceived own successfulness grouped according to age-, language- and job-changes groups				
Language				
		Mean score	Standard deviation	n₁ n₂
Afr/ Eng	q7:Definition/ importance success indicators	2.28	1.07	69
	q8:Perception of own success	2.47	0.90	70
African	q7:Definition/ importance success indicators	1.96	1.09	103
	q8:Perception of own success	2.46	1.24	106
Age				
< 51	q7:Definition/ importance success indicators	2.00	1.07	103
	q8:Perception of own success	2.54	1.21	106
>50	q7:Definition/ importance success indicators	2.22	1.12	69
	q8:Perception of own success	2.36	0.93	70
Job changes				
0-1	q7:Definition/ importance success indicators	1.93	0.99	54
	q8:Perception of own success	2.78	1.01	55
2 – 4	q7:Definition/ importance success indicators	2.11	1.12	79
	q8:Perception of own success	2.31	1.21	81
> 4 times	q7:Definition/ importance success indicators	2.26	1.16	39
	q8:Perception of own success	2.35	0.98	40

5.1.2.2 Concept of internal factors

Mean perception scores for this concept pertain to importance and success. Question 10 of the questionnaire probed participants' importance perceptions on internal environmental factors that facilitated their appointment to their current middle management positions. Table 16, Chapter Four, reported on the response patterns to these factors.

Table 16a below reflects the mean perception scores (perceived importance) - calculated for the categories of respectively, the age-, language- and number of job change levels. The listed perception means all approximate the value of 2 which signifies "important". This verifies the findings of Table 16 of Chapter Four. Furthermore, Table 16a of this chapter suggests that participants speaking African languages perceive internal factors more important than do Afrikaans or English speaking participants (mean scores of respectively 2.34 and 1.86); and younger

participants also perceive internal factors more important than do older participants (mean scores of 1.90 and 2.26); while the response group which has had more than 4 job changes also values internal factors slightly higher than do the 0-1 job-change group.

These findings indicate that language, age and the number of job-changes made, seem to influence perceptions of importance of internal factors to career advancement: inexperienced younger participants and participants who have made a number of job changes regard internal factors as slightly more important than do other age and job-change participant groups. The views regarding internal factors shared by the group of older participants and the Afrikaans or English speaking participants may relate to the fact that the older group includes primarily these two language groups. Internal factors such as aspiration, determination, hard work and ability may be perceived as more important by aspiring managers at the start of their career.

Table 16a: Mean perception scores: Factors of importance to appointment in current position

Mean perception scores of importance of factors to appointment in current position				
Language				
		Mean score	Std dev.	n₁ n₂
Afrikaans/ English	q10:Factors,contribute success	2.34	1.02	82
African	q10:Factors,contribute success	1.85	0.95	132
Age				
<50	q10:Factors,contribute success	1.90	1.00	132
50+	q10:Factors,contribute success	2.25	0.96	82
No of Job changes				
0 – 1	q10:Factors,contribute success	2.15	1.03	65
2 – 4	q10:Factors,contribute success	2.00	0.96	101
4+	q10:Factors,contribute success	1.95	1.07	48

5.1.2.3 Concept of external factors

Mean perception scores for this concept pertain to importance and success. Question 12 of the questionnaire requested participants to rate external factors on their perceived importance in securing their appointment in their current middle management position. Table 21 of Chapter Four reports the distribution of

importance rating responses for each factor which suggests that participants tended to be unsure whether the listed external factors are important to their appointment. Table 21a presented below reflects the mean perception score for the external factors-concept calculated according to respectively age-; language-; and number-of-job-change levels.

The mean importance scores for external factors reported in Table 21a below suggest a great level of indecision (score values close to '3') regarding the importance of external factors to career success. With regard to job changes and age, the table reports that participants who have more than four job changes and those who are older (>50 years) perceive external factors to be unimportant to career progression (mean scores of respectively 3.60; 3.65;and 3.56, which all approximate '4' – the 'not important' rating-level).

Table 21a: Mean perception scores for the relevance of external factors to appointment in current position (importance)

Mean combined importance rating for relevance of external factors to appointment in current position				
Language				
		Mean score	Standard deviation	n₁ n₂
Afr/Eng	q12: External factors, appointment	3.4	1.26	79
African	q12: External factors, appointment	3.4	1.29	119
Age				
<50	q12: External factors, appointment	3.38	1.25	116
50+	q12: External factors, appointment	3.56	1.31	82
No of Job changes				
0 – 1	q12: External factors, appointment	3.60	1.26	61
2 – 4	q12: External factors, appointment	3.25	1.16	90
4+	q12: External factors, appointment	3.65	1.46	47

5.1.2.4 Concept of career-success after appointment

Mean perception scores for this concept pertain to importance and the success experience. Question 13 of the questionnaire evaluated the development needs and

environmental understanding of participants towards performing (career success) in middle management positions (Table 18 of Chapter Four). Likewise, question 16 of the questionnaire evaluated the relevance of internal innate or developed factors to career advancement (Table 22 of Chapter Four). The results reflected in both these tables of Chapter Four overwhelmingly suggest these concepts are perceived to be important in performing the role of ODL Library middle managers. Table 18a presents the mean perception scores for the relevance (importance) of addressing development needs in order to perform in the current middle manager position and advance careers. The mean perception scores of these two career concepts (calculated for the various age, language and number of job changes categories) reported in Table 18a below, approximates, in nearly all cases, a rating of '1' which signifies 'critically important' and which agrees with the preliminary findings of Chapter Four (Table 22).

Table 18a: Mean perception scores of development needs

Mean combined importance rating of internal factors to performing in appointed current position					
number job changes	job	Label	Mean	Std Dev	N
0 – 1		q13:Develop, needs after appointment	1.51	0.50	88
		q16:Competencies in present work	1.48	0.50	75
2 – 4		q13:Develop, needs after appointment	1.58	0.70	135
		q16:Competencies in present work	1.31	0.52	119
4+		q13:Develop, needs after appointment	1.58	0.73	64
		q16:Competencies in present work	1.38	0.56	56
Age groups					
<15		q13:Develop, needs after appointment	1.54	0.63	175
		q16:Competencies in present work	1.32	0.51	152
50+		q13:Develop, needs after appointment	1.58	0.68	112
		q16:Competencies in present work	1.46	0.54	98
Language groups					
Afrikaans/ English		q13:Develop, needs after appointment	1.75	0.73	112
		q16:Competencies in present work	1.46	0.52	98
African		q13:Develop, needs after appointment	1.43	0.56	175
		q16:Competencies in present work	1.32	0.52	152

5.1.2.5 Concept of career strategies

Mean perception scores for this concept pertain to importance/performance (use) of career strategies. Question 15 of the questionnaire probed perceptions regarding the personal application value of development strategies (personal attainment/success) for continued career progression while Question 14 of the questionnaire probed perceptions of the relevance of these same strategies. The frequency response patterns to each of the 20 strategies were reported in Tables 19 and 20 of Chapter Four respectively. These results suggested that application of development strategies corresponded with perceived importance, but that practical application of development is slightly short of perceived importance of skills developed through the strategies.

Table 20a below reports the mean perception scores for both the career-concepts of perceived relevance and perceived personal application of development strategies - towards career advancement. Table 20a verifies the Chapter Four suggestion: Table 20a suggests that the mean perception scores for the concept of use-of-strategies (q15) is slightly less than that of perceived importance of development strategies (q14). This is suggested to varying degrees for most categories of the biographical properties (for example, for the younger age group these mean scores are respectively 1.92 and 2.31; for the African population group these mean scores are respectively 1.88 and 2.26)). In other words, these figures - which all approximate an 'importance' rating – indicate the value participants attach to career strategies.

Table 20a: Mean perception scores: Strategies of importance to perform in current position

Table 20a Mean perception scores for the career-concepts of the relevance and application of development strategies towards performing in an appointed position					
Number job changes	Variable	Label	Mean	Std Dev	N
0 – 1		q14:Importance development strategies	2.00	0.71	211
		q15: Use development strategies?	2.40	1.01	210

Table 20a Mean perception scores for the career-concepts of the relevance and application of development strategies towards performing in an appointed position				
Number job changes Variable	Label	Mean	Std Dev	N
2 – 4	q14:Importance development strategies	1.97	0.81	333
	q15: Use development strategies?	2.31	0.93	323
4+	q14:Importance development strategies	2.16	0.69	159
	q15: Use development strategies?	2.36	0.82	159
Age group	Label	Mean	Std Dev	N
<15	q14:Importance development strategies	1.92	0.78	426
	q15: Use development strategies?	2.31	0.99	417
50+	q14:Importance development strategies	2.17	0.70	277
	q15: Use development strategies?	2.41	0.83	275
Language group	Label	Mean	Std Dev	N
Afr/Eng	q14:Importance development strategies	2.25	0.72	279
	q15: Use development strategies?	2.49	0.87	275
African	q14:Importance development strategies	1.87	0.75	424
	q15: Use development strategies?	2.26	0.96	417

5.1.2.6 Concept of career competencies

Mean perception scores for competencies pertain to the importance and use of communication, planning, teamwork, strategic thinking, globalisation and emotional intelligence and self-management. Questions 17-23 of the questionnaire probed perceptions regarding the importance of competencies. In Chapter Four, tables 23-28 report the frequency response patterns of participants' perceptions of the relevance of the competencies of communication, planning and administration, teamwork, strategic thinking, globalisation and emotional intelligence and self-management towards furthering of career advancement. In this chapter, Chapter Five, Table 28a elaborates on the deductions derived from Tables 23-28 of Chapter Four.

The mean perception scores of Table 28a suggest that participants perceive the

competencies of communication, planning, teamwork, strategic thinking and emotional intelligence and self-management as very important/ relevant to career advancement and performance (most of these mean perception scores fall in the 1 to 1.5 value-range which signifies 'critically important' to 'approaching critical importance'). In contrast, participants perceived the globalisation competency as less critical to career advancement since the mean perception scores for this competency varied between 1.67 to 1.95, or approximately '2', which indicates an 'important' perception (but not 'critically important'). This was also suggested by the results reported in Chapter Four.

The mean rating values of the responses to the six questions (Question 24) on how successful participants perceive they are in personally implementing mentioned competencies are reported in Table 29a. These means are reported against the overall importance-perception means of competencies (Table 28a). The mean scores indicate how participants score their own perceived use/application of competencies somewhat lower than the importance they attach to these competencies. For example, the perceived importance rating for the competency of planning and administration is recorded as 1.42 (which approximates a '1' or 'very important' rating) whereas the corresponding perceived use/successful application of this skill is 1.83, which approximates a '2', or 'successful' rating (but not a '1' or 'very successful' rating). The lag/or gap between perceived importance and successful personal application is also illustrated for the globalisation competency where the perceived successful application mean (2.50) suggests a 'neither successful/ nor unsuccessful' perception of personal achievement and an importance perception of the competency (1.62) suggests an 'important' rating. This verifies the provisional findings of Chapter Four.

Table 28a: Mean perception scores for the relevance of competencies

Mean importance rating for communication, planning, teamwork, strategic thinking and emotional intelligence competency perceptions				
Number job changes	Label	Mean	StdDev	N
0 – 1	q17: Communication competencies	1.55	0.66	76
	q18: Planning competencies	1.49	0.59	77
	q19: Competencies re teamwork	1.54	0.50	88
	q20:Key competencies, Strategic	1.48	0.51	121
	q21: Key competencies: Global	1.48	0.90	66
	q22:Emotional Intelligence as Key competency	1.48	0.51	121
2 – 4	q17: Communication competencies	1.45	0.67	119
	q18: Planning competencies	1.37	0.55	119
	q19: Competencies re teamwork	1.41	1.41	136
	q20:Key competencies, Strategic	1.36	0.62	187
	q21: Key competencies: Global	1.67	0.66	102
	q22:Emotional Intelligence as Key competency	1.36	0.62	187
4+	q17: Communication competencies	1.66	0.79	56
	q18: Planning competencies	1.41	0.56	56
	q19: Competencies re teamwork	1.62	0.60	153
	q20:Key competencies, Strategic	1.57	0.76	88
	q21: Key competencies: Global	1.81	0.64	48
	q22:Emotional Intelligence as Key competency	1.57	0.76	88
Language group	Label	Mean	Std Dev	N
Afr/Eng	q17: Communication competencies	1.71	0.71	98
	q18: Planning competencies	1.51	0.52	98
	q19: Competencies re teamwork	1.75	0.61	112
	q20:Key competencies, Strategic	1.85	0.52	140
	q21: Key competencies: Global	1.91	0.54	84
	q22:Emotional Intelligence as Key competency	1.57	0.59	154
African	q17: Communication competencies	1.41	0.66	153
	q18: Planning competencies	1.36	0.59	154
	q19: Competencies re teamwork	1.34	0.49	176
	q20:Key competencies, Strategic	1.40	0.51	220
	q21: Key competencies: Global	1.71	0.84	132
	q22:Emotional Intelligence as Key competency	1.37	0.64	242
Age group	Label	Mean	StdDev	N
<15	q17: Communication competencies	1.46	0.64	153
	q18: Planning competencies	1.44	0.60	154
	q19: Competencies re teamwork	1.40	0.55	176
	q20:Key competencies, Strategic	1.48	0.56	220
	q21: Key competencies: Global	1.79	0.83	132
	q22:Emotional Intelligence as Key competency	1.38	0.62	242
50+	q17: Communication competencies	1.63	0.76	98
	q18: Planning competencies	1.38	0.51	98
	q19: Competencies re teamwork	1.65	0.59	112
	q20:Key competencies, Strategic	1.72	0.52	140
	q21: Key competencies: Global	1.78	0.58	84
	q22:Emotional Intelligence as Key competency	1.55	0.63	154

Table 29a: Rating means and deviations: Personal attainment and importance of managerial competencies

Rating means (and standard deviations) for all respondents on perceived personal attainment and importance of previously identified managerial competencies		
Competencies	Perceived personal success on managerial competencies	Perceived importance of managerial competencies
	Mean (Std dev)	Mean (Std dev)
Communication	2.00 (0.986)	1.53 (0.70)
Planning and Administration	1.83 (0.856)	1.42 (0.60)
Teamwork	1.75 (0.967)	1.50 (0.58)
Strategic action	1.97 (0.971)	1.58 (0.56)
Globalisation	2.50 (0.878)	1.62 (216)
Emotional intelligence and self-management	1.89 (0.919)	1.45 (0.76)

5.1.3 A matrix of correlations

A correlation exists if, when one variable increases or decreases, another variable increases or decreases in a predictable fashion (Leedy and Ormrod 2005:180). A matrix of correlations in this study indicates to the relationship between perceptions of attained success and perceived importance of career-advancement strategies and competencies. At this stage research asked the question of whether perceptions of the relevance/importance of factors and strategies to career advancement and personal perceptions of attained career success are related.

To investigate this issue, variables were identified that could serve as measures of 'personal success attainment' and 'factors or strategy-importance': namely measures of participants perceptions of 'how successful they are', versus measures of the 'importance perceptions' of strategies, factors and competencies which facilitate appointment to ODL Library middle manager positions.

- **Identification of importance measures of factors, strategies and competencies that facilitate appointment in ODL Library middle manager positions**

Variables identified as measures of importance perceptions included:

Question 9: Qualifications as a strategy (Qualifications Strategy Question 9, with label, 'QualStrategyQ9' in Table 31) - in this regard the number of activities were counted to form a measure – not an average calculation.

Question 10: Factors or contributors to appointment (Prior appointment factors, with label 'PriorFactorsQ10' in Table 31) – an average rating was calculated.

Question 11: Other strategies (Prior appointment Strategy Question 11, with label 'PriorStaregyQ11 in Table 31) – the number of activities counted served as measure for this variable.

Question 12: External factors (Prior appointment External Factors Question 12, with label 'PriorExternalQ12' in Table 31) – an average rating was calculated.

Also, importance perceptions of factors, strategies and competencies for successful performance in the ODL middle manager post after appointment as follows:

Question 13: Development needs and satisfying these needs (Post appointment Development Needs Question 13, with label, 'PostDevNeedsQ13 in Table 32) – average rating.

Question 14: Strategies for successful performance in a post (Post appointment Strategy Question 14, with label, 'postStrategyQ14' in Table 32) – average rating.

Question 16: Internal factors (Post appointment Internal Factors Question 16, with label, 'PostIntFactorsQ16' in Table 32) – average rating.

Questions 17 – 22: Competencies of communication, planning, team work, strategic action, globalisation, emotional intelligence and self-management (Post Competencies Communication Question 17, Post Competencies Planning Question 18, Post Competencies Team Question 19, Post Competencies Strategic Action

Question 20, Post Competencies Globalisation Question 21, Post Competencies Emotional intelligence Question 22, with labels 'PostCom...Q17-Q22, in Table 32) - average rating.

- **Identification of variables that could serve as measures of perceived personal success towards career advancement, or performance or appointment in ODL middle management positions**

In this regard, the participants' own perceptions of success experience were measured. Question 8 ("To what extent do you think you are successful based on the position in the hierarchy; recognition of the person's expertise and competencies and subsequent respect gained from colleagues for work done; positive effect of the person's work on the organisation; achievement on a personal level such as work life and home life balance); and performance during an assessment of the annual performance by the line manager) gives an indication of how successful the participants consider themselves for appointment to an ODL Library middle manager post. Each of the five sub-questions of Question 8 – as well as the mean rating of these five events - can be a perceived success indicator to measure how successful participants consider themselves for appointment to a post (Labels Q0008_0001 to q0008_0005 in Table 31 as well as label 'PriorSuccessRatingQ8, which presents the mean of the aforementioned five ratings).

Similarly, Question 24 ("To what extent do you think you are successful in the management competencies of communication, planning, teamwork, strategic thinking, globalisation and emotional intelligence and self-management) of the questionnaire gives an indication of how successful the participants consider themselves in their current ODL middle manager post. These six sets of ratings – as well as the mean rating value of these competencies serves as further indicator of perceived success (Labeled, 'Q0024_0001' to 10024_0006' and 'PostCompSuccessQ24' in Table 32).

5.1.3.1 Calculation of a matrix of Spearman correlations

The following correlations pertain to perceived success in being appointed and perceived importance or the impact of factors and strategies in being appointed.

Caswell (1982:137-139) and Chok (2008:4-5) explain how success in statistics can be achieved through Spearman correlations. In Table 31, Spearman correlations between perceived success in being appointed and perceived importance/ or impact of factors and strategies in being appointed are presented because some measures were measured on a nominal scale.

Table 31: Spearman correlations: Success in being appointed and perceived importance of factors and strategies in being appointed

Reported in each cell of the table are: Spearman Correlation Coefficients; Prob > r under H0: Rho=0; Number of Observations				
	QualStrategyQ9	PriorFactorsQ10	PriorStrategyQ11	PriorExternalQ12
PriorSuccessRatingQ8	-0.03 0.81	0.11 0.51	-0.18 0.28	0.01 0.91
q0008_0001 Advancement in hierarchy	-0.05 0.74	0.31 0.06	-0.43 0.01	0.25 0.13
q0008_0002 Respect received due to competency	-0.44 0.01	0.04 0.81	-0.04 0.80	-0.1 0.49
q0008_0003 Positive impact of a person's work	0.12 0.48	0.37 0.02	-0.15 0.40	0.01 0.93
q0008_0004 Work life/ personal life balance	0.27 0.10	-0.13 0.44	0.09 0.59	-0.13 0.42
q0008_0005 IPMS assessment rating	-0.11 0.51	-0.15 0.37	0.06 0.72	0.16 0.34
Experienced success rating legend: 1 = most successful ; 2 = successful; 5 = not at all successful perceived importance rating: 1 = critically important ; 2 = important; 5 = irrelevant				

Deductions

The table indicates to a statistically significant correlation between number-of-q11-strategies (approaches)-followed and experienced-success-in-career-advancement (r= -0.43 on the 5% level of significance). Furthermore, a statistically significant correlation is indicated between q9- number-of-qualifications-as-strategy and success-experience-aspect-of-respect earned (r= -0.44; 0.1% significance level); as well as between perceived-q10-strategy-importance and positive-impact-on-others-success-experience of participants (r= 0.38; 5% significance level).

The negative correlation, for example, for the number-of-qualifications-perceived-importance and respect-aspect-success-experience should be carefully interpreted: the negative sign implies an inverted relationship – as the one scale increases the other decreases: therefore, more qualifications are associated with greater levels of

success-experience (1 = very successful experience, up to success score of '5' = not successful at all). This implies that as the number of qualifications increase perceptions of success (as earned respect) increase.

In the same way (but interesting in another sense), the negative but significant correlation between experience of being successful-at-impacting-work /life balance and appointment-importance rating of q10-contributing-factor-to-success, indicate that higher experience of being successful (lower q0008_00003 mean scores) correlates with higher PriorFactorsQ10 mean scores (higher ratings on the importance scale actually tends to irrelevance). Thus, success-experience of impacting-work'-live balance is inversely related to appointment-importance rating.

5.1.3.2 Pearson correlations: career advancement measures

Caswell (1982:134-137) and Chok (2008:4-5) explain how success in statistics can be achieved through Pearson correlations. Table 32 reports Pearson correlation coefficients between variables identified as potential success-experience variables and variables identified as importance-perceptions-of-strategies-to-further-career-success. Pearson correlations were calculated in this instance since all measurements were reported as continuous scale values.

Table 32: Pearson correlations: Personal success-attainment and perceived-importance-of-strategies-to-career advancement- measures

Spearman Correlation Coefficients, N = 36									
Prob > r under H0: Rho=0									
	PostDev Needs Q13	PostStra tegy Q14	PostInt Factors Q16	Post Communi cation Q17	Post Plan- ning Q18	Post Team- work Q19	Post Strategic action Q20	Post Globali- sation Q21	Post /EI Q22
PostCompSuc cessQ24	0.11 0.48	0.22 0.18	0.12 0.46	0.11 0.52	0.18 0.28	0.03 0.85	0.23 0.16	0.04 0.79	0.20 0.22
q0024_0001 Communication	0.12 0.45	0.16 0.33	0.04 0.77	-0.02 0.89	0.12 0.45	-0.10 0.55	0.07 0.68	-0.09 0.57	0.04 0.79
q0024_0002 Planning and Administration	0.04 0.78	0.11 0.49	0.06 0.69	-0.01 0.93	0.15 0.35	-0.02 0.90	0.10 0.52	-0.00 0.96	0.03 0.82
q0024_0003 Teamwork	0.18 0.27	0.22 0.17	0.00 1.00	0.03 0.82	0.12 0.46	0.04 0.79	0.24 0.14	-0.05 0.76	0.03 0.84
q0024_0004 Strategic action	0.09 0.58	0.11 0.51	0.04 0.78	0.10 0.52	0.22 0.18	-0.06 0.71	0.12 0.45	-0.00 0.98	0.11 0.49
q0024_0005 Globalisation	0.12 0.45	0.29 0.07	0.32 0.05	0.23 0.15	0.17 0.31	0.13 0.44	0.30 0.06	0.16 0.32	0.37 0.02
q0024_0006 Emotional intelligence and self- management	-0.02 0.90	0.17 0.31	0.14 0.40	0.18 0.27	0.07 0.67	0.17 0.30	0.27 0.10	0.22 0.17	0.39 0.01
Experienced success rating legend: 1 = most successful ; 2 = successful; 5 = not at all successful perceived importance rating: 1 = critically important ; 2 = important; 5 = irrelevant									

Deductions

On the 5% level of significance, significant correlations were indicated for feelings of success-achievement-linked-to-globalisation and perceived importance of Emotional Intelligence to success ($r = 0.38$) – if Emotional intelligence is perceived to be important to good performance in a position, feeling of being successful in globalisation aspects is higher.

Table 32 also reports a statistical significant correlation on the 5% level between feelings of being-successful-on-Emotional intelligence-aspects and perceived importance of Emotional intelligence to being successful ($r=0.39$).

If Emotional intelligence is perceived to be more important, participants experience more of a feeling of success in Emotional intelligence matters.

On the 10% level more significant correlations can be identified (in blue).

This part concludes the presentation of mean perception scores and the discussion of the matrix of correlations. The second part of Chapter Five which follows after this section, presents the analysis of the research findings.

5.2 DATA ANALYSIS AND INTERPRETATION

The statement of the problem of this study pertained to the ability to manage on the middle level of the academic library environment which has become a managerial competency. There was an uncertainty as to what factors and strategies facilitate the appointment of librarians to the position of Library middle management operating in an ODL academic environment, or an understanding of how the development can be facilitated after the appointment of ODL Library middle managers. No documented study at the only ODL Library in South Africa had investigated why this was required and how the matter can be addressed. A review of the literature revealed that there was a need for library middle management development in general; and that library science theories had not comprehensively investigated the need for middle management development in the context of different types of libraries. Examples of library science theories discussed in Chapter Two, section 2.3, relate to critical realism theory, fuzzy set theory, probability theory, grand unified theory and grounded theory. Following the synthesis and evaluation of library science theory in Table 6, the problem of ODL Library middle management development in the ODL context was discussed in terms of organisational theory. A clear understanding of factors that facilitate the appointment of librarians to the position of Library middle management operating in an ODL academic environment and an understanding of how the development can be facilitated after the appointment of a Library middle manager, had to be gained for future consideration of ODL Library middle management development. The focus throughout the study was subsequently on ODL Library middle management development with a view to determine ‘what development strategies and factors facilitate an optimal career path for ODL Library middle managers?’

In order to get answers to the question, the study was guided by a map of the research literature in the form of a conceptual framework (Figure 1) which was

explained in section 2.1.2 of Chapter Two. The study benefitted from this framework as it showed the relationship between concepts and the phenomenon under investigation. This provided a logical flow in examining concepts and coherence as the selected variables provided clarity on what the research needed to accomplish. Information in this regard was gained from a literature review which provided the theoretical perspective flowing from library studies and from documents on the topic within the ODL environment. Related studies in the LIS field provided insight as to what has been researched to cover the topic of development in libraries and influences on the middle manager's career path.

Using the data presented in Chapter Four, the reliability of the data could be further established in Chapter Five before interpretation commenced. The interpretation was made possible through the combination of data collected from the multiple sources of information discussed in Chapter Three, section 3.3.1.1. This allowed for pattern matching in support of conclusions or inferences. Multiple sources through triangulation benefitted the study as one of the strengths of triangulation is that it provides a firmer foundation for understanding when the interpretation of the data is done. In the case where the study was dependent on the input of ODL Library middle managers for the completion of the survey questionnaire or participation in interviews, a high response rate was received for both the collection of quantitative and qualitative data as demonstrated in sections 4.1.1 and 4.2 respectively.

Data analysis and interpretation in this study relate to the ODL Library middle managers' view of success; importance of external factors and development strategies and approaches in facilitating the successful appointment of ODL Library middle managers; and the importance of internal factors and development strategies, including competencies towards an optimal career path of ODL Library middle managers. These factors and strategies are integrated in the analysis phase of this study in order to present the influence of each of these parts on the career path holistically. Interpretation happened around the development concepts as they formed the basis for the research objectives and research questions provided in Chapter One and applied to the ODL Library.

5.2.1 ODL Library middle managers' perception of success

To find out what ODL Library middle managers understand success to mean, Questions 7 and 8 in the survey questionnaire and Question 1 in the interview protocol were posed to measure their understanding in terms of criteria for success described in the literature. These questions related to Research question 4.1. Questions 7 and 8 of the questionnaire listed five aspects of success and probed participants' perceptions of the importance of these indicators as measuring success (question 7) and how they themselves measured up against these success indicators (question 8). The two questions therefore looked at success expectations and perceptions of success achieved. These results are reported in Tables 13 and 14 respectively.

Deduction

Results revealed that respondents in general place a high premium on the success criteria since the total frequencies for *very important* and *important* account for 71.51% of the responses to these questions (61 + 62 of 172 reported frequencies). This is reflected in the last row of Table 13.

As mentioned in Chapter Two (section 2.3.4), the notions of career and career success, namely to grow within the hierarchy of the business as they have traditionally been known, are no longer valid (Sturges (1999)). This study therefore demonstrated support for the findings that career success should be expressed in terms of orientational categories representing different kinds of participating managers who express their career success differently. The categories provided a useful basis for the conceptualisation of personal dimensions of ODL Library career success. The interpretation of the results of this study could thus be done in accordance with the success categories of Sturges (1999:245-247), who states that managers' view of success relate mostly to the definitions of 'climbers' (aspiring to climb vertically in the management hierarchy); 'experts' (achievers of a high level of competency); 'influencers' (aspiring to have a positive effect on the institution); and 'self-realisers' (with a focus on balance between their work life and home life).

ODL Library middle managers were mostly categorised as 'Influencers' because the 'positive impact of a person's work on the organisation' was rated statistically significantly higher than the other criteria when response patterns for the criteria were compared. (Fisher's exact probability (Agresti 1992:131) calculated for a Chi-square statistic of 45.73 is less than 0.001 which indicates statistical significance on the 0.1% significance level). The criteria of *work-life balance and respect earned due to competency* were also perceived by ODL Library middle managers as strong indicators of success. This means that ODL Library middle managers can also be considered to be self-realisers in terms of the second highest critically important rating attached to this criterion. The high importance rating can be ascribed to a high premium that the ODL Library's management places on people. As discussed in section 2.3.3.6, Hellriegel et al. (2013:45) allude to the importance of balancing work and life issues as ability within the emotional intelligence and self-management competencies. This implies that the manager strikes a balance between work and other life activities so that neither aspect of living is neglected. This result can also be coupled to the high premium that ODL Library middle managers place on family as their support system on the ODL Library career path as indicated in the high rating of family life discussed in section 5.2.2.

The results on perceived ODL Library career success pertaining to 'respect earned due to competency' relate to the literature review in Chapter Two, section 2.7. Golden (2006:174;176), alluded to a paradigm shift in management resulting in a demand for efficiency of managers as the focus is more on the consumer and effectiveness; and the fact that there is an erosion of leadership stability as the baby boomers are leaving the workplace. The subsequent perception is that there is a shortage of managers with expertise and strong leadership capabilities in libraries as well as the need for expertise as a result of technological change. The results in this study on the success criterion pertaining to 'respect received by others' can be explained in terms of this shift alluded to by Golden (2006:176).

In section 2.7, Golden (2006:174; 176) also alludes to a shift in the approach to career development from organisational learning processes to additional strategies to facilitate middle manager career development. This trend is ascribed to the fact that traditional career models with an almost automatic growth in the hierarchy have

become obsolete. The insignificant finding in this study regarding the success perception of 'advancement in the hierarchy' demonstrates that ODL Library middle managers do not see themselves as 'Climbers', meaning that they do not only perceive their success in terms of their advancement in the hierarchy. A total of 48.56% rated the advancement in the hierarchy as neutral, not relevant or irrelevant.

Table 14 reported how respondents measure themselves against these criteria. The last row of the table, the row of totals, indicates that respondents in general perceive that they do not measure up to set perceived expectations in all respects (for example, the 56.25% *critically-/ important* total responses compared to the corresponding 71.51% total responses for the perceived *importance/ expectancy* of success probed in question 7, Table 13). Respondents' evaluation of their own success is more clearly understood in Table 14 if the response ratings of *critically-/ or important* in this instance are interpreted as *very successful/ or successful* perceptions: If the rating scale is interpreted in this way, the lag between the *critically important* and *important* response patterns indicate that for each criterion the percentage of *critically important* responses for question 8 (own success) had dropped from the corresponding percentage for question 7 (the perceived expected criteria of success/ or importance of success criterion). For the five criteria the percentages dropped from 14.29% to 2.86%; 33.33% to 20%; 64.71% to 48.57%; 48.57% to 27.78%; 20% to 2.86% respectively. The *neutral rating* frequency in contrast increased for the five criteria for questions 7 and 8 (Tables 13 and 14): 25.71 to 37.14%; 9.09 to 20%; 0.0% to 8.57%; 11.43% to 19.44%; 28.57% to 42.86%. This clearly indicates a shift towards somewhat lower self-assessment of success measured against perceived expected success. Figure 7 depicts the own success measured versus the importance thereof.

Questions 7 and 8 also provided an opportunity for participants to add more information in the open-ended question marked 'other'. Question 7 probed for additional success criteria. The two responses received to this question can mainly be viewed as comments on the identified success criteria. One response is a confirmation of the fact that success relates to an individual's input to the institution's success and the acknowledgement thereof by peers and top management. In terms of the fact that this success criterion rated statistically significantly higher than the

other criteria, it can be deduced that the participant accentuated this fact. The other comment pertained to the fact that institutional performance management assessment is of less or no importance. This comment also relates to the fact that the perceived importance of institutional performance management system (University of South Africa. Department of Human Resources, 2015) received the lowest statistical rating of all the other success criteria. It can be deduced that the participant therefore accentuated this fact. Also, the two open-ended responses received on Question 8, which prompted participants to add more information on how respondents perceive the way they measure up to the set expectations of success, can be considered as comments on the identified criteria as they explain the perceived low importance of institutional performance management (University of South Africa. Department of Human Resources, 2015). This was qualified by one response that indicated that 'own success' rather measures up to the fact that 'work must help the institution to succeed and me to grow further in the profession.' It was also mentioned that 'success is better described in terms of enjoying one's work. It can be deduced that in the context that it is mentioned, it refers to 'enjoying to see how both the institution succeeds while the person is growing in the profession'.

It was not clear to the researcher why the positive impact of a *person's work on the organisation* is rated statistically significantly higher than the other criteria when response patterns for the criteria are compared. During the interviews, this question (Question 1 in the interview protocol) was posed to the interviewees, namely the supervisor, manager, deputy director and director. A total of 100% of the managers representing the middle managers) explained why success is perceived as 'the positive effect of the person's work on the organisation'. They ascribed this to the fact that success relates to the impact of a person's work on client satisfaction and student throughput (supervisor, deputy director and director); and their impact on meeting the institution's strategic goals (manager and director). It was further explained how the success criteria can be internalised, namely through knowledge of how you perceive and create success respectively (supervisor), to be communicated during meetings or relevant training (deputy director); and through defining your role and purpose (deputy director and director).

ODL Library middle managers as 'influencers' reflect the spirit of the institution in

which the ODL Library middle managers operate. In Chapter Four (section 4.3.1), the review of the institutions' documents revealed that a high premium is placed on the institution's success. This is reflected in the institution's planning context which involves changes in the macro-economic level of the external environment to ensure institutional success; the institutional vision that reflects the excellence the university strives for globally and its mission that serves as a reminder of the fact that the ODL institution is guided by principles of innovation and creativity.

In concluding this part on the ODL Library middle manager's perception of success, the results pertaining to success criteria indicated in section 5.1.4 as part of a discussion on a matrix of correlations, revealed that perceptions of the relevance/importance of success criteria to career advancement and personal perceptions of attained career success are related. Results indicated that the participants' own perceptions of the success experience were measured, meaning that the response to these success definitions gives an indication of how successful the participants consider themselves for appointment to an ODL Library middle manager post. Each of the five sub-questions of Question 8 can thus be a perceived success indicator to measure how successful participants consider themselves to be for appointment to a post. This concludes the interpretation of this section which was a response to Objective 1 of this study, namely to determine how the concept of success is understood by middle managers in an ODL Library and the related Research questions 4.1 and 4.1.1.

5.2.2 Development factors and strategies as facilitators of the appointment

To further find out how ODL Library middle managers perceive the importance of external factors and development strategies in facilitating their successful appointment, Questions 9-12 in the questionnaire and Question 2 in the interview protocol were posed. These questions relate to:

The research question which suggests an investigation of perceptions regarding (i) factors; and (ii) strategies that promoted the appointment of the respondents in their current middle management positions. Closed-ended questionnaire items that probe aspects of the current appointment were included in questions 9-12; Question 2 in the interview protocol addressed this matter. Furthermore, the research question

addresses the three aspects of factors and strategies that facilitate *current appointments*, namely

- (i) Factors (q12, external factors)
- (ii) Experience and relevant qualifications as contributors to appointment in the current middle management position (q9, qualifications; q10, contributors)
- (iii) Strategies (q11, approaches)

The next three subsections report on participants' importance-perceptions of factors that promoted appointment for participating middle managers in their current positions (Tables 21, 21a); their importance-perceptions of contributors (Table 15) towards appointment in their current managerial positions; as well as their importance rating of development strategies towards this end (Table 18).

(i) Factors (external) that promoted appointment in middle management positions

The question relating to external factors as facilitators of an appointment to an ODL Library middle management position relates to Research question 4.2. Question 12 in the questionnaire requested participants to rate six external factors on their perceived importance in securing their appointment in their current middle management position. Table 21 reports the distribution of importance rating responses (the second entry in each cell reflects the percentage of frequencies for each rating level for a specific factor, for example, 'luck/ serendipity').

Deduction

Results revealed that participants did not perceive the listed external factors to be important to their appointment. This statement is based on the fact that 48.99% of the importance-responses were either *not important* or *irrelevant responses* (with an additional 24.7% *undecided* responses). The last row in Table 21, the row of totals, indicates this. Statistically significant differences in response patterns were, however, indicated (on the 5% level of significance) and this explains the 54.29% *critically important* and *important* response frequency to the external factor of family support.

In the open-ended question of Question 12, a total of 4 participants made mention of

significant external factors (hard work, experience and professional networking) as influences on a successful appointment to middle manager. The importance and subsequent impact of these factors and strategies were included in other sections of this study which analyses factors and strategies after the appointment. It can, however, be noted that these factors also reflect a general feeling of optimism as a facilitator on the early career path that led to the appointment of the ODL Library middle manager.

Chapter Two (section 2.8.3) relates to identified external factors by Farmer and Campbell (1998) and Golden (2006) and additional factors that relate to the environment in which the ODL Library middle managers operate. Similarly to this study, findings of four external factors also examined by Golden (2006:206-207) indicate that age and gender respectively do not appear to be perceived overall as being a significant influence on career success; that although 62% believed that luck and serendipity factored into their career development, only 42% believed that it was a significant contributor to career success; and that the highest frequency rate regarding geographic mobility occurs at 1 (lowest significance). The only external factor that contributed to career success was thus family support. This is a factor also identified by Farmer and Campbell (1998:104) as a significant external factor since they state that the difficulty of combining a family with a successful career seems to indicate unresolved difficulties.

Interview findings in this study explained the reasons as to why family support contributes to career success. The statement was explained by 75% of the respondents, namely the supervisor stated *'that family support contributes to career success as the family provides moral support'*; the deputy director explained that *'family assists with tasks at home'*, and the director accentuated the support provided by family *'when ODL Library middle managers need to work after-hours; need to further their qualifications after hours through formal courses; attend after-hours meetings; or travel extensively'*. The director explained that *'family support is important if ODL Library middle managers need to fulfill their aspirations'*. These aspirations must therefore be shared with family.

It was not clear to the researcher why the external factor 'employment equity' was rated as neutral, not important or irrelevant since the institution's documents place a

high premium on employment equity due to the fact that that it addresses aspects of equity and diversity which promote excellence, cultural enrichment and strength. During interviews, all the managers representing the middle managers (100%) explained the value of the institution's employment equity policy while also motivating why equity was rated low. The supervisor stated that the value of applying 'employment equity' pertains to *'the strengths of a diverse group in the workplace;* and the manager and director pointed at the fact *'that the playing field could be leveled'*. The manager explained that *'employment equity was, however, not always applied in the way it was intended to as employment equity appointees sometimes lacked knowledge; support was not provided to fill the experience gaps that an employment equity appointee with a qualification might have had'*. The director pointed out *'the resentment of the policy in general by all appointees, regardless of the fact whether the appointee was an employment equity candidate or not. This resulted in bitterness amongst people who are supposed to be 'receiving' through the relevant policy'*. It was therefore advised by the deputy director that *'the recently developed Talent Management Policy of the ODL institution should be implemented carefully and considered in terms of a succession planning development strategy'*.

The response received during interviews thus reflects to some extent different information than the results flowing from the quantitative data with regard to the importance of employment equity. The response is considered as a rival response as the general perception during interviews was that employment equity is only important if linked to development of the employment equity appointee. This was also confirmed in an open-ended response related to the question. Respondents were probed to provide other important development strategies to continue performing in the current middle management position. One response alluded to the importance of identifying EE appointees with a view to developing them to perform the role of an ODL Library middle manager.

(ii) Experience and qualifications as contributors to the appointment in current middle management positions

Question 10 probed participants' importance perceptions of six experience/qualification factors in their environment that facilitated their appointment in their current middle management positions. Table16 reports on the response

patterns to each of the six internal factors.

Deduction

The last row of Table 16, the row of totals, indicates that respondents perceived their qualifications and experience to be important development strategies to their appointment in their current positions. This reflects a different picture to that of responses to external factors probed in Table 21. Approximately 76% (75.70%) of *critically-/ important* responses were reported for the six factors pertaining to experience and qualifications. With a statistical significance of 0.1% attached to the hypothesis of no difference in response patterns for the six factors evaluated, it can be stated that the importance-response patterns to the last two factors, namely the relevance of previous work experience and the relevance of work-related qualifications, were regarded as very important to successful appointment in current positions.

In the next subsection the strategy relating to qualifications, experience and development approaches is reported. Strategies relating to qualifications and experience that promoted appointment in middle management positions can be further interpreted through responses received on qualifications (question 9) and experience (question 10). In this study, the results of Table 16 indicated that relevant qualifications were regarded as a factor that participants perceived to facilitate their successful appointment in their current positions. Table 15 summarised the qualifications that participating middle managers possess. This is depicted in Figure 8.

Deduction

Table 15 confirms the results of Table 16 in the previous subsection: if a library diploma or postgraduate library qualification, qualification and postgraduate qualification in LIS, are regarded as relevant qualifications, then 63.94% of responses reported relevant qualifications. When management qualifications are added, the percentage increases to 73.78%. If RPL qualifications are added, the total appropriate qualification responses add up to 75.42%. This figure strengthens the reliability of the 'importance' rating participants attach to relevant qualifications in

Table 16.

To find out what other qualifications were obtained by ODL Library middle managers to facilitate the successful appointment to the post of ODL Library middle manager, respondents were probed in an open question (Question 9) to provide details of additional qualifications to the qualifications listed. Eight persons listed additional qualifications obtained. This demonstrates the trend of obtaining not only LIS qualifications, but also management qualifications. It is, however, noted that no ODL qualification was reported.

The importance of qualifications and experience as development strategies to be appointed to a middle manager position was also indicated in the literature (Chapter Two) and in an examination of institutional documents. In section 4.3.2, the way the ODL Library middle manager's institution views training and development interventions is discussed. As part of its employee's reward strategy for employees, development and career opportunities are provided and a culture of learning is promoted. With regard to formal development of qualifications, institutional documents revealed that qualifications can be obtained through the University at a minimal cost to be paid by the ODL Library middle manager as payment for the enrolment will be made by the University from the study assistance budget, which is a central fund managed by the HR Development Directorate. This means that ODL Library middle managers have adequate development opportunities.

In section 2.8.1 it is explained that Golden (2006) adopted 'qualifications' as a career professional strategy identified by Farmer and Campbell (1998). In section 2.7 Golden (2006) explained how careers of middle managers have changed due to the nature of their work that has changed. Additional strategies are therefore needed to facilitate career development while addressing the need for leadership in management. New methods of professional advancement and more specifically additional professional qualifications are required. In section 2.8.1, the career development model of McGurk (2009:466), based on the research of Day (2001:582), which was conducted to consider how state-of-the-art development should be done in the context of ongoing organisational work (practice context), acknowledges development strategies which are key to management and leadership

development. These include a professional development strategy, essentially about qualifications.

During the interviews respondents representing the respective managerial levels explained the reasons why qualifications are important and how they could be enhanced through experience. It was accentuated by the manager that '*qualifications enabled a person to translate theory to practice*'; the deputy director and director stated that '*advanced qualifications on the LIS Master's level should be required to operate at the senior levels of the ODL Library management hierarchy*', and the deputy director advised that '*ODL Library middle managers should enrol for an ODL course*'. It was further pointed out by the manager that '*the context in which a person manages should become part of the LIS curriculum, meaning that there should be a component of ODL librarianship embedded in the relevant course*'.

Similarly to the quantitative findings of the importance of qualifications as a facilitator of an appointment, the importance of specific experience is pointed out in Table 16, in particular the number of years of work experience (and ODL experience) and academic library experience. In section 2.8.1 it was explained that Golden (2006) adopted 'experience' as a career professional strategy identified by Farmer and Campbell (1998); and in section 4.3.2, it was explained that the ODL Library middle manager's institution promotes experience through acting, secondment and transfer and that it formally recognises prior learning (University of South Africa, Department of Human Resources 2013:13-15).

The importance of experience was further pointed out during interviews:

Respondents representing the respective managerial levels were of the opinion that experience is a contributor to the appointment to a middle manager position. The supervisor explained that '*it would not have been possible to perform the role of middle manager without experience gained through mentorship*'; the manager accentuated that '*qualifications alone would not equip a person to operate as manager*'; and the deputy director explained that '*experience was a significant facilitator of the appointment as middle manager*'.

The findings in this section relate to Chapter Two (section 2.2.3) where it is

explained that Cronje et al. (2007:208-210), Cole and Kelly (2011:509) and Du Toit et al. (2012:304-306) place the various management development methods into categories which could be specified in a Personal Development Plan for implementation. This includes formal training through university courses, as well as knowledge to be gained by career strategies in support of experience.

This section summarises the formal qualifications obtained by ODL Library middle managers and the required experience (Tables 15 and 16), and point out the importance perception of these factors in promoting the appointment of ODL Library middle managers to the appointment to the middle management position. Both previous work experience and work-related qualifications are regarded as very important for appointment.

The next subsection reports on other strategies that facilitated the successful appointment in participants' current middle management position; (q11, approaches) to gain further information on the facilitators of a successful appointment to the ODL Library middle management position.

(iii) Development approaches that promoted appointment in middle management positions

In order to find out what other success enhancement strategies facilitated the appointment in the current ODL Library management position, statements were provided for selection if they applied to the appointment of the respective participants. Question 11 probed participants' importance perceptions on 13 development strategies/approaches that participating middle managers can/ did pursue to facilitate appointment to their current positions. Table 17 reports on frequency of use/ preference for these strategies noted by participants.

Deduction

The strategies most often indicated by participants involved *personal career planning* (18.12%); *performing secondary management roles* (15.63%); *attendance of management short courses* (13.12%); *a desire for career advancement* (12.50%); and *professional organisation networking* (11.25%). These results describe actions that suggest pro-active career planning to which success is linked.

The literature also alludes to these strategies as part of pro-active learning. In Chapter Two (section 2.2.3.1), Cronje et al. (2007:356;359) and Hellriegel et al. (2012:357) explain the role of the Learning organisation in support of developing managers pro-actively. The Learning organisation can act as facilitator of learning in accordance with the career plan. Regarding the performing of secondary management roles, in section 2.2.3.1 Raubenheimer (2004) alludes to pro-active career planning through the practicing of secondary leadership roles in a contemporary academic information service enterprise. In addition to primary leadership structures, secondary leadership structures accommodate leadership activities through staff participation in secondary leadership roles such as mentoring and coaching. Hellriegel et al. (2012:127) state that other building blocks of a learning organisation include strategic alliances and networks without boundaries, and the use of information whereby tacit knowledge is developed through shared problem-solving and organisational learning. In Chapter Two (section 2.6.1), Cole and Kelly (2011:489; 492; 502-503) also accentuate the importance of career planning and networking as career development strategies.

Qualitative data collected through interviews and a response to Open question 11 in the questionnaire which probed participants' importance perceptions on obstacles experienced in being appointed to their current positions, also added to the information acquired through the questionnaire. Three responses to open-ended question 11 were received. These pertained mainly to the lack of a succession plan and the fact that no permanent middle manager positions had become available. The other input received serves as a general feeling of optimism towards mentorship before the appointment, a development strategy which already appeared in the list of statements pertaining to development strategies. During interviews the importance of career development strategies was explained by the manager, in particular '*professional networking, secondment and the importance of mentorship*' was pointed out by the deputy director.

A comparison of development strategies prior to the appointment experienced by ODL Library middle managers with those examined in the study of Golden (2006:211), pointed out that qualifications, experience and opportunities were amongst the top three career strategies that influenced the appointment. These also

influenced the career path of ODL Library middle managers, since the practicing of secondary roles can be considered to be an opportunity. It can thus be deduced that qualifications, experience and taking opportunities (such as participation in secondary leadership roles) are significant facilitators of success in the career path of managers regardless of library type since both the managers of public libraries and ODL Library middle managers identified these.

Summary deduction of this subsection suggests that middle managers worked and planned for career progression, although support received from their family influenced the successful appointment as middle manager; and they followed strategies and used various approaches such as performing secondary management roles; attending management short courses; pursuing a desire for career advancement; professional organisation networking; and developed through qualifications and experience that they perceived to promote their careers. Aspects in this subsection were measured to gain information in terms of the empirical Research questions 4.2 and 4.3. They also relate to Objectives 2 and 3 in terms of factors and strategies that influence the appointment of ODL Library middle managers.

5.2.3 Development factors and strategies as facilitators of an optimal career path

This section focuses on what optimised the career path of the ODL Library middle managers after appointment. It included finding out the development needs of ODL Library middle managers, what factors over which they had some control contributed to the success of participants and what development career strategies contributed to career success after their appointment. Questions 13-16 were posed to get answers which explained the importance of factors and strategies that facilitate an optimal career path of an ODL Library middle manager.

Research questions 4.2 and 4.3 are further addressed by means of two sub-questions listed below - with the associated questionnaire questions indicated - that are assumed to answer to these sub-research questions.

These include,

(i) How do middle managers perceive the importance of the role to be performed in terms of certain statements (question 13) and internal factors on career success (question 16)?;

(ii) Perceptions on the importance of identified career development strategies on career success: importance and use of development strategies (questions 14 and 15);

(i) The importance of the role to be performed in terms of certain statements (question 13) and internal factors (question 16) on career success

To find out how ODL Library middle managers perceived the importance of internal development factors and needs (to be addressed through development strategies) in facilitating an optimal career path of ODL Library middle managers, Question 13 and Question 16 were posed.

Question 16 assesses how important middle managers perceive six previously identified internal factors to be in performing in their current middle management positions (thus in enhancing continued career progression). In section 2.8.3 of Chapter Two it was explained how these factors were selected based on the studies of Farmer and Campbell (1998), Golden (2006) and Stavrou (2011). According to the definition by Golden (2006), these are factors innate or developed. Table 22 reports the response patterns for each of the six factors. The last row of Table 22, the row of totals, indicates that respondents overwhelmingly perceived these internal factors to be important to their continued performance in their current middle management positions. This statement is based on the fact that of the total responses reflected in the totals row, 98.8% were critically/ or important responses. The statistical significance associated with the Chi-square statistic (excluding the near-zero *neutral* and *not important* rating frequencies) of 1% confirms that statistically significantly stronger opinions were expressed regarding the importance of the factors of ability (80.56% critically important responses), communication (75% critically important responses), hard work (75% critically important responses) and determination (72.22% critically important responses). The mean rating of all these responses (calculated for all groups of age, language and job-changes categories) reflected in

Table 18a approximates, in nearly all cases, a rating of '1' which signifies 'critically important' and which confirms the findings for Table 22. Figure 11 depicts the importance of internal factors.

Qualitative data analysed to interpret the quantitative results further, was collected through the closed-ended questionnaire items that probed other internal factors to provide an opportunity to give more information in open-ended questions marked 'other', but none were noted. However, in the open-ended question relating to other factors which were important to being appointed in the present middle manager position, two respondents affirmed the importance of 'hard work', which presents a feeling of optimism toward this internal factor.

During interviews all participants on the different management levels expressed their views on the importance of six previously identified internal factors (Question 2 of the interview protocol) which corroborated the quantitative findings. This also explained the quantitative findings as reasons were given as to 'why' internal factors are important and 'how' they could be enhanced. The manager explained that '*there is no replacement for hard work*'; and that 'ability' also has an impact on career success, '*particularly if it is coupled with willingness*'. The deputy director also pointed out that 'hard work' was preferred and, as a 'goal getter', coupled it with 'determination'. The director coupled 'hard work' with '*attitude as it can make or break you – attitude towards seniors, taking responsibility for contributions made, and willingness to walk the extra mile*'.

An examination of institutional documents further explained the reason why 'ability' was rated significantly high. These documents make mention of 'ability' in terms of annual score obtained during the end-of-year performance assessment which forms part of the institutional performance management system. The institution's Talent Management policy recognises this factor as an essential quality that capacitates an individual to perform an activity (University of South Africa. Department of Human Sciences 2014c:3). This factor may therefore facilitate career advancement. Other factors that can be linked to the institution's approach to ensure success are hard work, enjoyment and flexibility in terms of the high premium placed by the institution on continuous improvement and high performance teams (University of South Africa 2014b:1-15;32).

The results in this study also relate to the results reflected in the study conducted by Golden (2006) on the importance of internal factors. The study of Golden (2006) revealed that the top four factors were rated in the following order: hard work, ability, determination and flexibility. The results of this study also revealed that three of these factors were in the top four rating, namely ability (80.56), determination (72.22%) and hard work (75%). Of these, 'communication' in this study was rated second highest (75%), but was not included in the study of Golden (2006).

Likewise, Table 18 (question 13) reports the importance ratings of participants on an additional set of previously identified internal factors for their impact on future career progression. Question 13 requested participants to rate eight aspects (understood to be internal factors relating to the environment in which the middle managers operate) for their perceived importance in performing in their middle management positions. These aspects were raised since these middle managers have to understand different environments in which they operate as discussed in Chapter Two.

A strong focus was placed on these matters during the literature study since middle managers need to understand the environments that impact on their business. It was indicated in Chapter Two by Raubenheimer (2004:20) that the ODL Library is managed as a business. The demands on the managers role was pointed out by various experts such as Beckhard (1969:v), Orenstein (2002:83), Mbambo-Thata (2010:469), Hellriegel et al. (2012:13). It indicated in sections 2.4.1 and 2.5.1-2.5.5 that the middle manager's role in the library service environment as a niche market required extensive planning and library services in an ODL environment which need to be understood. In sections 2.6 and 2.6.1 Talesra (2004:34) alluded to the value of the ODL environment and Henning (2010:441) explained the characteristics of the ODL Library environment which distinguish it from the residential academic library environment. The study's strong focus on the management environment pointed out the functions and typical management activities alluded to by Nienaber (2010:665) in section 2.2.1 and 2.2.1.1. A strong focus was placed on the role of organisation theory that influences the role of managers in terms of a variety of aspects, for example, its scope (section 2.5.1-2.5.5) and that management in contemporary management acknowledges the relationship between management and KM (sections 2.3.1 and 2.7).

Table 18 presents the rating frequencies of the environmental factors. The row of totals, the last row of Table 18, indicates that respondents, as in the case of question 16 (Table 22), overwhelmingly perceived these factors to be important to their continued performance in their current middle management positions. This statement is based on the fact that of the total responses reflected in the totals row, 92.68% were critically/ or important responses. The statistical significance associated with the Chi-square statistic (excluding the near-zero neutral and not important rating frequencies) of 5% confirms that statistically significantly stronger opinions were expressed regarding the importance of the factors of understanding the library service environment (72.22% critically important responses), understanding management/ supervisory activities of the library (72.22% critically important responses) and understanding the ODL Library strategic plan (61.11% critically important responses). This is depicted in Figure 9. The importance of an understanding of the environments was expressed during interviews by the respective managers and it was explained how an understanding can be improved through networking and participation in strategic planning (Questions 3 and 4 of the interview protocol).

(ii) Perceptions on the importance of identified career development strategies on career success

In sections 2.8.1 and 2.8.2 of Chapter Two, important career development strategies were discussed. To find out which career development strategies facilitate an optimal career path in accordance with the perceptions of ODL Library middle managers, questions about the importance of these strategies and use thereof were posed. These were questions 14 and 15 of the questionnaire and questions 2b in the interview protocol which relate to Research questions 4.3.2 and 4.3.3.

In Question 14 of the questionnaire of this study, the closed-ended questions probed the perceived importance of 20 previously identified development strategies towards continued success/ or career progression, while in Question 15, the closed-ended questions probed perceptions regarding the personal application value of these same development strategies. The frequency response patterns to each of the 20 strategies are reported in Tables 19 and 20 respectively.

Deduction

Of the total responses of 702 reported for the strategies in Table 19, 563, or 80.08%, responded with either *critically important* or *important* responses. The overwhelming perception of participants therefore indicated the importance of development strategies (57.75% 'important' rating).

Excluding the *irrelevant* frequencies, statistical differences between rating response patterns for the 20 strategies were established on the 0.1% level of significance. The highest percentage of *critically-* and *important* perceptions were attached to the strategies of

- Management (100%); leadership (97.63%); special projects (94.12%); IT training (91.66%) and career planning (91.18%); followed by
- Coaching (86.11%); professional networking (85.00%); ODL networking (83.33%); 360 degrees assessment (81.82%), and action planning and ODL Library experience (80% respectively).
- In relation, the remaining strategies were perceived as significantly less important, for example RPL; counseling and KM training.

The low rating of KM training is a matter of concern since the Principle-led viewpoint in the related management theory attaches much value to the acknowledgement of KM (Hellriegel et al. 2012:125-128), as indicated in section 2.7.

Comments on use of strategies after appointment as an ODL Library middle manager:

- Findings related to Table 17 on career planning towards being appointed in a middle management position confirm the importance attached to 'career planning' in this table, Table 19.
- Also with regard to qualifications, in Table 15, a total of 40.99% of the participants indicated that they hold a postgraduate qualification on the honours, masters or doctoral level. In Table 19 it is indicated that more ODL Library middle managers rated formal postgraduate qualifications as critically important compared to undergraduate library qualifications (30.11%).

Similarly to the importance of career planning both before and after the appointment, the results on the importance of qualifications before and after the appointment are not only affirmed by quantitative results but also during the findings in interviews with ODL Library middle managers when the need for qualifications was discussed. It was accentuated by both senior managers (deputy director and director) that postgraduate (“advanced”) qualifications are required to optimise the career path.

Respondents were probed in an open-ended question in the questionnaire to provide other important development strategies to continue performing in the current middle management position. Of the three recorded responses, areas for future development that relate to the quantitative findings above (Management (100%); leadership (97.63%)) are the development of ODL Library middle managers as leaders (such as the values of servant leadership); and to identify Employment Equity appointees with a view to develop them to perform the role of an ODL Library middle manager. These development aspects reflect a similarity to the finding on ODL Library management development indicated above (Management (100%); leadership (97.63%)).

There is a resemblance between identified strategies in this study that lead to career success and strategies examined by Golden (2006) that facilitated career success. These were post graduate library qualifications, specifically a Master’s degree (94.9%); career planning, continuing education, mentoring, networking, professional involvement, experience and recognising opportunities.

An analysis of institutional documents indicates that a high premium is placed on both leader and leadership development. PDP’s of middle managers submitted to the institution as part of the person’s annual performance agreement revealed that personal development plans contain not only details on required training to operate within the library service environment, but also the leadership development strategies. This explains the perceived importance of career development strategies expressed by staff in the response to relevant questions in the questionnaire and during interviews.

However, institutional documents further revealed the institution’s strategic view on staff development through a Talent Management plan to attract new staff and retain

existing staff (University of South Africa 2014b:43). The document explains that as South Africa's single dedicated ODL institution, the institution requires a competent and motivated workforce to deliver its extensive educational and social mandate as set out in its strategic plan. Its unique ODL model subsequently requires specialised educational capacity and capabilities. The institution endeavours to attract and retain staff with such capabilities.

In terms of 'who' is responsible for the implementation of the Talent Management policy, it is stated that the process will be championed by senior management, but facilitated by line managers. Employees should receive development opportunities based on merit, potential and performance needs measured against criteria for development and advancement (University of South Africa. Department of Human Resources. 2014c:3). In order to realise this, line managers will collaborate with the institution's Department of Human Resources on implementing the integrated talent management strategy in their respective departments (University of South Africa 2014c:5). A response to the question 'who' will participate in such an initiative, the document reveals that the talent management process is applicable to all employees who are employed permanently at the institution or on a fixed-term contract of not less than twelve months. The relevant Talent Management Policy is intended to 'ensure business continuity, the enhancement of the institution's operations through capable employees who remain at the leading edge of their profession'. This will ensure that students and stakeholders benefit from high-quality service rendered by competent professionals, encourage employee engagement and subsequent improvement of morale, and also provide developmental opportunities to all employees. Through a talent management programme the institution can attract, develop and retain employees with the appropriate knowledge, skills and mind-sets to contribute to the institution's success and sustainability.

During interviews, in accordance with interview protocol question 2b various career development strategies which facilitated an optimal career path for ODL Library management were accentuated and explained by respondents representing the respective managerial levels. The focus of the discussion was, however, mostly on how management development and more specifically the leadership aspect thereof can be realised. This was accentuated by the first-line managers, namely the

supervisor and manager, who both suggested 'secondment as a significant strategy to optimise the career path'. The manager also more specifically pointed out 'a leadership programme, such as *Building tomorrow's leaders*', during which this person was exposed to the people aspect in leadership. The person, however, not only accentuated the leadership aspect but coupled it to the role and activities to be performed by a manager. Activities relate in particular to the activities identified by Nienaber (2010:665-667) which are discussed in Chapter Two (section 2.2.1.1).

Another strategy mentioned by both the supervisor and manager as '*an important facilitator of the career path was LIS networking*'. The supervisor added that '*LIS networking must be coupled with networking with own peers in the ODL Library*.' The manager explained the value of ODL networking as '*a strategy which enables a manager to benchmark the own library's service against that of another ODL Library and to learn what kind of expertise is needed to develop a well-vested ODL institution and how ODL Library middle managers should be trained*'.

During interviews, also the perceived perception of what it means to be developed as a manager in the current position was expressed by respondents. Although this question was posed as an ice-breaker question in the beginning, these responses relate closely to developmental strategies. The supervisor indicated that 'in any job, and it also applied to middle management, *development means career development*'. It was further explained that '*ODL courses from a service point of view would benefit supervisors since service delivery is mostly done in an environment where the client is represented by a piece of paper*'. The manager also expressed a strong focus on ODL service delivery and explained ODL librarianship '*means you are conversant of the fact that service has to be rendered in different packages and for different people in their geographically disbursed environments*'. The deputy director placed much weight on the fact that development means '*it is to develop skills*'; the director pointed out that should the director develop staff the focus should be on motivating subordinates so that they want to perform the role of managers on a more senior level in the hierarchy and aspire to be placed in a higher level management position.

Question 15 in the questionnaire considered the application of development strategies measured against the impact of personal usefulness.

Deduction

The totals row of Table 20 indicates that 64.74% of the total responses reported represented *most successful/successful* responses (in comparison to the corresponding 80.08% figure of Table 19). Although the 64.74% figure indicates successful or frequency-of-use of these strategies by middle managers personally, the comparison between the two corresponding figures suggests that the impact of personal usefulness/ application of development strategies is perceived as somewhat less relevant on a personal level than the impact of development strategies on middle managers in general (personal and general impact perceptions seem to differ).

Table 20 furthermore indicates statistical significance on the 1% level with respect to response patterns of the different development strategies. Comparing with the importance rating of Table 19, perceived personal success/usefulness agrees in many respects with perceived general importance evaluated in Table 19 (although the magnitude of frequency-of-use/ successful use is less than that indicated for perceived importance of Table 19 as the following listing explains):

For perceptions of usefulness or application the percentage of *most successful /very successful/ (interpreted as use very often or often)* ratings in Table 20 indicate lower ratings (the corresponding figure for perceived importance is given in brackets):

- The following were again rated highly, namely Management: 91.42% (corresponding Table 19 figure: 100%); leadership 86.11% (97.63%); special projects 80.56% (94.12%); and IT training 82.86% (91.66%), while career planning received less attention with 63.64% (91.18%); followed by
- coaching 73.52% (86.11%); professional networking 74.90% (85.00%); action planning 73.52% (80.00%); ODL Library experience 75.00% (80% respectively); while 360 degrees assessment 45.45% (81.82%) and ODL networking at 55.88% (83.33%) received less attention;
- In relation, the remaining strategies were perceived as significantly less important, for example, RPL 45.17% (57.14%); counseling 54.28% (60.00%) and KM training 50.00% (69.44%).

The importance versus the application of strategies is depicted in Figure 10.

It was not clear to the researcher why the application of development strategies was rated lower than the use thereof. Respondents representing the respective managerial levels explained why the use of career development strategies is lower than the importance thereof. The first-line managers (supervisor and manager) explained the situation. The supervisor explained that it is difficult *'to bring theory and practice together, to interpret what you've learnt and to apply it in such a way that it works in your institution'*; the manager explained that *'it is a matter of no opportunity to apply what was learned through the development strategy since there is sometimes not 'the necessary or the adequate support'*. The deputy director also ascribed the low use to a lack of practising it, but explained that *'there's no time here to apply that'*. The deputy director further alluded to the fact that there must be a way to actually use new knowledge – *'if it is not practiced training it is just a waste of money...resources'*.

In summary, the results thus suggest that application of development strategies corresponds with perceived importance, but practical application of development is slightly below perceived importance of developing these skills/abilities. The mean response ratings for the combined 20 strategy ratings for the two questions presented in Table 20a mirrors this deduction: the mean rating for use of strategies (q14) is slightly less than that of perceived importance of development strategies (q15) for all categories of language, age and number of job changes.

Comparison between the two figures suggests that the impact of usefulness/application of development strategies are perceived as somewhat less relevant on a personal level. The reasons for this result were explained in the findings of the interviews, mainly that ODL Library middle managers should be encouraged to practice what was learned during training initiatives.

The need for the application of new knowledge is further explained in accordance with the institution's newly created Talent Management plan. As part of the institution's definition of talent management, it is accentuated that employees must be able to achieve the institution's strategic objectives and to create a high-performing, vibrant and sustainable organisation' (University of South Africa. Department of Human Resources 2014b:7). This means that the development of employees is done with a view to enhancing a sustainable, high-performance

organisation. Employees will therefore be responsible for, inter alia, supporting and engaging in performance improvement. They will therefore have to gain insight into the job profile and level of competencies, take responsibility for own career growth and engaging the line manager to realise the developmental areas, career aspirations and motivation levels, improve the range of learning opportunities, have clarity about what is required to move from one career stage to the next, compete when career advancement opportunities arise and participate in self-directed career development (University of South Africa. Department of Human Resources 2014c:6). In accordance with the document, talent management will thus ultimately contribute to the employee's satisfaction and subsequently feed job retention, which contributes to the organisation's competitive advantage (University of South Africa 2014b:9).

An answer to the question how this development should be further addressed or internalised, relates to discussion in this regard described in Chapter Two (Section 2.2.2). Sturges (1999:240) alludes to the fact that 'there has been an eagerness to endorse career self-management'; Golden (2006:177) supports the views of Bernthal, Rioux and Wellins (2004:2) namely, that managers will have to apply methods of professional advancement through self-development in future in order to increase their own marketability; Cronje et al. (2007: 207) allude to the fact that the term 'development' relates to 'human resource development' which refers to a set of systematic and planned activities designed by an organisation to provide an opportunity to learn new skills to meet current and future job demands in support of a successful career path. Skills development has been accentuated for many years by authors on the topic of how to develop people (Stoddart 1987:271).

In this section individual external development factors and strategies that influence the appointment of ODL Library middle managers are analysed; and the part on internal development factors and career strategies that optimise the career path is analysed in response to Objectives 2 and 3 respectively.

5.2.4 Managerial competencies

This section focuses further on development strategies that optimised the career path of the ODL Library middle managers after appointment with regard to competencies. The questions in this section relate to Research questions 4.4 and

4.4.1 respectively. A study of the literature pointed at the importance and use of selective management competencies as discussed in Chapter Two, section 2.3.3. Table 3 depicts the integration of six acknowledged management theories with the six competencies and demonstrates the importance attached to the competencies by the respective management theories. It indicates the value placed on these competencies by the recently developed flexible and principle-led management approaches in management theories. According to these approaches, all six of the competencies are considered important; and four of the competencies as extremely important, namely communication; strategic action; emotional intelligence and self-management; and teamwork. Hellriegel et al. (2012:130) allude to the importance of the competencies as they lead to managerial success. It was also further noted in the literature that researchers select these essential competencies as part of their research studies on management effectiveness, for example, the study of Steyn and Steyn (2006:322-340) revealed that the six identified competencies can improve the performance of newsroom managers. These are the reasons why these competencies were selected for investigation in this study.

The importance of these competencies to the role of ODL Library middle managers is reflected in the quantitative results in response to Question 17 (communication competencies); Question 18 (planning and administration competencies); Question 19 (teamwork competencies); Question 20 (strategic action competencies); Question 21 (globalisation competencies); Question 22 (emotional intelligence and self-management competencies); and Question 24 (success attained through the competencies); and the qualitative findings of data collected through interviews and an examination of institutional documents.

To find out which competency facilitate an optimal career path in accordance with the perception of ODL Library middle managers, questions about the importance of identified competencies mentioned above and use thereof were posed in a survey questionnaire, as well as Question 5 in the interview protocol.

The frequency response patterns of participants' perceptions of the importance of these competencies for career advancement are reported. Table 29 provides a summative success rating of all competencies. In this section, only the main deduction that can be derived for each competency is briefly discussed. The

questionnaire revealed answers to questions on the importance of the respective dimensions within each competency. Questions raised were formulated in terms of important aspects relating to the ODL environment within the respective dimensions of each competency, and the one-on-one interviews revealed 'why' the development strategies relating to competencies are important and 'how' they can be implemented. It was borne in mind that in accordance with the institution's documents, competency development must, however, also be considered in terms of the business context where the competencies need to be applied, meaning that competency development must be considered in terms of the institution's values and value proposition, such as ICT enhanced learner support which caters for diverse student needs in a global environment (University of South Africa 2014b:9). This was subsequently reflected in the questions posed.

5.2.4.1 Communication competencies

Based on the literature discussion in section 2.3.3.1 regarding the communication competencies as a very important component of leadership, questions relevant to the ODL environment that could capture the essence of the respective dimensions were formulated. In response to Question 17, Table 23 reports on the competency of communication. It is highly regarded as a success promoter. This is obvious from the fact that a total of 59% *critically important and important* responses were recorded. The response patterns for some communication elements were, however, regarded as significantly less important than other elements on the 0.1% level of significance (for example ability to develop social networks, and communication practices such as twitter). This can be ascribed to the fact that: In accordance with institutional job descriptions, KM related skills required to reply to queries received through social media are dealt with by non-managerial staff of one directorate where the infrastructure in support of the communication system had been well established for many years.

The quantitative data reflect three important dimensions within the competency which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency and by Hellriegel et al. (2013:32-35) to achieve success. These are informal communication, formal communication and negotiation. Critically important or important ratings were received by ODL Library middle managers for the elements

reflected in the three dimensions of the communication competency, namely informal communication (flexible communication (100%); open and honest feedback on performance (100%); sharing of knowledge (100%)); formal communication (delivering of high level presentation (94.44%); developing social networks (62.11%) and communities of practice such as Facebook (62.85%)); and negotiation (ability to comfortably exercise managerial power (97.23%)). The latter pertains to the fact that middle managers have to perform a complex role as indicated in Chapter One, section 1.1.1. Strong management expertise is required during negotiations when middle managers often have to wear three hats as alluded to by Uytterhoeven (1989:1) when communicating upwards with seniors, sideways with peers and downwards with subordinates.

In section 2.3.3.1 it is indicated that Hellriegel et al. (2013:32) allude to the fact that this competency is applicable to all management levels. This was confirmed by the qualitative findings in this study when the importance of the competency was discussed. The reason why the communication competency is considered important by ODL Library middle managers was explained during interviews by all the respondents representing the respective managerial levels (100%). In this regard, the supervisor stated that *'communication is extremely important in a large institution'* and provided an example, namely, that in the directorate where the person operates *'alone there are twelve middle managers with service independencies'*. Both the manager and deputy director considered communication as a *'key competency'* or the *'most important' competency, since without this 'nobody will listen to you'*. The form in which communication takes place in an ODL Library environment was explained by the deputy director, namely *'formal one-on-one meetings, a formal monthly meeting with all staff in branch libraries by means of telephone or video conferences and, in between, communication which takes place via email'*. The director accentuated the importance of communication specifically in an ODL environment where communication is done in both *'written and verbal format'*.

5.2.4.2 Planning and administration competencies

Based on the literature discussion in section 2.3.3.2 regarding the planning and administration competencies which provide direction, promote coordination and

compel managers to look at the future and sustainability, questions relevant to the ODL environment that could capture the essence of the respective dimensions in the competency were formulated. In response to Question 18, Table 24 reports on the competency of planning and administration. Although respondents overwhelmingly indicated the importance of the planning competency for career advancement (96.34% of total responses were either *critically-/ or important* ratings), some administration competency-elements were regarded as significantly more relevant to career success than other elements. These include applying digital software for knowledge repositories. (Statistical significance on the 1% level of significance was indicated if the sparsely populated 'neutral' and 'not relevant' responses were omitted).

The quantitative data reflected three important dimensions within the competency which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency and by Hellriegel et al. (2013:35-36) to achieve success. These are information gathering, analysis and resource allocation. In the case of information gathering, critically important or important ratings were received for the ability to monitor information and guide future decisions (100%); and the use of knowledge repositories (80.56%). With regard to analysis, with the exception of the element pertaining to the ability to take calculated risks (97.22%), critically important or important ratings of 100% were received for both translating the vision and goals to objectives and actions and prioritising resource allocation and the ability to multitask; problem solving and budgeting (critically important or important ratings of 100% were also received for the ability to use information-based financial reports).

The reason why planning and administration is considered as an important competency by ODL Library middle managers was explained during interviews by two respondents (50%) who represented the relevant managerial levels. In this regard, the supervisor indicated that '*there's a lot of day-to-day planning, also monthly and annual planning*'; and the director accentuated the importance of this competency in the ODL environment. It was explained that '*it takes much time to plan in an environment where library clients reside in different environments*' and '*that pro-active planning is required*'.

5.2.4.3 Teamwork competencies

Based on the literature discussion in section 2.3.3.3 regarding the teamwork competencies which accomplish tasks through small groups of people who are collectively responsible for the ODL Library's service to clients, questions relevant to the ODL environment that could capture the essence of the respective dimensions in the competency were formulated. In response to Question 19, Table 25 reports on the competency of teamwork. Participants' perceptions of the impact of teamwork competencies on career success indicated the competency as very relevant (277 of 277, thus 96.18% critically-/ or important responses were recorded). Some elements were regarded as significantly more relevant than others. (Statistical significance on the 1% level was indicated for differences in frequency response patterns for the various elements). For example, the second competency element, namely "the ability to effectively compile efficient task teams which include a perspective-diverse group", was rated significantly lower than the other team ability elements, although still important. This can be ascribed to the fact that ODL Library middle managers do not consider this as a specific skill to be acquired since it is normal practice in the ODL institution that appointments are done in accordance with the team profile while taking into consideration the need for diversity and meeting employment equity targets.

The quantitative data reflect three important dimensions in the competency which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency and by Hellriegel et al. (2013:36-38) to achieve success. Critically important or important ratings were received by ODL Library middle managers for the elements reflected in the three dimensions of the teamwork competency, namely design teams (ability to compile teams and the required skills and abilities (100%); compile teams from the perspective of diversity (86.11%); setting development goals to promote ODL librarianship (91.66%)); creating a supportive team environment (ability to create quality monitoring systems for team rewards (97.22%); support task teams, coach, mentor, quality service delivery (94.45%); convey ideas to evoke desired actions (100%)); manage team dynamics (critically important or important ratings of 100% were received for both the ability to apply staff knowledge for ensuring goal achievement and the ability to implement conflict resolution

effectively).

The reason why teamwork is considered as an important competency by ODL Library middle managers was explained during interviews by three respondents (75%) who represented the relevant managerial levels. It was explained by the supervisor that *'the pre-requisite for effective teamwork is an understanding of the strategic direction of the institution and related goals'*; the manager defined teamwork as *'a journey in which people are together'*; the deputy director alluded to the fact that *'there's no way that you can achieve without teamwork- it is all about sharing ideas'*. The deputy director further advised on how working in ODL Library teams in different geographic areas (geographic mobility) could benefit ODL Library middle managers' understanding of diversity by stating that it *'broadens perspective. You get to know different cultures, different people, which enables a person to work with different people'*.

5.2.4.4 Strategic action competencies

Based on the literature discussion in section 2.3.3.4 regarding the strategic action competencies which relate to an understanding of the overall mission and values of the institution, questions relevant to the ODL environment that could capture the essence of the respective dimensions were formulated. In response to Question 20, Table 26 reports on the competency of strategic action. Participants' perceptions of the impact of the ability to think strategically on career success indicate that this competency is highly valued (96.99% critically-/ or important responses were recorded). The participants perceived all elements of strategic thinking to be approximately equally important. Statistical significance was not indicated in this instance which implies that frequency response patterns for the various competency elements do not differ significantly from one another.

The quantitative data reflect three important dimensions within the strategic action competencies which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency; and by Hellriegel et al. (2013:38-39) to achieve success. These are the understanding of the industry, understanding the organisation and taking strategic action. Critically important or important ratings were received by ODL Library middle managers for the elements reflected in the three

dimensions of the strategic action competency, namely for understanding the LIS environment (ability to exhibit ODL leadership based on LIS insight (94.45%); analyse the implications of current LIS trends (100%)); understanding the organisation (ability to keep abreast of management responsibilities required by the ODL institution and the managing of ODL partnerships (94.44%); fit into the corporate culture of the ODL institution (91.66%); understanding the structures of the ODL organisation (97.23%); understanding the competencies of the ODL organisation (97.23%)); taking strategic action (critically important or important ratings of 100% were received for the ability to prioritise operational goals and promoting the implementation of strategy); the use of organisational assets to inform critical issues (97.22%); encouraging of innovative ideas (100%); marketing of information products and services of the ODL Library (94.45%).

Following the quantitative results pertaining to the strategic action competencies, the matter needed to be discussed further in terms of the role of middle managers in strategic management discussed in section 2.2.3.1 of Chapter Two; the importance of the ODL Library's strategic plan discussed in section 2.4 of Chapter Two as well as critical important responses indicated with regard to the ODL Library strategic plan in Table 18. Section 2.2.3.1 explained how the role can be enhanced through a learning organisation and how it could contribute towards shared decision making. Cronje et al. (2007:356; 359) allude to the fact that shared leadership contributes to the learning experience because in accordance with the Shared leadership theory, decision-making and leadership are shared. This means that leaders facilitate the creation of a shared vision and then keep organisational members working towards the vision and encourage a collaborative environment critical to learning. The importance of leader influence on the middle manager level and its contribution to shared leadership was later also accentuated by Cawthorne (2010:151). This can be used in support of the ODL Library strategic plan discussed in section 2.4. The focal points in the plan point at a need for middle manager involvement.

In accordance with the Interview protocol, Question 3, the reason why strategic action is considered as an important competency by ODL Library middle managers and their envisaged role in this regard was explained during interviews by all respondents (100%) who represented the relevant managerial levels. In this regard,

the director was the only middle manager who was content with the way strategic action is executed in the ODL Library as the person alluded to the *'importance of this strategy, particularly with regard to understanding the external environment'*. Other middle managers expressed strong views on their involvement as the first-line manager who operates as a supervisor explained that *'even though we work more on the operational level, operations and strategy must talk to each other'*. The supervisor further explained that as *'implementers of strategic projects, supervisors are much involved in giving input to what is needed, planning and meeting the deadlines'*. The manager explained that *'the involvement of ODL Library middle managers in strategic planning is important since 'strategy is driven by resources,' meaning that managers should be informed so that the person can respond to and communicate the strategy, manage the change, develop the required pool of skills and ensuring 'buy in of people' to ensure that the service can be implemented'*.

The manager further explained that *'managers need to ensure that the relevant processes and required expertise are established and that the change is communicated'*. The manager further pointed out that *'there is scope for improvement'*, why the way strategic planning is done should be changed and how it should be done: It was pointed out that *'managers would prefer to be more involved in strategic planning'*. The *'gap between managers and senior management in the ODL Library hierarchy should be decreased'* in order for managers to understand *'where top management is coming from, to feel respected as a manager who people report to - by default I'm senior to those people'*. This view was supported by the view of the deputy director who confirmed that *'managers, deputy directors and directors should perform strategic planning together from the first alignment of the ODL Library's plans with those of the ODL institution'*.

5.2.4.5 Globalisation competencies

Based on the literature discussion in section 2.3.3.5 regarding globalisation competencies which involve interdependencies among countries as reflected by increasing border services including library services, questions relevant to the ODL environment that could capture the essence of the respective dimensions were formulated. In response to Question 21, Table 27 reports on the competency of globalisation. The fact that the majority of total response ratings recorded were

'important' ratings indicate that participants still perceived the ability to fit into the global environment as important to career advancement, but to a somewhat lesser extent than the 'hard core' managerial competencies of teamwork, strategic thinking, planning and administration, emotional intelligence and self-management and communication. This statement is reflected in the mean rating scores for the various competencies presented in Table 24a.

The quantitative data reflect two important dimensions within the globalisation competencies which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency and by Hellriegel et al. (2013:39-42) to achieve success. These are cultural knowledge; and cultural openness and sensitivity. Critically important or important ratings were received from ODL Library middle managers for the elements reflected in the two dimensions of the globalisation competency, namely cultural knowledge (ability to recognise impact of global events on the ODL organisation (94,45%); the ability to travel to countries where the ODL Library has an interest (94.44%); and to obtain a basic business vocabulary for use where the ODL Library has interests outside South Africa (100%)); cultural openness and sensitivity (ability to avoid stereotyping and recognise culture-variation (97.23%); and the ability to gain insight into cultural background and attitudes (97,23%)).

The reason why globalisation as a competence is considered as less important by ODL Library middle managers was explained from a geographical point of view during interviews by three respondents (75%) who represented the relevant managerial levels. The supervisor explained that the lower rating of this competency can be ascribed to the fact that *'when working in an ODL Library the geographical location of a client is not viewed as an issue since all our clients must be the same; it doesn't matter where they are'*. This view was confirmed by the deputy director who stated that *'there is no difference between the ODL Library's branch libraries, whether in South Africa or in another country. Distance does not make a library global'*. It was further explained that it is all about ODL librarianship which may require additional skills, such as people skills. Cultural sensitivity is required because *'for you its normal, that's how I say it, but that person has his/her own interpretation'*. The deputy director further explained that *'the only difference between local and other libraries lies within the approach of people towards service delivery. This can*

be addressed through a service charter'. The director alluded to the fact that globalisation relates to an understanding of the clients that cannot be met in a face-to-face situation. The situation requires a '*sensitive, emotionally intelligent person*' in order to '*read a situation and/or a behaviour without actually meeting the person and to analyse it from paper and be able to take an informed decision*'.

As indicated in section 2.4, the ODL Library's principal business is to provide access to global information through services appropriate to ODL. The Library's operations are primarily on the continent of Africa. Its strategic plan sets out what needs to be achieved which include matters which require support of ODL learners; excellent ODL capacity in libraries, professional leadership, and improved morale and staff welfare. These matters all require an understanding of globalisation from the internationalization of library services point of view which should include understanding and cultural knowledge and sensitivity which will enable ODL Library middle managers, for example to avoid stereotyping, recognise culture-variation and provide insight to cultural background and attitudes, be sensitive to cultural cues and adapt in novel situations. Quantitative results, however, indicated that these matters were rated low in terms of critically importance.

5.2.4.6 Emotional intelligence and self-management competencies

Based on the literature discussion in section 2.3.3.6 regarding emotional intelligence competency (which involves the ability to perceive, assimilate, understand and manage emotion) and self-management competency (which implies taking responsibility for your life at work and beyond), questions relevant to the ODL environment that could capture the essence of the respective dimensions were formulated. In response to Question 22, in Table 28 participants perceive the impact of emotional intelligence on career success as very important. This competency was rated as very important at 96.21% critically- or/ important ratings recorded.

The quantitative data reflect four important dimensions within the emotional intelligence and self-management competencies which were also identified by Steyn (2006:397) as important to achieve effectiveness and efficiency, and by Hellriegel et al. (2013:42) to achieve success. These are self-awareness, self - management, social awareness and relationship management. Critically important or important

ratings were received by ODL Library middle managers for the elements reflected in the four dimensions of the emotional intelligence and self-management competencies, namely self-awareness (ability to foster a sense of self-worth and capabilities (91.66%); ability to see opportunities and own growth towards personal goals (94.44%); ability to maintain good personal standards for integrity and ethical conduct (100%); ability to set standards of honesty (100%)); self-management (ability to meet personal objectives regarding personal growth (94.44%); ability to obtain a balance in work-/ private-life (100%); ability to persevere even when obstacles are present (100%); social-awareness (ability to take a personal interest in concerns of others (80.56%); ability to establish a learning environment via knowledge sharing (100%); and relationship management (critically important or important ratings were received for the ability to remain confident when resolving disagreement (100%); ability to apply different leader-styles (situation-dependent) (97.22%).

As explained in section 2.3.3.6 by Ouy Nguyen (2001:78), the benefits of self-management development as a competency enable people to apply self-motivation, make wise choices in terms of career development and provide know how to balance their work life and private life. The reasons why emotional intelligence and self-management were considered important by ODL Library middle managers was explained during interviews by all respondents (100%) who represented the relevant managerial levels. The supervisor explained the importance of the competency since *'emotionally you've got to know yourself. In a diverse environment most of us in our teams are conversing with each other in a second or a third language, so we need to take into consideration that the way you say something is not always the way you meant it to come out'*. The director accentuated the importance of this competency and explained that *'we have to understand people that are not here and we work with people that are working with clients that are not in front of them. You have to be sensitive enough and be emotionally intelligent to be able to read a situation and/or a behaviour without actually meeting the person and/or the situation, analyse it from the paper and be able to take an informed decision'*.

Regarding self-management, the supervisor explained that it means that *'you're responsible for your own career in a way'*. It was further explained that this

development relates to a very interesting development in the ODL institution, namely *'the talent management programme which actually gives you an opportunity to develop your career (as it) identifies areas in which you can work on. Blind-spots are identified and...it helps in identifying where I can better the aspects of my career that may be needs attention'*. The manager explained that self-development means that a person *'develop yourself to be a professional, and when you are a professional librarian, how are you different from other managers in other academic libraries?'* The deputy director explained the value of self-management as it contributed to the appointment: *'I'll identify my weak point and then I'll work on that'*. This means that self-development is done in accordance with the person's aspiration to facilitate a successful career path.

5.2.4.7 Perceived importance of competencies compared to use

The quantitative findings suggest that if the total frequencies of *critically important* ratings are considered for the different competencies, emotional intelligence (60.35%); planning (61.51%); and communication (58.96%) carry a majority vote for *critically important*. This is followed closely by *critically important* total percentages of 53.38% for teamwork; 45.56% for strategic thinking and 42.59% for globalisation initiatives.

During the interviews, ODL Library middle managers explained the lower rating for use of the competencies if compared with the importance thereof:

'Similar to the lower rating of use of career strategies if compared to the perceived importance thereof, newly developed competencies are often not practiced due to lack of opportunity or support to internalise the gained knowledge'.

Lastly, as indicated in section 5.1.4, it was investigated whether perceptions of the relevance/importance of competencies to career advancement and personal perceptions of attained career success are related. Variables were identified that could serve as measures of participants' perceptions of 'how successful they are', versus measures of the 'importance perceptions' of competencies. Question 24 of the questionnaire gives an indication of how successful the participants consider themselves in their current ODL middle manager post. An average can be further calculated for the six sub-questions in Question 24 to give a measure of success

experience in the current post.

This part concludes section 5.2.4 on the importance and use of managerial competencies and can be viewed as a response to Objective 4 and the related Research question 1.3. It also ends the interpretation of data which reflects the career paths of ODL Library middle managers.

5.3 SYNTHESIS

The interpretation of findings was done with a constant reference to Chapter Two because the literature which was reviewed in that chapter was intended to be used in support of augmenting arguments in this research study while synthesising the ideas of other researchers and pointing out gaps if applicable. Pertinent to the synthesis of this study was the knowledge gained in the literature with regard to selected development factors and strategies, including the development of competencies that can be applied to ODL Library middle managers.

It was apparent from the interpretation of findings that the participated ODL Library middle managers have an understanding of what development in the ODL Library entails. Development needs are well supported by the institution and ODL Library middle managers participate in career development activities in accordance with an annual career development plan.

From the questionnaire responses and interviews, it was found that

- most respondents in general place a high premium on the success criteria, but that 'the positive impact of a *person's work on the organisation*' is rated statistically significantly higher than the other criteria when response patterns for the criteria are compared
- respondents in general perceive that they do not measure up to set perceived expectations of meeting the success criteria in all respects
- the only external development factor (over which ODL Library middle managers had no control) that influences the successful career path of ODL Library middle managers is *family support*, whereas respondents overwhelmingly perceive internal factors such as *ability, communication, determination* and *hard work* (over which they have some support) to be

important to their continued performance in their current middle management positions

- results suggest that application of development strategies correspond with perceived importance but the application of knowledge gained through development strategies is slightly below perceived importance
- the total frequencies of critically important ratings for the different competencies, indicate that emotional intelligence; planning; and communication carry a majority vote for critically important, followed closely by critically important total percentages for teamwork
- there is a gap between the higher rated competencies and strategic thinking which should be filled through more involvement by all middle managers in the ODL Library's strategic planning from the moment it commences
- globalisation initiatives on their own are rated less important since service delivery in a global environment is not viewed separately from any other service of the ODL Library per se
- support for the practicing of knowledge gained through career strategies and competencies is required.

5.4 CHAPTER SUMMARY

Chapter Five set out to implement the analysis strategy explained in Chapter Three. The first part of the chapter focused on the internal validity of the study. In this regard the measures of perceptions were discussed to show that they can be calculated reliably. This is reflected in the scale reliability testing and the perception means which were classified against biographical properties in means tables. Results indicate that all success-effects tested (and used in further analyses) complied with internal reliability.

This was followed by a calculation of perception measures for success. Perception measures for success were calculated to establish the mean importance ratings for the respective concepts of this study. These are presented in accordance with the responses to questions in the questionnaire that relate to the respective constructs. Analyses revealed a shift towards somewhat lower self-assessment of success measured against perceived expected success; relevance of previous work

experience and the relevance of work-related qualifications as very important to the successful appointment in current positions; a great level of indecision for all groups on the importance of external factors (over which a person has no or little control) as contributors to success; development needs and understanding the environment to perform in the current middle manager position as important internal factors to be considered to perform the role of ODL Library middle manager; the use of development strategies is slightly less than that of perceived importance thereof; and lastly the mean importance rating for selected competencies is perceived that they personally are able and accomplished in managerial competencies with 'most successful and successful' responses but that use of competencies do not measure up against the importance thereof.

Correlations between factors and strategies which were investigated indicate that career success relates to the perceived importance of certain strategies, including competency strategies. Findings indicate a statistically significant correlation between *number of-strategies-followed* and *experienced-success-in-career-advancement*; *number-of-qualifications-perceived-importance* and *respect-aspect-success-experience* meaning more qualifications are associated with greater levels of success-experience; *experience of being successful-at-impacting-work/life balance* and appointment-importance rating of *experience/qualifications-contributing-factor-to-success*; *importance of emotional intelligence and experience and a feeling of success in emotional intelligence matters*; *emotional intelligence in good performance and high feeling of success in globalisation aspects*.

In the second part of Chapter Five the analysed data was interpreted. This was done through pattern matching and explanations, including rival explanations. The elements of development that ended up being highlighted include the ODL Library middle managers' rating of selected success definitions and related performance, factors that facilitate the appointment to the middle manager position and optimise the career path after the appointment, development strategies, including career strategies and competencies, which contributed to the appointment of ODL Library middle managers and/or optimised the career path after the appointment. Chapter Six presents the summary of study findings, conclusions and recommendations.

CHAPTER SIX: SUMMARY, CONCLUSIONS, RECOMMENDATIONS

6.0 INTRODUCTION

Using the data presented and interpreted in the previous two chapters, Chapter Six restates the purpose and research questions of the study. It also provides a summary of the contents, conclusions and recommendations based on the findings of the study. The research project started with an acknowledgement of the fact that ODL Library middle managers must be developed in accordance with a development structure. A review of the literature revealed that this development must be done by taking into consideration certain development factors and strategies which lead to success. However, there was uncertainty whether development factors and strategies previously tested in another library type or business management environment could be used to investigate the value thereof in an ODL Library, and whether this would point out a need for additional development strategies to be applied in the ODL Library as the development needs of these managers may differ from those of middle managers in a residential university library.

The study set out to determine how ODL Library middle managers can be developed by taking into consideration important development factors and strategies, including competencies and career development strategies, rooted in management theory, that lead to management success. The study aimed to investigate how ODL Library middle managers perceive the importance of these factors and strategies that may lead to success and their own performance in being successful if measured against the importance thereof. The conclusion reached is that there is a definite need for development of ODL Library middle managers in a structured manner, taking into consideration the development factors and strategies, including competencies, which facilitate career advancement.

Given the framework provided in Chapter Two, as well as the quantitative and qualitative research findings discussed in Chapters Four and Five, this case study report in Chapter Six provides:

- A synopsis of the study content

- Research conclusions based on the research objectives stipulated in Chapter One, section 1.2.1
- Recommendations based on the research results. These recommendations culminate in a proposed framework for ODL Library middle management development in South Africa.

6.1 SUMMARY OF THE CONTENTS

Chapter One reported on the most important research findings pertaining to the need for ODL Library middle management development. This motivated the initiation of the study and research question. The method of investigation was outlined in broad terms. Main assumptions, sub-problems and limitations relating to the investigation were mentioned and concepts relevant to the proposed research were clarified.

It was apparent from the preliminary literature review reported on in Chapter One that an understanding of the relevant concepts, theory and practice, which underlie middle management development, is important as it fosters an understanding of the needs of ODL Library middle managers. This discussion on the business management environment, together with a theoretically-based discussion of the ODL environment and its influence on the role and responsibilities of Library middle management, was presented in Chapter Two. A detailed review of theories in the literature that impact on middle manager career success and related aspects that have an influence on the development of ODL middle managers formed the focus of Chapter Two. The study's conceptual framework, available in Chapter Two, guided the study's investigation. The chapter addressed the first three sub-problems of the research statement and provides answers relating to knowledge of management theories and practices that ODL middle managers must gain in order to perform their role successfully; the role of the HR function in ODL Library middle management development and selected career development strategies that lead to success; and selected development factors relating to the successful career path of ODL Library middle managers. Answers to the relevant research questions not only provided insight into development factors and strategies that influence success but also informed the research design of the empirical component.

Chapter Three explained the research methodology of the study. This entailed a detailed discussion on the characteristics of the survey participants, namely ODL Library middle managers and the relevant research site where they operate, namely the only ODL Library in South Africa; as well as a discussion of the research design and methodology which pertains to case study research which triangulates data from multiple resources. It further included a detailed explanation of data collection methods and procedures used to collect data, namely a questionnaire (including pre-testing and administering of this survey instrument); interviews (including the interview protocol and adherence to interview and transcription procedures); and an examination of institutional documents. This was followed by an analysis of data collected from the multiple sources. The steps followed to extract the data from the completed questionnaires, transcribed interviews and institutional documents were mentioned, followed by an explanation of the procedures for the statistical testing and analysis of the data.

Chapter Four contains detailed quantitative results pertaining to the questionnaire, as well as qualitative findings flowing from the interviews and institutional documents. The chapter presents a descriptive summary of the career path of Library middle management operating in an ODL Library relative to the value of the importance of perceived success and competencies, career development strategies and factors that influence career success.

The first part of Chapter Five further presents detailed results of a statistical analysis of the validity and reliability of data indicating importance and use of development factors and strategies; as well as a correlation between variables. This allowed the researcher to elaborate on the findings in Chapter Four and use the findings in the second part of Chapter Five where a holistic interpretation of the investigated concepts was presented, based on data collected through multiple sources in terms of a Type 1 single unit of analysis which applies to this research. Detailed interpreted findings were presented in terms of the structural order of the questionnaire so that factors and strategies that relate to facilitators of the middle managers' appointment are presented separately from those that facilitated an optimal career path. The interpretation provided answers to the empirical research questions, which explain the perceptions and attitudes of ODL Library middle managers towards the

importance of selective success definitions; the importance of selective external development factors and development strategies in facilitating the successful appointment of ODL Library middle managers; the importance of selective factors and strategies, including competencies, in facilitating an optimal career path of ODL Library middle managers. The interpretation was followed by a synthesis of the findings of the empirical investigation.

Finally, Chapter Six provides the research summary, conclusions and recommendations.

6.2 SUMMARY OF THE FINDINGS

As indicated in the summary of the contents above, Chapters Four and Five presented the findings obtained in this study. Chapter Four further provided an interpretation of both the presented quantitative and qualitative data in a descriptive summary which reflects the career path of Library middle management operating in an ODL Library relative to the value of important competencies, career development strategies and factors that influence career success. In Chapter Five, the interpretation of data was based on the quantitative and qualitative data presented in Chapters Four and Five. In Chapter Six, major findings flowing from these interpretations are therefore only briefly reported in response to the empirical research questions relating to:

- How do ODL Library middle managers perceive career success?
- How do ODL Library middle managers perceive their own success measures against selected success criteria?
- How do ODL Library middle managers perceive development factors?
- How important are external factors in facilitating the successful appointment of ODL Library middle managers?
- How important are internal factors in facilitating the successful career path of ODL Library middle managers?
- How do ODL Library middle managers perceive development strategies?
- How important are development strategies in facilitating the successful appointment of ODL Library middle managers?

- How important are development strategies in optimising the ODL Library middle management career path?
- How does the own performance of ODL Library middle managers measure up against their perceptions of the importance of development strategies?
- How important are competencies in facilitating the successful career path of ODL Library middle managers?
- How do ODL Library middle managers perceive their own use of identified competencies that lead to career success?

In order to fulfill the purpose of the study, answers to the empirical research questions were required. Answers to the questions, reflected in the following summary, address the value and contribution of the study and will feature in the recommendations:

6.2.1 ODL Library middle managers' perception of success

A summary of the ODL Library middle manager's perception of success is provided as a response to the study's related research question, Research question 4.1. Major findings explain how ODL Library middle managers perceive success in terms of the importance of success definitions and how own success measures against selected success criteria. ODL Library middle managers clearly relate to the selected definitions that express the meaning of success since they perceive them as critically important contributors to career progression. The importance thereof was also confirmed by the mean perception scores in Table 14a which were calculated for the middle manager categories of age-, language- and number of job change levels. The listed perception means all approximate the value of 2 which signifies "important".

The most important success criteria perceived by ODL Library middle managers relate to the 'impact of a person's work on the organisation'; followed by 'work-life balance' and 'respect earned due to competency'. This means that in accordance with the literature study, ODL Library middle managers fall mainly into the categories of 'influencers' who aspire to have a positive effect on the institution; 'experts' who aspire to achieve a high level of competency; and 'self-realisers' who focus on balancing their work life and home life. In a matrix of correlations calculated for this study, it was revealed that there is a correlation between experience in being

successful in home and life balance and a higher experience of being appointed successfully.

ODL Library middle managers as 'influencers' perceive success similar to the way it is perceived by the institution in which they operate. It was mentioned during interviews and institutional documents reflected the high premium that the institution places on excellence for students and other stakeholders and subsequent success. These findings relate to the findings in the literature which indicate a paradigm shift in management towards a demand for efficiency of managers as the focus is on the consumer and effectiveness; and the need for expertise due to the erosion of leadership stability as the baby boomers are leaving the workplace. ODL Library middle managers attach a less important rating to the success perception of 'advancement in the hierarchy'. This also relates to library theory indicating a shift in the approach to career development since an almost automatic growth in the hierarchy has become obsolete. ODL Library middle managers therefore not only perceive themselves as 'climbers' in the hierarchy, meaning that they do not see a position in the management hierarchy as the only success criterion.

The way they perceive their own success can also be explained against the findings in a matrix of correlations calculated for this study. It was revealed that there is a correlation between the identified success definitions and how ODL Library middle managers consider themselves to be successful in terms of an appointment to the position.

However, as a response to the study's related research question, Research question 4.1.1, it is further noted that in accordance with the ODL Library middle managers' perception of their own performance experience towards being successful, in general, their performance experience does not measure up to set, perceived importance of the success criteria.

6.2.2 External factors and development strategies: appointment facilitators

A summary of the ODL Library middle manager's perception of external factors and strategies is provided as a response to the study's related Research questions 4.2 1 and 4.3.1. Major findings explain from the importance data how ODL Library middle

managers perceive the importance of external factors and development strategies that facilitate the appointment to the role of ODL Library middle manager. They indicated that the only selected external factor (a factor over which a person has very little or no control) that could play a role in the ODL Library manager's career advancement is 'family support' as opposed to other insignificant contributors to career advancement such as luck, serendipity, age, gender or an employment equity policy. This was in particular the view of the respective groups of ODL Library middle managers relating to age-, language- and number-of-job-changes as reflected in the mean scores (Table 21a).

Based on the findings during interviews and the responses to open-ended questions, ODL Library middle managers clearly have different views on the value of employment equity, whereas institutional documents revealed that the ODL institution places a high premium on employment equity since it addresses aspects of equity and diversity which promote human excellence, cultural enrichment and social strength.

Development strategies which contribute to the appointment of ODL Library middle managers relate to selective development approaches, the gaining of experience and obtaining of qualifications. Significant approaches that facilitate the appointment of ODL Library middle managers relate to the development of a career plan, performing secondary leadership roles and attending management short courses. Challenges experienced by ODL Library middle managers in applying the approaches were indicated in an open-ended question. It pertained to succession planning, professional networking; the role of the line manager in the career plan and tracking the progress made in the execution of the plan. The lack of middle manager positions, in particular for those who aspire to move vertically in the management hierarchy, was also perceived by ODL Library middle managers to be a challenge.

Correlations calculated for this study revealed that there is a correlation between the number of approaches (that were used as strategies) and experience in career advancement.

Both experience and qualifications were indicated as significant contributors to the appointment of ODL Library middle managers. It was explained during interviews

that experience compliments formal qualifications since the two go hand-in-hand; that experience should be further enhanced through 'secondment' as a development strategy; and institutional documents revealed that, in accordance with certain policy stipulations, ODL experience can be enhanced by means of 'secondment', acting appointment or transfer to another post in the ODL Library.

It was noted in a response to an open-ended question that ODL Library middle managers obtained other qualifications in addition to LIS qualifications, particularly formal qualifications in management courses but that no one had obtained a formal ODL qualification. It was suggested during interviews that ODL short courses should benefit the development of middle managers and it was advised that the ODL concept be taught as part of the LIS curriculum in order to understand the theory to be applied in practice. It was further advised that managers who aspire to move vertically in the ODL Library management hierarchy should hold advanced qualifications.

Correlations calculated for this study revealed that there is a correlation between the number-of-qualifications-as-development strategy and success-experience-aspect-of-respect earned. This implies that as the number of qualifications increase perceptions of success (as earned respect) increase.

6.2.3 Internal factors and development strategies: facilitators of an optimal career path

A summary of the ODL Library middle manager's perception of internal factors and development strategies as facilitators of an optimal career path is further provided as a response to the study's related Research questions 4.2.2 and 4.3.2 Major 'importance' results explain that ODL Library middle managers clearly relate to the selected internal factors (intelligence, flexibility, enjoyment, ability, communication, determination and hard work) as contributors to career progression resulting in an optimal career path of ODL Library middle managers. This was confirmed by means calculations for different groups which are reflected in Table 16a. The most important internal factors that lead to an optimal career path are 'ability, communication, hard work and determination'. Similar to findings in the literature, this study confirmed that statistically significantly stronger opinions were more

specifically expressed regarding the importance of the factors of 'ability', 'communication', 'determination' and 'hard work'. These findings confirmed the findings regarding the importance of these factors as revealed in other studies on middle management development (Farmer and Campbell 1998; Golden 2006) as facilitators of an optimal career path. These concepts are also recognised in the context where ODL Library middle managers operate since they form part of the ODL institution's Talent Management plan which defines 'ability' as an essential quality that capacitates a person to perform and its drive towards high performance teams (University of South Africa. Department of Human Resources. 2014b:7). The value of 'hard work' as an important factor that contributes to a successful career path was expressed during interviews in terms of its relationship with 'determination' and 'attitude'; and it was pointed out that 'ability' must be coupled with 'hard work' in order to achieve success on the career path.

Findings flowing from the importance and performance ratings received through the survey questionnaire and the mean perception scores, which were calculated for the middle manager categories of age-, language- and number of job change levels reflected in Table 18a respectively, revealed that the development needs of ODL Library middle managers after the appointment pertain particularly to an understanding of the 'LIS environment and related services; management environment, including the management role and activities; and the ODL Library environment and related strategic plan.' It was indicated as a low importance rating that ODL Library middle managers do not place a high premium on the practicing of KM in the ODL Library environment.

Major findings from the 'importance' and 'performance' data relate to how ODL Library middle managers perceive development strategies and the mean calculations for the ODL Library groups reflected in Table 20a. It was indicated that the most important development strategies rated by ODL Library middle managers are management training, leadership development and formal postgraduate qualifications as contributors to an optimal career path. The value of networking and secondment, during which skills can be developed and practiced in the respective environments while being mentored by other managers, were suggested during interviews. Institutional documents, such as the institution's personal development

plans to be completed annually, revealed that leadership development strategies in addition to management training are applied. It was further revealed in institutional documents that the institution envisages the implementation of a Talent Management plan whereby staff can be equipped to perform their role. It explains that the development of talent contributes to a competent and motivated workforce, capable of delivering on its extensive educational model; and also to building specialised educational capacity and capabilities required by the institution's unique ODL model.

Correlations calculated for this study revealed that there is a correlation between the number of strategies followed and higher experience in success advancement.

However, investigation into how the own performance of ODL Library middle managers measures against their perceptions of the importance of development strategies (Research question 4.3.3) revealed that there is a lag between the importance of continued career development strategies and the use thereof. Support is required for the practicing of knowledge gained through the use of development strategies. This fact was confirmed by all ODL Library middle management categories of language, age and number of job changes as reflected in Table 20a and by participants during interviews.

6.2.4 Competencies: facilitators of an optimal career path

A summary of the ODL Library middle manager's perception of identified competencies as facilitators of an optimal career path is further provided as a response to the study's related Research question 4.4. Major findings are based on importance and performance data pertaining to the to six selected important competencies required to perform the role of ODL Library middle manager and the mean perception scores in Table 28a and 29a, which were respectively calculated for the middle manager categories of age-, language- and number of job change levels. The findings explain that ODL Library middle managers clearly relate to the selected competencies as they place a high rating on the importance of selected competencies as contributors to an optimal career path after the appointment. The order of importance of these competencies are 'emotional intelligence; planning and administration; communication; teamwork; strategic thinking; and globalisation'. The low importance of globalisation competency (compared to the other competencies)

was confirmed by mean score ratings which excluded globalisation from the perceived relevance of the competencies of communication, planning, teamwork, strategic thinking and emotional intelligence as very important/ relevant to career advancement and performance. This finding also relates to the views expressed during interviews by ODL Library middle managers operating on the respective layers of the middle management hierarchy.

The low perceived importance of globalisation was ascribed by managers to the fact that, when operating in the ODL environment, 'globalisation' is no longer considered to be different from the local environment and is therefore not rated as a competency which is critically important to be acquired. The view on the rating received for globalisation can be further explained by the results obtained on correlations calculated for this study. It was revealed that if emotional intelligence is perceived to be more important to good performance, participants' feeling in being successful in globalisation aspects is higher. This explains why the overall rating received for globalisation indicates significance. Since a high rating was obtained for the emotional intelligence competency, this explains the ODL Library middle managers' acceptance of globalisation.

The high rating of emotional intelligence was further explained by correlations calculated for this study as it was revealed that there is a correlation between the perceived importance of emotional intelligence for good performance and how successful the participants consider themselves to be in their current ODL middle manager post.

In order to enhance strategic action competency, it was suggested, in particular by the respective middle managers operating on different layers in the management hierarchy, that ODL Library middle managers should be developed through participation in the strategic planning of the ODL Library from the moment the planning commences.

However, a comparison of the perceived importance of the respective competencies with the successful use thereof (Research question 4.4.1) indicates a need for further development of all competencies. Responses to the questionnaire and interview questions revealed that support for the practicing of all competencies is

required.

6.3 CONCLUSIONS

In this section of the study the conclusions, based on the major research findings, are provided. The conclusions are presented in the order of the research questions and spell out the implications of the findings. The research findings were the premise on which the conclusions were made.

Conclusions are viewed as responses to the study's research objectives.

6.3.1 Conclusion on the ODL Library middle manager's perception of success

The following conclusions relate to criteria used by ODL Library middle managers to describe success and serve as a response to Research objective 1, which was set to determine criteria that describe success. The discussion that follows explains why the criteria are considered to be important to ODL Library middle managers; how they are used by them; and the implication of the conclusion.

It is concluded that ODL Library middle managers found the selected criteria for this study significant. It is clear from the survey responses received that they could relate to the selected criteria and that the criteria are perceived to be relevant. The conclusion on the relevancy of the selective criteria is ascribed to the fact that respondents were asked to indicate other success definitions; and their reasons for success based on other factors. Although responses to these questions were received, no additional success definition or other reason for the perception of own success was suggested. It can thus be deduced that the selected criteria that describe success can be used to describe success.

It is further concluded that ODL Library middle managers do not relate success primarily to one criterion when describing success, such as the traditional success criterion, namely hierarchical advancement. This was demonstrated by the fact that a significant percentage of ODL Library middle managers rated advancement in the hierarchy as neutral, not relevant or irrelevant, compared to the high premium they placed on other perceptions of the meaning of success. ODL Library middle managers have thus an understanding of how managers perceive success in terms

of the changed organisational context of career success reflected in the paradigm shift indicated in LIS research.

The study concluded that ODL Library middle managers use some criteria more often to describe success and that they can typically be classified as 'influencers' who are concerned with the impact of a person's work on the organisation'. Some are considered to be self-realisers with a focus on 'work-life balance' and others are experts who focus on 'respect earned due to competency'. The importance of work and life balance was further accentuated as it could be concluded in terms of correlations calculated for this study that there is a correlation between experience in being successful in balancing home and work life and a higher experience of being successfully appointed to the middle manager position.

However, this study concluded from the 'personal success' data that the ODL Library middle managers, in general, perceive their own performance towards success as lower than the perceived importance thereof.

The implication of the findings relating to Objective 1 is that ODL Library middle managers can use the selected criteria to describe success and that all criteria are considered important. Work/life balance is particularly important in terms of its influence as a facilitator of success on the career path. The own performance of ODL Library middle managers should be measured against the use of these criteria as significant facilitators of success on the ODL Library middle managers' career path.

This section concludes on criteria or definitions which ODL Library middle managers use to describe success; and to measure their own success experience.

6.3.2 Conclusion on the ODL Library middle managers' perception of factors

The following conclusions relate to essential development factors that facilitated the career advancement of ODL Library middle managers and serve as a response to Research objective 2, which was set to determine essential individual development factors that contribute to career growth. The discussion that follows explains why the respective factors are considered to be important to ODL Library middle managers and the subsequent implication of the conclusion.

It is concluded from the survey response that the ODL Library middle managers found only one external factor valuable, as opposed to the importance of other selected factors. The study confirmed that 'family support' is the only essential external factor, over which a person has very little or no control, that could play a role in the ODL Library manager's career advancement. The study confirmed that factors relating to age, gender, employment equity and geographical mobility have less of a significant influence on career success. This was the view of ODL Library middle managers who had more than 01-04 job changes as they felt even more negative about the influence of these factors.

The study further concluded that with regard to external factors that employment equity received a relatively low rating in terms of importance, whereas the qualitative findings based on interviews, institutional documents and responses to open-ended questions in the questionnaire reflected a rival response that indicated the benefits flowing from employment equity as a facilitator of career success.

Contrary to the findings of the study regarding the importance of external factors, the study concluded that internal factors (innate or developed) were considered essential by the participants since they overwhelmingly perceived these factors as very important to their continued performance in their current middle management positions. This conclusion is supported by the fact that no additional factors were added when an opportunity was provided through the questionnaire to give more information in an open-ended question.

Similar to the findings in the literature, this study confirmed that statistically significantly stronger opinions were more specifically expressed regarding the importance of the factors of 'ability', 'communication', 'determination' and 'hard work'. These concepts are also recognised in the context where ODL Library middle managers operate since they form part of the ODL institution's Talent Management plan.

The implications of the findings relating to Objective 2 are that with regard to external factors the importance of 'family support' as a facilitator of career success should be acknowledged, for example, in terms of balancing work and life activities; and in order to see the impact of employment equity on career success, an understanding

of the benefits flowing from diversity and equity in the workplace should be established amongst all ODL Library middle managers, while the personal development needs of employment equity appointees should be addressed. The implication of the conclusion on internal factors is that they should be considered as facilitators of success and be included in a development strategy for middle managers that takes into consideration the person's individual ability and potential while encouraging them to exercise hard work and determination.

This section concludes on essential individual development factors that contribute to the ODL Library middle managers' career growth.

6.3.3 Conclusion on the perception of the importance and use of development strategies

The following conclusions relate to development strategies that facilitated the optimal career path ODL Library middle managers and serve as a response to Research objective 3, which was set out to determine career development strategies relative to career growth. The discussion that follows explains why the development strategies are considered to be important to ODL Library middle managers; how they are used by them; and the implication of the conclusion.

The study concluded that qualifications and experience as career development strategies facilitated career growth both at the time of the appointment to the role of ODL Library middle manager and for the purpose of optimising the career path afterwards. The importance of obtaining qualifications as a career development strategy, is motivated by the facts that ODL Library middle managers hold relevant library qualifications as well as additional qualifications which demonstrate the trend of obtaining not only LIS qualifications but also management qualifications; qualitative data indicated a need for advanced qualifications on the LIS Master's level in order to operate in the senior levels, the need to develop ODL Library middle managers through formal ODL qualifications, and the need for library school curricula to include ODL education.

It is concluded that ODL Library middle managers can benefit from obtaining qualifications since correlations calculated for this study indicated that there is a

correlation between the number-of-qualifications-as-strategy and the success experience of success earned.

The importance of obtaining experience as a career development strategy is motivated by the fact that relevant experience such as workplace experience, ODL experience and experience in using the relevant qualifications facilitate the successful appointment of managers to their current positions.

The study further concluded from the 'number of development approaches/strategies' data and success correlations calculated for this study that there is a correlation between the number of development approaches/strategies followed and a higher experience in success advancement. The most important development actions that suggest pro-active career planning to which success is linked are 'personal career planning'; performing secondary management roles; attendance of management short courses; a desire for career advancement; and professional organisation networking'.

The study concluded that development strategies that lead to career growth after the appointment relate to strategies in support of development needs to perform successfully in the ODL Library middle manager environment. These pertain to environmental development needs to understand the library-, ODL-, management environments in which ODL Library middle managers operate.

This part of the study finally concluded that ODL Library middle managers perceive the 20 selected strategies that were investigated in this study, as significant. This means that ODL Library middle managers clearly relate to the selected career development strategies in terms of the high importance rating, but also because they did not suggest any other continuing development strategies when they were asked to do so in the open-ended question of the questionnaire. However, the study concluded that the practical application of development is slightly below the perceived importance of skills developed through the strategies.

Five implications were established in terms of the conclusions relating to Objective 3. These relate to qualifications as a development strategy meaning that ODL Library middle managers' should be encouraged to develop themselves formally by

obtaining advanced qualifications. This may benefit particularly ODL Library middle managers who perceive success as 'respect earned due to competency'. ODL Library middle managers must also be developed through

- gaining workplace experience, including ODL experience, while using relevant qualifications obtained to perform their role and grow according to their career plans;
- applying as many as possible development approaches that lead to the appointment of ODL Library middle managers in terms of the correlation between the number of development approaches applied and a higher experience in success advancement;
- attending to environmental development needs after the appointment of ODL Library middle managers that should be addressed as part of the development plan;
- practising the strategies so that the own performance of ODL Library middle managers that does not measure up against the importance of identified development strategies to be applied, can be addressed through an intervention to fill the knowledge gaps.

This section concludes on career development strategies relative to career growth.

6.3.4 Conclusion on the perception of the importance and use of competencies

The following conclusions relate to management competencies that facilitated an optimal career path of ODL Library middle managers and serve as a response to Research objective 4, which sets out to determine competencies relevant to the successful performance of the role of contemporary management. The discussion that follows explains why competencies are considered to be important to ODL Library middle managers; how they are used by them; and the implication of the conclusion.

It is concluded that ODL Library middle managers perceive the selected competencies pertaining to communication, planning and administration, team work, strategic action, globalisation, emotional intelligence and self-management as significant. A less important rating was, however, attached to globalisation. In terms of correlations calculated for this study, it was concluded that if emotional intelligence is perceived to be more important to good performance, participants' feeling in being successful in globalisation aspects is higher. The fact that ODL Library middle

managers indicated during interviews that they are content with the practising of the globalisation competency can be ascribed to the high rating obtained for the emotional intelligence competency.

The high rating of emotional intelligence and self-management was further explained by correlations calculated for this study which revealed that there is a correlation between the perceived importance of emotional intelligence and self-management to good performance and how successful the participants consider themselves to be in their current ODL middle manager post.

It is concluded that the strategic action competency should be further developed through the involvement of middle managers, operating on different layers in the management hierarchy, in strategic planning from the moment the planning commences.

However, a comparison of the perceived importance of the respective competencies with the successful use thereof indicates a need for further development of all strategies. Responses to the questionnaire and interview questions revealed that support for the practicing of all competencies is required.

The implications of the findings relating to Objective 4 are that the identified competencies selected for this study can be considered relevant to the successful performance of the role of contemporary management. It was concluded that all competencies should be further practiced and that there should be a strong focus on internalising the globalisation and strategic action competencies.

This section concludes on competencies relevant to the successful performance of the role of contemporary management.

6.3.5 Overall conclusion on the research problem

The aim of the study was to explore and explain influences such as selected factors and strategies in a development practice of middle managers at an ODL Library that could facilitate the achievement of personal career success. Career development strategies and development factors selected for a study on middle managers in another library type; and competencies with roots in the management sciences; as

well as strategies that are more specifically applied in an ODL environment were investigated in order to establish their value to ODL Library middle managers in South Africa. The study's outcome, which reflects overall conclusion to the research problem, points at the need for ODL Library middle management development in a structured way relative to important factors and strategies that facilitate the career path in the 'real' ODL Library world.

The respective conclusions of this study on which the recommendations are based, would encourage ODL Library middle managers to consider if and how the recommended factors and strategies can best fit into their PDP; how these should form part of the PDP and how progress should be monitored in a formal capacity.

6.4 RECOMMENDATIONS

At the beginning of the chapter it was stressed that recommendations would be based on the research results. This can be viewed as a response to Research objective 5 in this study, namely to make recommendations on the implementation of factors and strategies that promote the career success of ODL Library middle managers.

In the previous section the study concluded on the importance and use of identified factors and strategies, including competencies which affect the development of ODL Library middle managers. The conclusions were based on the research discussed in detail in Chapters Four and Five and summarised by way of introducing Chapter Six. Recommendations were subsequently based on the implication of the research conclusions and can be considered to be a response to the need for ODL Library middle management development discussed in Chapter One when it was stressed that development should be done in accordance with a plan or framework.

In terms of Objective 1 which pertains to career success, it is recommended that ODL Library middle managers use the selected criteria to describe success while taking the influence of work/life balance into consideration; and that they measure their own performance against these criteria as significant facilitators of success.

In terms of Objective 2 which pertains to development factors, it is recommended that ODL Library middle managers acknowledge the importance of 'family support'

as a facilitator of career success and its role in balancing work and life activities; and to foster an understanding of the benefits flowing from diversity and equity in the workplace in order to see the impact of employment equity on career success while addressing the development needs of employment equity appointees. Selected internal factors should be considered as facilitators of success and should be included in a development strategy for ODL Library middle managers who take into consideration the person's individual ability and potential while encouraging them to exercise hard work and determination.

In terms of Objective 3 which pertains to development strategies, it is recommended that ODL Library middle managers place a high premium on qualifications and experience as development strategies both before and after the appointment; follow as many possible development approaches that lead to the appointment of ODL Library middle managers; acknowledge their environmental development needs after the appointment that should be formally addressed as part of the development plan; and finally ensure that their own performance measures up against the importance of twenty identified career development strategies. This should include the identification of knowledge gaps, implementation of an intervention and tracking of developmental progress made in a formal capacity.

In terms of Objective 4 which pertains to competencies, it is recommended that the identified competencies selected for this study be considered relevant to the successful performance of the role of contemporary management. It is further recommended that all competencies should be further practised through an implementation plan which includes a focus on internalising the globalisation competency and strategic action competency.

These recommendations should be implemented in terms of a development framework developed from the findings of this study. The proposed framework is presented in the form of a table, Table 33, available in Appendix 13, part 1. By assessing the findings on the importance of factors and strategies that facilitate career success, ODL Library middle managers will foster an understanding of the ranking of development factors and strategies in accordance with their importance and of the development concepts which suggest a lag between perceived

importance and perceived personal attainment of career success.

Appendix 13, part 2 provides a summary of the development needs of ODL Library middle managers with recommendations:

1. To enhance ODL Library middle managers' perception of success
2. To foster prior to the appointment of aspiring ODL Library managers an understanding of factors and strategies that facilitate success
3. To foster an understanding of factors and strategies which optimise the ODL Library middle manager career path
4. To foster an understanding of competencies which optimise the ODL Library middle manager career path.

6.5 FUTURE VALUE OF THE STUDY

The value of the study for the future pertains to the implications of the research for theory and practice and a final statement on the results and recommendations for further research.

Contributions

The contribution of the study is embedded in the findings of this first case study investigation of an ODL Library's development practice for middle managers in South Africa. Its purpose was to examine the development needs in a large size ODL Library, with different layers in the middle management hierarchy; and to investigate the importance and use of selected development factors and strategies as facilitators of success on the career path of the relevant ODL Library middle managers. This contribution will in future enable and encourage ODL Library middle managers to assess how the selected factors and strategies can be applied to facilitate a successful career path. A framework for ODL Library middle management development (Appendix 13) serves as a response to a problem posed in the beginning of the study, namely why middle managers need to be developed and what the focus should be. It incorporates a final statement of critical important results relative to identified factors and strategies.

The implication of the study on theory is that it confirmed that a management-related

Library and Information Science study has a strong connotation with business management theories and human resource management. This is an indication that LIS theories need to adopt an inter-disciplinary approach. The study revealed that development factors and strategies which were tested in another type of business or library are applicable to the ODL Library environment. This study further showed that the use of a case study design with triangulation of data sources enabled the researcher to explain the impact of factors and strategies on the ODL Library middle manager's career path. In accordance with the guideline provided by Rowley (2002:20), statistical generalisation was thus possible and analytical generalisation could be further applied when results from previous research in another library type were compared with this research.

This case study research has collected data from multiple sources to enable the researcher to conclude on findings which are based on critical investigation. 'Meaning' is thus from data collected from the multiple resources through survey perceptions of participants; and data collected during interviews through semi-structured questions and from institutional documents. The research is original in terms of the ODL context in which the research was conducted; and the research findings are reliable as explained in the first part of Chapter Five. The study's contribution to the existing body of knowledge is on the topic of ODL Library middle manager development. The findings of the study will therefore be of interest to librarians who aspire to become ODL Library middle managers, scholars and particularly LIS educators and students who conduct research in staff development worldwide or consider development aspects to be included in the curriculum.

The study's contribution to practice is available in Appendix 13. It provides the facilitators of ODL Library middle management career success that serves as a development framework. The framework suggests that the practical application of developed competencies and the use of strategies are slightly below the perceived importance of skills that need to be developed through the selected strategies or competencies. Also in the case of ODL Library middle managers' perceived success, it is noted in general that they do not measure up to set, perceived importance of the success criteria. This aspect should be addressed by the line managers of the ODL Library middle managers of this specific research site. Specific attention should be

given to the research findings relating to some influences on the career path such as employment equity; globalisation as a competency; and the need expressed by ODL Library middle managers with regard to their role to be played in strategic management; as well as the factors and strategies listed in order of importance in the development framework.

Suggestions for future research

Since the concepts investigated in this research were a first of its kind in an ODL Library environment, it is suggested that further research be conducted as follows:

- Follow up research on the middle managers' response to selected factors and strategies in another ODL Library environment that can be compared with the findings of this study.
- Follow up research in this ODL Library once the institution's Talent Management project is established and fully implemented in order to investigate the benefits derived from acknowledging, for example, 'employment equity' and 'ability' in developing talent on the middle manager level.
- Follow up research in this ODL Library to establish whether the gap between the perceived importance of selected factors and strategies and the use thereof has been reduced.

Other recommended topics for future studies are:

- An exploration as to whether or not advanced qualifications for ODL Library directors are a desirable element for career success.
- The role of ODL Library middle managers in strategic management.

With the suggested items for future research and by using the resultant data and analysis of this study, the purpose of the study has been served. Firstly, since ODL institutions can use the findings to assist them when developing ODL Library middle managers or staff who aspire to move vertically in the management hierarchy. Secondly, since the findings of the study will guide ODL Library middle managers in acknowledging factors and strategies which were used by previous supervisors,

managers, deputy directors and directors who have achieved career success in the ODL Library middle management hierarchy. The findings of this study can be used as a basis from whence direction for their own career development can commence.

REFERENCES

- Agresti, A. 1992. A survey of exact inference for contingency tables. *Journal of Statistical Science*, 7(1): 131-153.
- American College of Research Libraries. 2010. Top ten trends in academic libraries: a review of the literature. *C&RL News*, June: 286-292.
- Argyris, C. 1960. *Understanding organizational behavior*. London: Tavistock.
- Babbie, ER. 1990. *Survey research methods*. Belmont: Wadsworth.
- Babbie, ER. 2005. *The basics of social research*. 3rd edition. Belmont: Wadsworth.
- Babbie, ER & Mouton, J. 2011. *The practice of social research*. South African edition. Oxford: Oxford University Press.
- Barnard, C. 1938. *The functions of the executive*. Cambridge, Mass: Harvard University Press.
- Bavendam Research Institute. 2011. Special report: 10 secrets to being the employer of choice. Literature online.
Available at: <http://www.WednetPa.com/downloads/10-Secrets-to-Being-an-Employer-of-Choice.doc> (Accessed 24 June 2015).
- Becker, B, Dawson, P, Devine, K, Hannum, C, Hill, S, Leydens, S, Matuskevich, D, Traver, D & Palmquist, M. 2005. Case studies. Writing@CSU. Colorado State University, Department of English. Literature online.
Available at: <http://writing.colostate.edu/guides/page.cfm?pageid=1297&guideid=60> (Accessed 24 June 2015).
- Beckhard, R. 1969. *Organisation development: strategies and models*. California: Addison-Wesley.
- Benbasat, I, Goldstein, D & Mead, M. 1987. The case research strategy in studies of information systems. *MIS Quarterly* 11(3): 368-386.
- Bensman, SJ. 2007. Donald J. Uruquhart and the integration of science with librarianship: part 2. *Interlending & Document Supply* 35(3):369:386.

Bernthal, PR, Rioux, SM & Wellins, RW. 2004. *The leadership forecast: benchmarking study*. Bridgeville: HR Benchmark Group.

Available at: <http://www.ddiworld.com/pdf/cpgn53.pdf>

Brech, EFL. 1965. *Organisation: the framework of management*. London: Longmans.

Brine, A. 2004. *Continuing professional development: a guide for information professionals*. Oxford: Chandos.

Business dictionary. 2013. Sv 'middle management'.

Available at: <http://BusinessDictionary.com> (Accessed 9 January 2013).

Carlin, AP. 2003. Disciplinary debates and bases of interdisciplinary studies: the place of research ethics in library and information science. *Library and Information Science Research* 25(1): 3-18.

Caswell, BA. 1982. *Success in statistics*. Hong Kong: John Murry.

Cawthorne, JE. 2010. Leading from the middle of the organization: an examination of shared leadership in academic libraries. *The Journal of Academic Librarianship* 36(2): 151-157.

Chatman, EA. 1992. The role of mentorship in shaping public library leaders. *Library Trends* 40: 492-512.

Cheese, P. 2006. The Accenture performance workforce study. *Rapport*, 15 November.

Chok, NS. 2008. *Pearson's versus Spearman's and Kendall's correlation coefficients for continuous data*. Winona State University. 2008. p4-5.

Available at: http://d-scholarship.pitt.edu/8056/1/Chokns_etd2010.pdf. (Accessed 8 February 2016).

Cole, GA & Kelly, P. 2011. *Management theory and practice*. 7th edition. Andover, Hampshire, UK: South Western Cengage Learning.

Cooper, CL. 2005. *Leadership and management in the 21st century: business challenges of the future*. Oxford: Oxford University Press.

Creswell, JW. 2003. *Research design: qualitative, quantitative, and mixed research methods approaches*. 2nd edition. Thousand Oaks: Sage.

Creswell, JW. 2009. *Research design: qualitative, quantitative and mixed methods approaches*. 3rd edition. Los Angeles, CA: Sage.

Creswell, JW, Ebersohn, L, Eloff, I, Ferreira, R, Ivankova, NV, Jansen, JD, Nieuwenhuis, J, Pietersen, J, Plano Clark, VL, & Van der Westhuizen, C. 2010. *First steps in research*. Edited by K Maree. Pretoria: Van Schaik.

Creswell, JW. 2014. *Research design: qualitative, quantitative, mixed methods approaches*. 4th edition. CA: Sage.

Cronje, GJ de J, Du Toit, GS, Motlatla, MDC & Marais, A de K. 2007. *Introduction to business management*. 7th edition. Cape Town: Oxford University Press.

Daft, RL & Marcic, D. 2009. *Management: the new workplace*. 6th edition. Mason, Ohio: South-Western Cengage Learning.

Davenport, P. 2001. Universities and the knowledge economy. *Ivey Business Journal* 65(5): 64-69.

Day, DV. 2001. Leadership development: a review in context. *Leadership Quarterly* 11(4): 581-613.

Dessler, G. 1985. *Management fundamentals*. 4th edition. Virginia: Reston Publishing.

Dictionary.com. 2015. Sv 'success'. 2015. Oakland, CA: Lexico Publishing.

Available at: <http://dictionary.reference.com/browse/success> (Accessed 4 August 2015).

Dul, J & Hak, T. 2008. *Case study methodology in business research*. Oxford: Elsevier.

Du Toit, GS, Erasmus, BJ & Strydom, J. 2012. *Introduction to business management*. 8th edition. Oxford: Oxford University Press.

Encyclopaedia Britannica, 2015. Library science. (Accessed 8 August 2015).

Evans, GE . 1983. *Management techniques for librarians*. 2nd ed. New York: Academic Press.

- Farmer, J & Campell, F. 1998. *Continuing professional development and career success: is there a causal relationship?* British Library Research and Innovation Report 112. London: British Library and Innovation Center.
- Fayol, H. 1949a. *General and industrial management*. London: Pitman and Sons.
- Fayol, H. 1949b. General principles of management in Miner, John B. (ed.) 1995. *Administrative and management theory*. Aldershot, Hants, England: Dartmouth. pp 87-111.
- Ferriero, DS. 1982. ARL directors as protégés and mentors. *Journal of Academic Librarianship* 7(6): 358-365.
- Finn, JA. 2005. *Getting a PhD: an action plan to help manage your research, your supervisor and your project*. London: Routledge.
- Floyd, SW & Wooldridge, B. 1996. *The strategic middle manager: how to create and sustain competitive advantage*. San Francisco: Jossey-Bass.
- Floyd, SW & Wooldridge, B. 2000. *Building strategy from the middle: Reconceptualising strategy process*. Thousand Oaks: Sage.
- Fowler, FJ. 1993. *Survey research methods*. 2nd ed. Newbury Park, California: Sage.
- Gibbert, M & Ruigrok, W. 2010. The “what” and “how” of case study rigor: three strategies based on published work. *Organisational Research Methods* 13: 710-737.
- Gideon, L. 2012. *Handbook of survey methodology for the social sciences*. New York: Springer.
- Glaser, BG & Strauss, A. 1967. *Discovery of grounded theory: strategies for qualitative research*. Mill Valley, Ca.: Sociology press.
- Glazier, JD & Grover, R. 2002. A multi-disciplinary framework for theory building. *Library Trends* 50(3): 317-329.
- Golden, J. 2006. Career development directions for the public library middle level manager. *Advances in Library Administration and Organisation* 23: 173-244.

- Gooding, V. 2005. *What will tomorrow's organization/company look like over the next couple of decades?* Oxford: Oxford University press.
- Gray, DE. 2004. *Doing research in the real world*. London: Sage.
- Greiner, JM. 1985. A comparative study of the career development patterns of male and female library administrators in large public libraries. *Library Trends* 34: 259-289.
- Grix, J. 2010. *The foundations of research*. 2nd edition. London: Palgrave MacMillan.
- Grover, R & Greer, RC. 1991. The cross disciplinary imperative of LIS research. In McClure, CR & Herson, P. (eds). *Library and information science research: perspectives and strategies for improvement*. Norwood, NJ: Ablex Publishing. p.101-113.
- Guetzkow, J, Lamont, M & Mallard, G. 2004. What is originality in the Humanities? *American Sociological Review* 69: 190.
- Hafsi, T & Farashahi, M. 2005. Applicability of management theories to developing countries: a synthesis. *Management International Review* 45(4): 483-511.
- Harris, RM & Tague, JM. 1989. Reaching the top in Canadian librarianship: A biographical study of sex differences in career development. *Library Quarterly* 59: 116-130.
- Haycock, K & McCallum, L. 1997. Urban public library directors. Who are they? Where did they come from? *Feliciter* 43(1): 34-37.
- Hellriegel, D, Jackson, SE, Slocum, J, Staude, G, Amos, T, Klopper, HB, Louw, L & Oosthuizen, T (eds). 2004. *Management*. 2nd South African edition. Cape Town: Oxford University Press Southern Africa.
- Hellriegel, D, Jackson, SE, Slocum, J, Staude, G, Amos, T, Klopper, HB, Louw, L & Oosthuizen, T (eds). 2012. *Management*. 3rd South African edition. Cape Town: Oxford University Press.
- Hellriegel, D, Jackson, SE, Slocum, J, Louw, L, Staude, G, Amos, T, Klopper, HB, Louw, M, Oosthuizen, T, Perks, S & Zindiye, S (eds). 2013. *Management*. 4th South African edition. Cape Town: Oxford University Press.

- Henning, JC. 2010. Management of open distance libraries with reference to learner support. *Library Management: African Perspectives* 31(6): 440-450.
- Holt, DH. 1987. *Management: principles and practices*. Englewood Cliffs: Prentice Hall.
- Honey, P. 1986. Styles of learning, in *Handbook of management development*, edited by A Mumford. 2nd edition. Vermont: Gower: 101-111.
- Howze, P. 2003. From core competencies to desired traits: hiring a head of reference for the new millennium. *The Reference Librarian* 39(81): 17-33.
- Huy, QN. 2002. Emotional balancing of organizational continuity and radical change: The contribution of middle managers. *Administrative Science Quarterly* 47(1): 31-69.
- Igwe, UO. 2011. *Libraries without walls and open and distance learning in Africa: The Nigerian experience*. <http://wikieducator.org> (Accessed 7 January 2012).
- Imenda, S. 2014. Is there a conceptual difference between theoretical and conceptual frameworks? *Journal of Social Science*, 38(2): 185-195.
- Institute of Directors. Southern Africa. 2009. *King code of governance for South Africa*. Available at: www.ngopulse.org.../king_code_governance_for_sa_2009_updated...South (Accessed 11 February 2016).
- Jack, EP & Raturi, AS. 2006. Lessons learned from methodological triangulation in management research. *Management Research News* 29(60): 345-357.
- Johnson, R. 2002. Learning to manage the university: tales of training and experience. *Higher Education Quarterly* 56(1): 33-51.
- Johnson RB, Onwuegbuzie AJ & Turner LA. 2007. Toward a definition of mixed method research. *Journal of Mixed method Research* 9(3):322-340.
- Kanter, R. 2004. The middle manager as innovator. *Harvard Business Review* 82(7-8): 150-161.
- Katz, RN & Salaway, GS. 2004. Key findings: Information technology: Leadership in higher education: The condition of the community. EDUCAUSE Center for Applied

- Research (ECAR), January, 1-10. Available at:
<https://net.educause.edu/ir/library/pdf/EKF/ekf0401.pdf> (Accessed 14 September 2015).
- Kiggundu, MK, Jorgenson, JJ & Hafsi, T. 1983. Administrative theory and practice in developing countries: a synthesis. *Administrative Science Quarterly* 28(1): 66-84.
- Kimber, R. 2001. Editorial: referencing style. *The Journal of Documentation* 57(3): 329.
- Kirk, TG. 2004. The role of management theory in day-to-day management practices of a college library director. *Library, Administration and Management* 18(1): 35-38.
- Kittleson, MJ. & Brown, SL. 2005. E-mail versus web survey response rates among health education professionals. *American Journal of Health studies*, 20(1/2): 7-14.
- Leahy, L. 2003. Managing an academic reference department. *The Reference Librarian* 39(81): 5-15.
- Leedy, PD & Ormrod, JE. 2005. *Practical research, planning and design*. Upper Saddle River, NJ: Pearson.
- Library and Information Association of South Africa. 2015. Code of ethics and conduct. Available at: <http://www.liasa.org.za/about/rules/conduct> (Accessed 24 June 2015).
- Liehr, P & Smith, MJ. 1999. Middle range theory: spinning research and practice to create knowledge for the new millennium. *Advances in Nursing Science*, 21(4): 81-91.
- Lynch, Beverly P. (ed.) [1985] *Management strategies for libraries: A basic reader*. New York: Neal-Schuman.
- Lynch, BP. 1998. The development of the academic library in American higher education and the role of the American librarian, in TF Mech and GB McGabe (eds) *Leadership and academic librarians*. London: Greenwood Press: 3-21.
- MacNeil, CMW. 2004. Exploring the supervisor role as facilitator of knowledge sharing in teams. *Journal of European Industrial Training* 28(1): 93-102.
- Marcum, D. 1983. Management training for research management. *Advances in Library Administration and Organisation* 2: 1-20.

Mavodza, J. 2010. Knowledge management practices and the role of an academic library in a changing information environment: the case of the metropolitan college of New York. DLitt et Phil Information Science, University of South Africa, Pretoria.

Mavodza, J. 2010. Knowledge management practices and the role of an academic library in a changing information environment: the case of the metropolitan college of New York. DLitt et Phil Information Science, University of South Africa, Pretoria.

Available at: http://uir.unisa.ac.za/bitstream/handle/10500/3945/thesis_mavodza_j.gdf;jsessionid=1DA6B92216D7C5B769AB10E8447COBDF?sequence=1

Mayo, E. 1949. *The social problem of an industrial civilisation*. London: Routledge and Kegan Paul.

Mbambo-Thata, B. 2010. Assessing the impact of new technology on internal operations: With special reference to the introduction of mobile phone services at UNISA Library. *Library Management* 31(6): 466-475).

McClure, C. 1980. Library management: Can they manage? Will they lead? *Library Journal* 5: 2388-2391.

McClure, CR & Samuels, AR. (eds.) 1982. *Strategies for library administration: Concepts and approaches*. Littleton, Colo.: Libraries Unlimited.

McGrath, WE. 2002. Explanation and prediction: building a unified theory of librarianship, concept and review. *Library Trends* 50(3):350-371.

McGurk, P. 2009. Developing "middle leaders" in the public services? The realities of management and leadership development for public managers. *International Journal of Public Sector Management* 22(6): 464-477.

McKechnie, LER & Pettigrew, KE. 2002. Surveying the use of theory in library and information science research: a disciplinary perspective. *Library Trends* 50(3): 406-417.

McNeer, E. 1988. The mentoring influence in the careers of women ARL directors. *Journal of Library Administration* 9(2): 23-32.

- Menon, MB. 2007. Reflections on quality assurance in open distance learning, in *Workshop on Performance indicators for quality assurance in distance higher education. Colombo, Sri Lanka, 14-16 August 2007*. Available at: <http://www.col.org/resources/speeches/2007presentations/Pages/2007-08-16.aspx> (Accessed 24 June 2015).
- Merriam, SB. 1998. *Qualitative research and case study applications in education*. 2nd edition. San Francisco: Jossey-Bass Publishers.
- Mintzberg, H. 1973. *The nature of managerial work*. New York, N.Y.: Harper and Row.
- Mintzberg, H. 1990. The manager's job: Folklore and fact. *Harvard Business Review* 68(2): 163-176.
- Moore, R. 2006. Building leadership for strategic development. HESA Leadership Summit, Stellenbosch. [Unpublished].
- Moran, BB, Stueart, RD & Morner, CJ. 2013. *Library and information center management*. 8th ed. Santa Barbara, California: Libraries Unlimited.
- Moropa, R. 2010. Academic libraries in transition: Some leadership issues - a viewpoint. *Library Management: African Perspectives* 31(6): 381-390.
- Mouton, J. 2010. *How to succeed in your master's and doctoral studies: A South African guide and resource book*. Pretoria: Van Schaik.
- Mumford, A. 1994. Effectiveness in management development, in *Handbook of management development*, edited by A Mumford. 4th edition. Brookfield, Vermont: Gower. p.3-20.
- Nazim, M & Mukherjee, B. 2013. Knowledge management competencies required among library and information science professionals: An Indian perspective. *Library Review* 62(6/7): 375-387.
- Ngulube, P. 2005. Research procedures used by Master of Information studies students at the University of Natal in the period 1982-2002 with special reference to their sampling techniques and survey response rates: a methodological discourse. *The International Information and Library Review* 37(2): 127-143.

- Ngulube, P. 2015. Trends in methodological procedures used in knowledge management studies (2009-2013). *African Journal of Library, Archives and Information Science* 25(2):125-143.
- Ngulube, P, Mathipa, ER & Gumbo, MT. 2015. Theoretical and conceptual framework in the social sciences, in Mathipa, ER & Gumbo, MT. (eds). *Addressing research challenges: Making headway in developing researchers*. Noordwyk: Mosala-MASEDI Publishers & Booksellers. p.43-66.
- Nienaber, H. 2010. Conceptualisation of management and leadership. *Management Decision* 48(5): 661-675.
- Online dictionary*. 2015. Sv 'success'. Available at: dictionary.reference.com/browse/success (Accessed 4 August 2015).
- Orenstein, DI. 2002. Being in the library business: an entrepreneurship primer for library administrators. *Library Administration and Management* 16(2): 83-91.
- O'Toole, L, Meier, K & Nicholson-Crotty, S. 2005. Managing upward, downward and outward: networks, hierarchical relationships and performance. *Public Management Review* 7(1): 45-68.
- Ouy Nguyen, H. 2001. In praise of middle managers. *Harvard Business Review* 79(8): 72-79.
- Parsloe, E.1995. *The manager as coach and mentor*. London: Institute of Personnel Development.
- Pergander, M. 2003. Experiences of early career public library directors. *Public Libraries* 42(4): 252-254.
- Phillips, EM & Pugh, DS. 2010. *How to get a PhD: A handbook for students and their supervisors*. 5th edition. Berkshire: Open University Press.
- Ponti, M. 2008. ALIS collaborator to bridge a research-practice gap. *Library Management*, 29(4): 265-277.

Pugh, L. 2005. *The organizational design and development of hybrid libraries: structure, leadership, management styles, and philosophy, professional and personal development*. London: Library and Information Research Group.

Raubenheimer, J. 2004. Leadership roles in academic information service enterprises: the attitudes of library staff towards a re-engineered leadership driven enterprise. MA Information Science dissertation, University of South Africa, Pretoria.

Raubenheimer, J & Muller, H. 2006. Rethinking leadership roles for the academic library: The attitudes of staff towards a leadership-driven academic information service enterprise. Available at: <http://etd.unisa.ac.za/ETD-db/theses/available/etd-04052005-11943/unrestricted/Theseis.PDF> (Accessed 19 January 2014).

Readers Digest English-Afrikaans dictionary. 1994. Cape Town: The Readers Digest Association of South Africa.

Reddy, VV & Manjulika, S. 2006. *Towards virtualization: Open and distance learning*. New Delhi: Kogan Page.

Reference for business. 2015. Sv 'Management levels'.

Available at:
<http://www.referenceforbusiness.com/management/LogMar/ManagementLevels>
(Accessed 21 May 2015).

Riccio, SJ. 2010. Talent management in higher education: developing emerging leaders within the administration at private colleges and universities. D.Ed.(Educational Administration: Educational Leadership and Higher Education). Lincoln: University of Nebraska-Lincoln.

Available at:
<http://digitalcommons.unl.edu/cgi/viewcontent.cgi?article=1034&context=cehsedaddiss>
(Accessed 24 June 2015).

Rizzo, JR. 1980. *Management for librarians: Fundamentals and issues*. Westport, Conn.: Greenwood Press.

Robbins, SP & DeCento, DA. 2008. *Fundamentals of management: essential concepts and applications*. 6th edition. Upper Saddle River: Pearson Education.

Roget's II: The new thesaurus. Expanded edition. Boston: Houghton Mifflin Company.

- Rooney, MP. 2010. The current state of middle management: preparation, training, and development in academic libraries. *The Journal of Academic Librarianship* 36(5): 383-393.
- Roythorne-Jacobs, HL. 2000. The experience of non coping on middle management level. MA dissertation, University of South Africa, Pretoria.
- Rowley, J. 2002. Using case studies in research. *Management Research News* 25(1): 16-27.
- Sayles, LR. 1993. *The working leader: the triumph of high performance over conventional management principles*. New York: The Free Press.
- Schwandt, TA. 2000. Three epistemological stances for qualitative inquiry. In: NK Denzin, YS Lincoln (Eds.): *Handbook of qualitative research*. 2nd edition. Thousand Oaks, CA: Sage, 189-213.
- Slocum, J. 2015. Item statistics pertaining to competencies that lead to managerial success. E-mail to J Raubenheimer, 6 January 2015.
- South Africa. Protection of Personal Information Act 4 of 2013. 2013.
Available at: available at: http://www.saflii.org/za/legis/consol_act/popia2013380.pdf
(Accessed 10 February 2016).
- Spiegel, MR & Stephens, LJ. 2014. *Schaums' Outline Series: Statistics*. 4th edition. New York: McGraw-Hill.
- Statistical Analysis System Institute. 2013a. *Base SAS 9.4 procedures guide: statistical procedures*. 2nd edition. Cary,NC: SAS Institute incorporated.
- Statistical Analysis System Institute. 2013b. *SAS/Stats 9.4 procedures guide: statistical procedures*. 2nd edition. Cary,NC: SAS Institute incorporated.
- Stavrou, P. 2011. *Women's employment advancement in public and political life*. Egkomi: European Working Conditions Observatory.
- Steyn, EF. 2006. *Managerial competencies among first-line news managers in South Africa's mainstream media: a newsroom management framework*. Doctor of Philosophy thesis at North–West University, Potchefstroom.

- Steyn, E & Steyn, TFJ. 2006. Managerial competencies among first-line news room managers at small to medium-sized mainstream media enterprises in South Africa. *South African Journal of Economic and Management Science* 9(3): 322-340.
- Stewart, R. 1991. *Managing today and tomorrow*. Houndmills: MacMillan Academic and Professional.
- Stoddart, C. 1987. Developing your people, in *Handbook of management skills*. Billing and Sons Limited. Worcester: Gover:271-280.
- Sturges, J. 1999. What it means to succeed: Personal conceptions of career success held by male and female managers at different ages. *British Journal of Management* 10: 239-252.
- Sturges, J. 2015. *Item statistics on content validity pertaining to career success*. E-mail, 19 January 2015.
- Sutherland, MM. 2004. Factors affecting the retention of knowledge workers. D Commerce dissertation, Rand Afrikaans University, Johannesburg.
- Talesra, H. 2004. *Open and distance learning: Global challenges*. Delhi: Authorspress.
- Tashakkori, A & Teddlie, C. 1998. *Mixed methodology: combining qualitative and quantitative approaches*. London: Sage.
- Tashakkori, A & Creswell, JW. 2007. Editorial: The new era of mixed methods. *Journal of Mixed Methods Research*, 1(3):3-7.
- Taylor, FW. 1911. *The principles of scientific management*. New York: Harper and Brothers.
- Trosow, SE. 2000. Organizational theory in library and information science education. *Journal of Education for Library and Information Science* 41(2): 129-140.
- Unisa Library. 2009. ODL and the Unisa Library. [Unpublished].
- Unisa Library. 2014a. Branch libraries and subject libraries. [Unpublished].
- Unisa Library. 2014b. Pillars in support of ODL services. [Unpublished].
- Unisa Library. 2014c. Unisa Library 2014 strategic plan. Revised. [Unpublished].

Unisa Library. 2015a. Budget. [Unpublished].

Unisa Library. 2015b. Job descriptions. [Unpublished].

Unisa Library. 2015c. Personal development plan. [Unpublished].

Unisa Library. 2015d. Staff list. [Unpublished].

Unisa Library. 2015e. Structure. [Unpublished].

University of South Africa (s.d.) Unisa 2015 Revisited.

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/strategic_planning/docs/2015_StrategicPlan_revisited.pdf (accessed 15 December 2015).

University of South Africa. 2000. *Research in the social sciences: study guide for RSC201-H*. KJ Collins, GM du Plooy & MM Grobbelaar. Pretoria: Unisa.

University of South Africa. 2008. Open distance learning policy. Version 5. [Unpublished].

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/tuitionpolicies/docs/OpenDistanceLearning_Council3Oct08.pdf (Accessed 14 September 2015).

University of South Africa. 2013. Recognition of prior learning (RPL) policy.

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/tuition_policies/docs/Policy%20-%20Recognition%20of%20Prior%20Learning%20-%20rev%20appr%20-%20Council%20-%202005.04.2013.pdf (Accessed 23 October 2015).

University of South Africa. 2014a. Institutional statistics.

Available at: <http://heda.unisa.ac.za/indicatordashboard/default.aspx> (Accessed 20 October 2015).

University of South Africa. 2014b. Unisa 2013-2015: towards a high performance university. [Unpublished].

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/projects/docs/Towards_a_High_Performance_University_2013-2015_Feb2015.pdf (Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2010a. Guidelines for education, training and development. [Unpublished].

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr/hrd/docs/HRD-Guidelines_Training-Development.pdf (Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2010b. Unisa management and leadership development strategy: "Building Unisa's future leaders". [Unpublished].

Available at:

<http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr/hrd/docs/ManagementLeadershipStrategy.pdf> (Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2013a. Policy on the recruitment, selection, appointment and related matters for permanent employees on levels P5 to P18.

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr_policies/docs/Policy%20for%20Recruitment%20%20Selection%20and%20Appointment%20of%20Employees%20on%20P18%20to%20P5%20-%20appr%20Council%20-%202013.pdf (Accessed 23 October 2015).

University of South Africa. Department of Human Resources. 2014a. Human resources training policy. [Unpublished].

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr_policies/docs/Human%20Resources%20Training%20%20Policy%20-%20appr%20Council%20-%202013.04.2014.pdf (Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2014b. Talent management for talent builders: a manager's guide. [Unpublished].

Available at:

<http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr/hrd/tmanage/docs/T%20M%20Guide%202013.pdf> (Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2014c. Talent management policy. [Unpublished].

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/hr_policies/docs/Policy%20-%20Talent%20Management%20-%20appr%20Council%20-%2019.09.2014.pdf

(Accessed 14 September 2015).

University of South Africa. Department of Human Resources. 2015. Institutional performance management: performance agreement for managers. [Unpublished].

University of South Africa. Department of Research. 2013. Policy for conducting research involving Unisa staff, students or data.

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/res_policies/docs/Policy%20-%20Research%20Involving%20UNISA%20-%20staff%20students%20data%20-%20rev%20appr%20Council%20-%2020.09.2013.pdf (Accessed 14 September 2015).

University of South Africa. Department: Research.2014. Policy on research ethics.

Available at:

http://staffcmsys.unisa.ac.za/cmsys/staff/contents/departments/res_policies/docs/Policy%20on%20Research%20Ethics%20-%20rev%20appr%20-%20Council%20-%2020.06.2014.pdf (Accessed 14 December 2015).

Uquh, AD. 2011. Personnel management theories and their implications for libraries. *Library Philosophy and practice* March: 1-5.

Uyterhoeven, HER. 1989. General managers in the middle. *Harvard Business Review* :1-10.

Weber, M. 1947. *The theory of social and economic organization*, transcribed by MA Henderson and T Parsons. New York: Free press.

Wikren, M. 2005. Critical realism as a philosophy and social theory in information science. *Journal of Documentation*, 61(1):11-22.

Wood, EA. 2007. *Beyond survival: managing academic libraries in transition*. Westport, CT: Libraries Unlimited.

Yin, RK. 1994. *Case study research: a design and methods*. 2nd edition. Thousand Oaks, CA: Sage.

Yin, RK. 2003. *Case study research: design and methods*. Thousand Oaks, CA: Sage.

Yin, RK. 2009. *Case study research: design methodology*. Applied Social Research series, v. 5. 4th edition. Thousand Oaks: Sage.

Zadeh, LA. 1965. Fuzzysets. *Information and Control* 8:338-353.

Zaleznik, A. 1977. Managers and leaders: are they different? *Harvard Business Review*, 55(3):67-78.

Available at: <http://0->

[search.ebscohost.com/oasis.unisa.ac.za/login.aspx?direct=true&db=bth&AN=3867468&site=e-ehost-live&scope=site](http://0-search.ebscohost.com/oasis.unisa.ac.za/login.aspx?direct=true&db=bth&AN=3867468&site=e-ehost-live&scope=site) (Accessed 14 December 2015).

APPENDICES

APPENDIX 1: ETHICAL CLEARANCE LETTER



Department of Information Science

College of Human Sciences

Date: 01 October 2014

Proposed title: Developing library middle management in the context of knowledge management in an open distance learning (ODL) environment

Principal investigator: Raubenheimer Jenny

Student number: 32759207

Reviewed and processed as: Class approval (see paragraph 10.7 of the UNISA. Guidelines for Ethics Review)

Approval status recommended by reviewers: Approved

The Research Ethics Committee of the Department of Information Science in the College of Human Sciences at the University of South Africa has reviewed the proposal and considers the methodological, technical and ethical aspects of the proposal to be appropriate to the tasks proposed. Approval is hereby granted for Raubenheimer Jenny (32759207) to proceed with the study in strict accordance with the approved proposal and the ethics policy of the University of South Africa.

In addition, the candidate should heed the following guidelines:

- To only start this research study after obtaining informed consent from the interviewees
- To carry out the research according to good research practice and in an ethical manner
- To maintain the confidentiality of all data collected from or about research participants, and maintain security procedures for the protection of privacy
- To notify the committee in writing immediately if any adverse event occurs.

Kind regards

A handwritten signature in black ink, appearing to read 'SC Ndwandwe', is written over a light blue horizontal line.

Mr SC Ndwandwe
Chair: Research Ethics Committee
Department of Information Science
Tel + 2712 429 6037



University of South Africa
Priller Street, Middelburg Ridge, City of Tshwane
PO Box 392 UNISA 0009 South Africa
Telephone: +27 12 429 3111 Facsimile: +27 429 12 429 4150
www.unisa.ac.za

APPENDIX 2: ETHICAL CLEARANCE CERTIFICATE



PROF L LABUSCHAGNE
EXECUTIVE DIRECTOR: RESEARCH DEPARTMENT
Tel: +27 12 429 6368 / 2446
Email: llabus@unisa.ac.za
Address: Theo van Wijk Building, 10th Floor, Office no. 50 (TvW 10-50)

17 November 2014

Mrs. Janette Raubenheimer
Department of Information Science
College of Human Sciences
Unisa

Dear Mrs. J. Raubenheimer

PERMISSION TO DO RESEARCH INVOLVING UNISA STAFF AND DATA

A study into: "Developing library middle management in the context of knowledge management in an ODL environment."

Your application regarding permission to conduct research involving Unisa staff and data in respect of the above study has been received and was considered by the Research Permission Subcommittee of the Unisa Senate Research and Innovation and Higher Degrees Committee (SRIHDC) on 12 November 2014.

It is my pleasure to inform you that permission has been granted for this study, with the following proviso, for the period between 20 November 2014 and 28 February 2015.

1. Permission is granted for the use of the available list of staff emails referred to in your application for permission to involve Unisa staff in the research.
2. Unisa unpublished reports contain employees' personal data. In line with the Protection of Personal Information (POPI Act), Act No. 4 of 2013, the RPSC cannot give you access to these records. However, as pointed out in your application that the Library Senior Management has given you permission to use these unpublished reports, the RPSC would request that you furnish this



University of South Africa
Preller Street, Muckleneuk Ridge, City of Tshwane
PO Box 392 UNISA 0003 South Africa
Telephone: +27 12 429 3111 Facsimile: +27 429 12 429 4160
www.unisa.ac.za

Committee with the written permission, prior to accessing and using Unisa unpublished reports.

3. The RPSC further requires that all such employee data will be de-identified and reported in aggregate terms in any report resulting from the research.

The Department: Legal Services considers requests for access to records of the University of South Africa in accordance with the Promotion of Access to Information Act, Act No. 2 of 2000 and the Protection of Personal Information Act, Act No. 4 of 2013.

We would like to wish you well in your research undertaking.

Kind regards

pp. Dr Retha Visagie Manager: Research Integrity
PROF L LABUSCHAGNE
EXECUTIVE DIRECTOR: RESEARCH

APPENDIX 3: PRE-TESTING OF QUESTIONNAIRE-QUESTIONS

Date: 5 January 2015
Jenny Raubenheimer
Unisa Library
SP5-06

Dear Colleague

Pre-testing of questionnaire

I am currently registered for the degree of Doctor of Philosophy and Literature in the subject of Information Science at the University of South Africa, Pretoria, under the supervision of Professor Patrick Ngulube. The research includes a questionnaire to survey the impact of the respective factors, development strategies and acquired competencies on Library middle management career success.

In order to pre-test the questionnaire, it would be much appreciated if you would complete the attached survey form as well as the following questions on the content and format of the questionnaire. Kindly return it to my e-mail address (raubej@unisa.ac.za) with track and trace changes or to my office in the Library, 5-67 as soon as possible but not later than 21 January 2015. You are invited to feel free to write comments or advice for the improvement on the survey forms itself or to do electronic track and trace changes.

- 1. How long did it take to complete the questionnaire?.....
- 2. Are there important questions to be added to the questionnaire? If yes, please state:.....
- 3. Are there superfluous questions to be omitted? If yes, please list the number of the questions:.....
- 4. Are there any ambiguous questions? If yes, please explain.....
- 5. Do you have any criticisms, comments or suggestions regarding the format? Please advise.....
- 6. Do you have any criticisms, comments or suggestions in general about the questionnaire?
.....
.....
.....

APPENDIX 4: COVER LETTER FOR SURVEY QUESTIONNAIRE

Date: 19 January 2015

Dear Colleagues

Ms Jenny Raubenheimer is at present doing research for a Doctoral qualification on “Developing Library middle management in the context of an Open Distance Learning (ODL) environment.” The research includes a questionnaire to survey the impact of the respective competencies, factors, development strategies on Library middle management career success.

The questionnaire will be sent to you shortly. It would be appreciated if you could complete the questionnaire by 27 January 2015. Your response will be treated in a highly confidential manner in accordance with the University of South Africa policy for the conducting research involving Unisa staff, students and data. A web based questionnaire will be used and as such it will be difficult to identify respondents. The data will be captured by a Unisa statistician who will return it to the researcher for data analysis.

Thank you very much for participating in this survey.

Sincerely,



.....
Patrick Ngulube (PhD)
Professor: Department of Interdisciplinary Research
Unisa School of Graduate Studies

APPENDIX 5: SURVEY QUESTIONNAIRE: LIBRARY MIDDLE MANAGEMENT DEVELOPMENT IN THE CONTEXT OF AN OPEN DISTANCE LEARNING (ODL) ENVIRONMENT IN SOUTH AFRICA

1. INFORMED CONSENT

Note: Words in bold and italics have definitions. If you hover over these words with your mouse pointer, the definitions will be displayed.

Dear Participant,

I am gathering data for a research project in fulfillment of my Ph.D. program at the University of South Africa (UNISA), College of Human Sciences, Department of Information Science, P.O. Box 392, UNISA 0003, UNISA, Preller Street, Muckleneuk Ridge, Pretoria, South Africa.

I have successfully completed and defended my research proposal at UNISA. I received a letter for ethical clearance from the College of Human Sciences Higher degree committee and a Research permission certificate from the Research Subcommittee of the Unisa Research and Innovation Higher Degrees Committee (SRIHDC). This permits me to do research involving Unisa staff.

The following overview of the study is provided:

Title of study:

Developing Library middle management in the context of an Open Distance Learning (ODL) environment.

Purpose of the study:

This study explores and explains what influences the successful career path of Library middle managers in an ODL institution. For the purpose of this study the following two definitions apply: Jobs in middle management vary widely in terms of responsibility. Depending on the size of the company and the number of middle-level managers in the firm, middle managers may supervise only a small group of employees, or they may manage very large groups, such as an entire business location (<http://www.referenceforbusiness.com/management/Log-Mar/Management-Levels.htm#ixzz3KpdEOOSv>). Middle managers can also be those in the levels below top managers, responsible for carrying out the goals set by top management, and who manages at least one subordinate level of managers within the organisation (<http://www.referenceforbusiness.com/management/Log-Mar/Management-Levels.html#ixzz3KpGrMmmT>).

Procedures to be used:

All middle managers responsible for teams in an ODL Library in South Africa are invited to complete this survey with closed and open-ended questions. Since the Unisa Library is the only ODL Library in South Africa, all middle managers are selected to participate, on a voluntary basis, while the responses will be treated as anonymous and confidential.

Potential risks to participants:

There is no apparent risk involved in this study. The research will be conducted in accordance with the University of South Africa's policy for conducting, research involving Unisa staff, students and data. It takes approximately 25 minutes to complete the questionnaire.

Potential benefits of the study:

Competencies, development strategies and *Internal* and *external factors* which were identified in the literature as influences on career path success as well as related matters applicable to Library middle managers who operate in the context of a South African academic library will be explored in an ODL Library to establish their applicability to middle manager success.

Protection of the identity and privacy of the participants:

A Web-based questionnaire will be used and as such it will facilitate respondent anonymity.

Participants are only requested to answer the questions on the instrument. Responses are encrypted so that they are only readable by the researcher. Respect for privacy and identity of participants will be adhered to in accordance with the stipulations in the policy on Research and Ethics (2014) of the University of South Africa.

Participants may withdraw from the study at any time if they so wish.

Please note that this is my personal initiative and not that of the Unisa Library. The information you provide may, however, improve the development initiatives of middle managers of the Unisa Library as an ODL Library. The information will be used for purposes of my PhD which may entail the publication of the thesis, and a number of peer reviewed journal articles and/or conference papers.

In addition to the survey questions, only general biographic details such as age, education, language and details about jobs occupied will be asked. The research data will be analysed upon return of the completed questionnaire to the researcher.

Should you like to receive a summary of the findings of the study please submit your e-mail address to me at raubej@unisa.ac.za.

I thank you in advance for your support.

Jenny Raubenheimer

E-mail : raubej@unisa.ac.za

Telephone: 27 12 4293257

1. Do you consent to participate in the survey?

Please answer the following questions. The open- ended questions can be answered by providing written input in the demarcated space. Closed-ended questions can be answered by marking the appropriate box with a tick

	Example: What is your gender?	
	Female	✓
	Male	
	Prefer not to provide information	

2. DEMOGRAPHIC INFORMATION		
2.	At which Library are you employed?	
	Muckleneuck Library	
	Regional office library or subject library	
	Prefer not to provide information	
3.	How many times did you change jobs prior to this appointment?	
	Number of job changes <input type="text"/>	
4.	What is your gender?	
	Female	
	Male	
	Prefer not to provide information	
5.	What is your age group?	
	20 - 30	
	31 - 40	
	41 – 50	
	51 – 60	
	61+	
	Prefer not to provide information	
6.	What is your home language?	
	Afrikaans	
	English	
	Ndebele	
	Northern Sotho	
	Southern Sotho	

	Swazi	
	Tsonga	
	Tswana	
	Venda	
	Xhosa	
	Zulu	
	Other (please specify)	
3. DEFINING SUCCESS		
7.	Rate the following statements in accordance with their importance when describing success	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	Success relates to a person's advancement in the hierarchy	
	Success relates to respect received by others due to a person's high level of competency	
	Success relates to the positive impact of a person's work on the institution	
	Success relates to work life balanced with a person's home life	
	Success relates to how you perform during an assessment of your annual performance by the line manager	
	Other (please specify)	
8.	To what extent do you think you are successful based on each of the following success statements?	
	<ol style="list-style-type: none"> 1. Most successful 2. Very successful 3. Neither successful / unsuccessful (neutral) 4. Somewhat successful 5. Not at all successful 	
	I am successful because of my advancement in the library's hierarchical structure	
	I am successful because I am respected by others due to my high level of competency	
	I am successful because the work done by me has a positive effect on the institution	
	I am successful because my work life is balanced with my home life	
	I am successful because I receive a high score when assessed by my line manager as part of the Institutional Performance Management System (IPMS)	
	Other (please specify)	
4. SELECTIVE DEVELOPMENT STRATEGIES THAT FACILITATED YOUR APPOINTMENT AS MIDDLE MANAGER		
9.	What formal qualifications do you have? (<i>Please select all that apply</i>)	
	Library diploma	
	Bachelor's degree	
	Bachelor's degree in Library and Information Science (LIS)	
	Formal qualification in Open Distance Learning	
	Bachelor degree and postgraduate Library Diploma	
	Management certificate, diploma, degree	
	Honours degree (LIS)	
	Master degree (LIS)	
	Doctoral degree (LIS)	
	Recognition of prior learning (RPL)	

	Other (please specify)	
10.	Rate the following 6 statements in terms of how important you perceive them to be as contributors to your appointment as middle manager	
	1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant	
	Number of years of work experience	
	Number of years of experience in the ODL Library	
	Number of previous roles performed in different sections of the ODL institution	
	Number of roles performed in other academic libraries	
	Relevance of your work experience to the tasks to be performed in your current position	
	Relevance of your qualification(s) to the tasks to be performed in your current position	
5.	DEVELOPMENT STRATEGIES AND APPROACHES THAT FACILITATED YOUR APPOINTMENT AS MIDDLE MANAGER	
11.	Please select <u>all</u> statements that apply to you	
	When I entered the profession, I aspired to move vertically in the hierarchy/ to become a middle manager	
	I attended management short courses prior to this appointment	
	I was part of the Library's management succession planning	
	I was guided by my career plan	
	My career plan was developed my by line manager	
	I developed my career plan myself	
	My career plan was developed by both me and my line manager	
	I tracked my career progression against this career plan	
	My line manager tracked my progression against this career plan	
	Prior to my appointment to middle management, I performed <i>secondary leadership roles</i>	
	I networked with or within professional organisations such as LIASA or NADEOSA	
	Prior to my appointment as middle manager, I had a mentor	
	I encountered obstacles in my progression to become a middle manager	
	Please specify the obstacles	
6.	INFLUENCE OF SELECTIVE EXTERNAL FACTORS	
12.	Rate how important you perceive the following selective factors have been in your advancement to be appointed to a middle manager position	
	1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant	
	Luck / serendipity	
	Family support	
	Gender	
	Age	
	<i>Geographical mobility</i>	
	Employment Equity policy in general	
	Other (please specify)	
7.	DEVELOPMENT NEEDS OF ODL LIBRARY MIDDLE MANAGER AFTER APPOINTMENT	
13.	Rate how important you perceive the following statements are in terms of performing your duties as middle manager	

	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	An understanding of developments in the Library and Information service environment	
	An understanding of the operations of ODL Library services	
	An understanding of the ODL Library <i>strategic plan</i>	
	An understanding or <i>management activities</i> to supervise or manage teams effectively	
	An understanding of practising <i>knowledge management</i> in an ODL Library	
	An understanding of performing the <i>decision making role</i> in the ODL Library	
	An understanding of performing the <i>interpersonal role</i> in the ODL Library	
	An understanding of performing the <i>information role</i> in the ODL Library	

14.	Rate how important you perceive the following continuing development strategies are for you after your appointment as middle manager	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	Formal undergraduate <i>library qualifications</i>	
	Formal graduate <i>library qualifications</i>	
	ODL Library experience	
	<i>Professional networking</i>	
	<i>Management training</i>	
	IT skills Training	
	<i>ODL Networking</i>	
	<i>Training in knowledge management</i>	
	<i>Coaching</i>	
	Being <i>mentored</i>	
	Serving as <i>mentor</i>	
	<i>Career plan</i>	
	Participation in special projects	
	<i>Action learning</i>	
	<i>Talent management</i>	
	<i>Counselling</i>	
	<i>360 degree assessment</i>	
	<i>Knowledge management training</i>	
	<i>Leadership development</i>	
	<i>Recognition of prior learning (RPL)</i>	
	Other (please specify)	
8.	DEVELOPMENT NEEDS OF ODL LIBRARY MIDDLE MANAGER AFTER APPOINTMENT II	
15.	To what extent do you think you use the development strategies successfully?	
	<ol style="list-style-type: none"> 1. Most successful 2. Very successful 3. Neither successful / unsuccessful (neutral) 4. Somewhat successful 5. Not at all successful 	
	Formal under graduate <i>library qualifications</i>	
	Formal post graduate <i>library qualifications</i>	

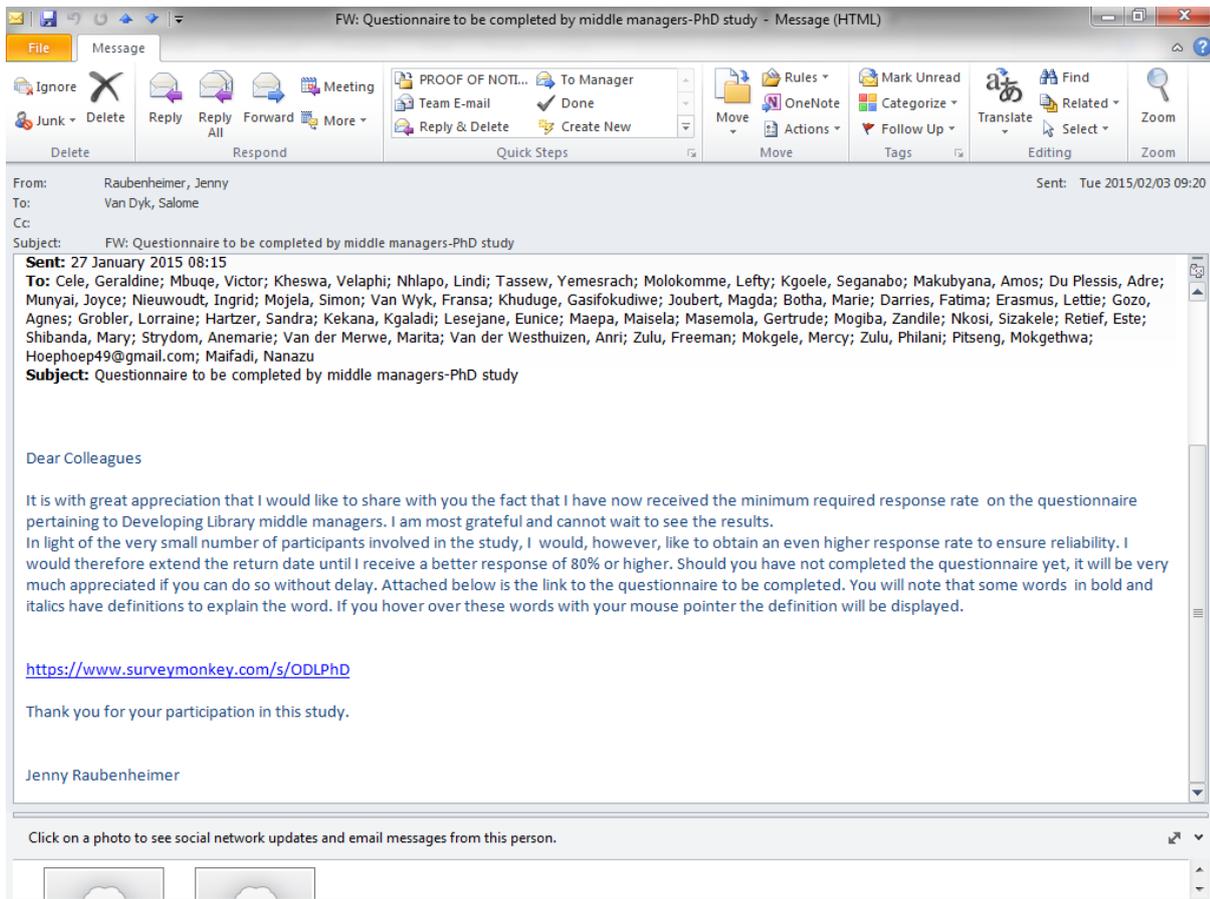
	ODL Library experience	
	<i>Professional networking</i>	
	<i>Management training</i>	
	IT skills training	
	<i>ODL Networking</i>	
	<i>Training in knowledge management</i>	
	<i>Coaching</i>	
	<i>Being mentored</i>	
	<i>Serving as mentor</i>	
	<i>Career plan</i>	
	Participation in special projects	
	<i>Action learning</i>	
	<i>Talent management</i>	
	<i>Counselling</i>	
	<i>360 degree assessment</i>	
	<i>Knowledge management training</i>	
	<i>Leadership development</i>	
	<i>Recognition of prior learning (RPL)</i>	
9. FACTORS THAT INFLUENCE SUCCESS OF ODL LIBRARY MIDDLE MANAGER AFTER APPOINTMENT		
16.	Rate how important you perceive the following selective factors were in performing your duties as middle manager after your appointment to a middle manager position	
	1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant	
	<i>Ability</i>	
	Flexibility	
	Communication	
	Determination	
	Hard work	
	Intelligence	
	Enjoyment	
	Other (please specify)	
10. KEY MANAGERIAL COMPETENCIES		
17.	How <u>important</u> do you perceive COMMUNICATION to be as a managerial competency?	
	1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant	
	The ability to communicate in a flexible way with staff from diverse background in order to obtain a wide spectrum of possible options/solution on a particular issue	
	The ability to communicate openly and honestly with staff when providing feedback on their performance / achieved outputs	
	The ability to share knowledge that keeps people up to date on relevant events and activities	
	The ability to deliver presentations on relevant issues with confidence at higher level management meetings	
	The ability to develop social networks (for example, Web 2)	
	The ability to develop 'communities of practice' (for example, Facebook or Twitter) to promote formal / informal communication	

	The ability to comfortably exercise managerial power on all level: upwards with senior, laterally with peers and downward with subordinates	
18.	How <u>important</u> do you perceive PLANNING AND ADMINISTRATION to be as a managerial competency?	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	The ability to monitor information with the intent of using the accumulated knowledge to guide future decisions	
	The ability to use digital software to create institutional knowledge repositories	
	The ability to take calculated risks with associated anticipated consequences	
	The ability to translate the institution's vision and goals into achievable objectives / actions	
	The ability to prioritise resource allocation to meet objectives of the project	
	The ability to multitask	
	The ability to utilise information based on an understanding of financial reports	
19.	How <u>important</u> do you perceive TEAMWORK to be as a managerial competency?	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	The ability to compile efficient task teams based on skills-abilities	
	The ability to compile efficient task teams based on perspective-diversity	
	The ability to set staff development goals that promote ODL librarianship	
	The ability to create quality monitoring systems that assess team performance for team-reward purposes	
	The ability to support task-teams through coaching mentoring and counselling to ensure adherence to ODL standard of service delivery	
	The ability to convey ideas understandably to evoke desired actions	
	The ability to apply knowledge of staff to ensure goal achievements	
	The ability to implement conflict resolution effectively in teams with the purpose of bolstering / promoting team morale	
20.	How <u>important</u> do you perceive STRATEGIC ACTION to be as a managerial competency?	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	The ability to exhibit professional ODL librarian-leadership based on an understanding of the LIS environment	
	The ability to keep abreast with the initiatives of ODL partners and /or competitors	
	The ability to analyse the implications of current LIS trends	
	The ability to fit into the corporate culture of the ODL organisation	
	The ability to understand the structures of the ODL organisation	
	The ability to understand the competencies of the ODL organisation	
	The ability to prioritise tactical operational goals that promote strategy-implementation	
	The ability to use the organisation's knowledge based assets to derive knowledge / findings that inform critical issues of the organisation	
	The ability to encourage innovative new ideas which include technologies to be	

	used in support of ODL service delivery	
	The ability to market and publicise information products and services applicable to the ODL environment	
21.	How important do you perceive GLOBALISATION to be as a managerial competency?	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	The ability to recognise the impact of global events on the ODL organisation, for example political social and economic trends	
	The ability to travel to countries where the ODL Library has an interest	
	The ability to obtain a basic business vocabulary relevant to own job in the language where the ODL organisation has business interests outside the borders of South Africa	
	The ability to be sensitive to cultural cues which ensures easy adaptation in novel situations	
	The ability to avoid stereotyping by recognising variation in culture	
	The ability to understand how own cultural background affects own attitudes and behaviours	
22.	How important do you perceive EMOTIONAL INTELLIGENCE AND SELF MANAGEMENT to be as a managerial competency?	
	<ol style="list-style-type: none"> 1. Critically important 2. Important 3. Neither important / unimportant (neutral) 4. Not important 5. Irrelevant 	
	The ability to foster a sense of self-worth and capabilities	
	The ability to seek opportunities for my own personal growth to achieve my personal goals	
	The ability to keep clear personal standards that serve as basis for maintaining integrity and ethical conduct even in the case of strong pressure to the contrary	
	The ability to maintain standards of honesty (not only telling people what they want to hear)	
	The ability to ensure one's own personal objectives are met with respect to personal growth	
	The ability to strike a balance between work-life and private-life activities	
	The ability to persevere when there are obstacles	
	The ability to take a personal interest in the concern of <i>others</i>	
	The ability to remain confident when resolving a disagreement	
	The ability to apply different leadership styles as the situation requires	
	The ability to establish a Learning environment through knowledge sharing	
23.	What other <u>important</u> competencies or skills would you advise ODL Library middle managers to develop?	
11. ACHIEVEMENT OF KEY MANAGEMENT COMPETENCIES		
24.	How <u>successful</u> are you in performing the following managerial competencies?	
	<ol style="list-style-type: none"> 1. Most successful 2. Very successful 3. Neither successful / unsuccessful (neutral) 4. Somewhat successful 5. Not at all successful 	
	Communication	
	Planning and Administration	

	Teamwork	
	Strategic action	
	Globalisation	
	Emotional intelligence and self-management	

APPENDIX 6: QUESTIONNAIRE FOLLOW UP



The screenshot shows an Outlook email window titled "FW: Questionnaire to be completed by middle managers-PhD study - Message (HTML)". The interface includes a ribbon with "File" and "Message" tabs, and various action buttons like "Ignore", "Delete", "Reply", "Forward", "Meeting", "PROOF OF NOTI...", "To Manager", "Rules", "Mark Unread", "Find", "Junk", "Delete", "Reply All", "Respond", "Team E-mail", "Done", "Move", "OneNote", "Categorize", "Translate", "Related", "Zoom", "Reply & Delete", "Create New", "Actions", "Follow Up", "Select", and "Zoom".

From: Raubenheimer, Jenny
To: Van Dyk, Salome
Sent: Tue 2015/02/03 09:20
Cc:
Subject: FW: Questionnaire to be completed by middle managers-PhD study

Sent: 27 January 2015 08:15
To: Cele, Geraldine; Mbuqe, Victor; Kheswa, Velaphi; Nhlapo, Lindi; Tassew, Yemesrach; Molokomme, Lefty; Kgoele, Seganabo; Makubyana, Amos; Du Plessis, Adre; Munyai, Joyce; Nieuwoudt, Ingrid; Mojela, Simon; Van Wyk, Frans; Khuduge, Gasifokudiwe; Joubert, Magda; Botha, Marie; Darries, Fatima; Erasmus, Lettie; Gozo, Agnes; Grobler, Lorraine; Hartzler, Sandra; Kekana, Kgaladi; Lesejane, Eunice; Maepa, Maisela; Masemola, Gertrude; Mogiba, Zandile; Nkosi, Sizakele; Retief, Este; Shibanda, Mary; Strydom, Anemarie; Van der Merwe, Marita; Van der Westhuizen, Anri; Zulu, Freeman; Mokgele, Mercy; Zulu, Philani; Pitseng, Mokgethwa; Hoephoep49@gmail.com; Maifadi, Nanazu
Subject: Questionnaire to be completed by middle managers-PhD study

Dear Colleagues

It is with great appreciation that I would like to share with you the fact that I have now received the minimum required response rate on the questionnaire pertaining to Developing Library middle managers. I am most grateful and cannot wait to see the results. In light of the very small number of participants involved in the study, I would, however, like to obtain an even higher response rate to ensure reliability. I would therefore extend the return date until I receive a better response of 80% or higher. Should you have not completed the questionnaire yet, it will be very much appreciated if you can do so without delay. Attached below is the link to the questionnaire to be completed. You will note that some words in bold and italics have definitions to explain the word. If you hover over these words with your mouse pointer the definition will be displayed.

<https://www.surveymonkey.com/s/ODLPHD>

Thank you for your participation in this study.

Jenny Raubenheimer

Click on a photo to see social network updates and email messages from this person.

APPENDIX 7: APPROVAL TO CONDUCT INTERVIEWS



RESEARCH PERMISSION SUB-COMMITTEE OF SRIHDC

22 May 2015

Dear Mrs Jenny Raubenheimer,

Decision: Research Permission
Approval for the period May 2015 to
31 December 2015

Ref #: 2015_RPSC_041
Mrs Jenny Raubenheimer
Student #: 32759207
Staff #:

Principal Investigator:

Mrs Jenny Raubenheimer
Department of Information Science
School of Arts
College of Human Sciences
UNISA
raubej@unisa.ac.za
(012) 429-3257/079 494 8472

Supervisor: Prof Patrick Ngulube
ngulup@unisa.ac.za
(012) 429-2832

A study titled: "Developing Library middle management in the context of knowledge management in an ODL environment."

Your application regarding permission to conduct research involving UNISA staff and data in respect of the above study has been received and was considered by the Research Permission Subcommittee (RPSC) of the UNISA Senate Research and Innovation and Higher Degrees Committee (SRIHDC) on 15 May 2015.

It is my pleasure to inform you that permission has been granted for the study to:

1. Access and use the published and unpublished UNISA documents as outlined in the application form.
2. Distribute a web-based survey to Library middle management.
3. Conduct interviews with certain selected members of the Library middle management.



University of South Africa
Pretter Street, Muckleneuk Ridge, City of Tshwane
PO Box 382 UNISA 0003 South Africa
Telephone +27 12 429 3111 Facsimile +27 12 429 4151
www.unisa.ac.za

The researcher needs to make it explicitly clear to the prospective participants that although a work relationship exists between the researcher and them, their participation in the study is entirely voluntary and un-coerced.

You are requested to submit a report of the study to the Research Permission Subcommittee (RPSC@unisa.ac.za) within 12 months of completion of the study.

Note:

The personal (and institutional) information made available to the researcher(s)/gatekeeper(s) will only be used for the advancement of this research project as indicated and for the purpose as described in this permission letter. The researcher(s)/gatekeeper(s) must take all appropriate precautionary measures to protect the personal information given to him/her/them in good faith and it must not be passed on to third parties.

The reference number 2015_RPSC_041 should be clearly indicated on all forms of communication with the intended research participants and the Research Permission Subcommittee.

We would like to wish you well in your research undertaking.

Kind regards,



PROF L LABUSCHAGNE
EXECUTIVE DIRECTOR: RESEARCH

Tel: +27 12 429 6368 / 2446

Email: lbus@unisa.ac.za



University of South Africa
Preller Street, Muckleneuk Ridge, City of Tshwane
PO Box 392 UNISA 0003 South Africa
Telephone: +27 12 429 3111 Facsimile: +27 12 429 4150
www.unisa.ac.za

APPENDIX 8: INFORMED CONSENT: INTERVIEWS QUALITATIVE DATA COLLECTION QUESTIONS

LIBRARY MIDDLE MANAGEMENT DEVELOPMENT IN THE CONTEXT OF AN OPEN DISTANCE LEARNING (ODL) ENVIRONMENT

Dear Participant,

I am gathering data for a research project in fulfillment of my Ph.D. program at the University of South Africa (UNISA), College of Human Sciences, Department of Information Science, P.O. Box 392, UNISA 0003, UNISA-Campus, Preller Street, Muckleneuk Ridge, Pretoria, South Africa. My supervisor is Professor Patrick Ngulube.

I have successfully completed and defended my research proposal at UNISA. I received a letter for ethical clearance from the College of Human Sciences Higher Degrees Committee, and a research permission certificate from the Research Subcommittee of the Unisa Research and Innovation Higher Degrees Committee (SRIHDC). Being granted the ethical clearance and the research permission certificate the researcher is permitted to do research involving Unisa staff within the University research framework.

The following overview of the study is provided.

Title of study:

Developing Library middle management in the context of an Open Distance Learning (ODL) environment

Purpose of the study:

The aim of the study is to explore and explain what influences the successful career path of Library middle managers in an ODL institution. For the purpose of this study, the following two definitions pertaining to middle management apply:

Jobs in middle management vary widely in terms of responsibility. Depending on the size of the company and the number of middle level managers in the firm, middle managers may supervise only a small group of employees, or they may manage very large groups, such as an entire business location (Business Reference 2015:1). Middle managers can also be those in the levels below top managers, responsible for carrying out the goals set by top management, and who manage at least one subordinate level of managers, and reports to a higher level of managers within the organisation (Business Reference 2015:1).

Procedures to be used:

Middle managers with experience in the ODL Library, responsible for teams and who operate on different layers in the structure of the ODL Library are invited to participate in the interviews. Middle managers are selected to participate, on a voluntary basis, while the responses will be treated as confidential. An interview protocol was designed and includes questions to be asked during the interview. The protocol will contain instructions for the interviewer to follow so that standard procedures are followed from one interview to another. The questions will be limited to no more than eight questions, developed as part of the interview protocol, to guide the interview.

Potential risks to participants:

There is no apparent risk involved in this study. The research will be conducted in accordance with the University of South Africa's policy for the conducting research involving Unisa staff, students and data. The interview will take no more than two hours.

Potential benefits of the study:

Responses to questions on competencies, development strategies and factors*1) and *2), will be discussed during an interview in order to determine why and how these facilitate the middle manager's career path. Responses to these questions can be considered when planning to develop middle managers of an ODL Library.

Protection of the identity and privacy of the participants:

Information from interviews will be recorded by making handwritten notes and/ or audiotaping. Respect for privacy and identity of participants will be adhered to in accordance with the stipulations in the Policy on Research and Ethics (2014) of the University of South Africa. Participants are requested to answer only questions relating to the study. The recorded answers to questions posed during the qualitative interview will be secured in a data base for the purpose of this study only. The recordings will be shared with participants after the interview as participants will be asked to check the transcripts for accuracy.

Participation is voluntary and participants may withdraw from the study if they so wish.

Please note that this is my personal initiative and not that of the Unisa Library. The information you provide may, however, improve the development initiatives of middle managers of the Unisa Library as an ODL Library. The information will be used for purposes of my Ph.D. which may entail the publication of the thesis, and a number of peer reviewed journal articles and/or conference papers.

In addition to the questions, only general biographic details such as name of the interviewee, interviewee position and years of working experience will be recorded.

The research data will be transcribed by an external company. It will be analysed by the researcher and cross checked by an external person by means of an inter-coder agreement, to ensure that there is no drift in definition of codes.

Should you like to receive a summary of the findings of the study, please submit your e-mail address to me at raubej@unisa.ac.za

I thank you in advance for your support.

Do you consent to participate in the interview?

YES

NO

Jenny Raubenheimer

E-mail: raubej@unisa.ac.za

Telephone: 27 12 4293257

Note*1) Internal factors meaning innate or developed

*2) External factors are those over which people have little or no control with regard to influence on career success

APPENDIX 9: INFORMED CONSENT-RECORDING THE INTERVIEW

INFORMED CONSENT: INTERVIEWS USE OF TAPE RECORDER-QUALITATIVE DATA COLLECTION QUESTIONS LIBRARY MIDDLE MANAGEMENT DEVELOPMENT IN THE CONTEXT OF AN OPEN DISTANCE LEARNING (ODL) ENVIRONMENT

Dear Participant,

I am gathering data for a research project in fulfillment of my Ph.D. program at the University of South Africa (UNISA), College of Human Sciences, Department of Information Science, P.O. Box 392, UNISA 0003, UNISA-Campus, Preller Street, Muckleneuk Ridge, Pretoria, South Africa. My promoter is Prof P Ngulube.

I have successfully completed and defended my research proposal at UNISA. I received a letter for ethical clearance from the College of Human Sciences Higher degree committee and a Research permission certificate from the Research Subcommittee of the Unisa Research and Innovation Higher Degrees Committee (SRIHDC). This permits me to do research involving Unisa staff. The following overview of the study is provided.

Title of study:

Developing Library middle management in the context of an Open Distance Learning (ODL) environment

Purpose of the study:

The aim of the study is to explore and explain what influences the successful career path of Library middle managers in an ODL institution. For the purpose of this study, the following two definitions pertaining to middle management apply.

Jobs in middle management vary widely in terms of responsibility. Depending on the size of the company and the number of middle level managers in the firm, middle managers may supervise only a small group of employees, or they may manage very large groups, such as an entire business location (Reference for business 2015:1). Middle managers can also be those in the levels below top managers, responsible for carrying out the goals set by top management, and who manage at least one subordinate level of managers, and reports to a higher level of managers within the organisation (Reference for business 2015:1).

Procedures to be used:

Middle managers with experience in the ODL Library, responsible for teams and who operate on different layers in the structure of the ODL Library are invited to participate in the interviews. Middle managers are selected to participate, on a voluntary basis, while the responses will be treated as confidential. An interview protocol was designed and includes questions to be asked during the interview. The protocol will contain instructions for the interviewer to follow so that standard procedures are followed from one interview to another. The questions will be limited to no more than eight questions, developed as part of the interview protocol, to guide the interview.

Potential risks to participants:

There is no apparent risk involved in this study. The research will be conducted in accordance with the University of South Africa's policy for the conducting research involving Unisa staff, students and data. The interview will take no more than two hours.

Potential benefits of the study:

Responses to questions on competencies, development strategies and factors*1) and *2), posed in

a survey questionnaire, will be discussed in order to determine why and how these facilitate the middle manager's career path. Responses to these questions can be considered when planning to develop middle managers of an ODL Library.

Protection of the identity and privacy of the participants:

Information from interviews will be recorded by making handwritten notes and/ or audiotaping. Respect for privacy and identity of participants will be adhered to in accordance with the stipulations in the policy on Research and Ethics (2007) of the University of South Africa. Participants are requested to answer only the questions on the interview protocol. The recorded answers to questions posed during the qualitative interview will be secured in a data base for the purpose of this study only.

Participants may withdraw from the study if they so wish.

Please note that this is my personal initiative and not that of the Unisa Library. The information you provide may, however, improve the development initiatives of middle managers of the Unisa Library as an ODL Library. The information will be used for purposes of my PhD which may entail the publication of the thesis, and a number of peer reviewed journal articles and/or conference papers.

In addition to the questions, only general biographic details such as name of the interviewee, interviewee position and years of working experience will be recorded.

The research data will be analysed upon return of the completed questionnaire to the researcher. Should you like to receive a summary of the findings of the study, please submit your e-mail address to me at raubej@unisa.ac.za

I thank you in advance for your support.

Do you consent to the recording of the interview?

 YES NO

Signature of participant:.....

Jenny Raubenheimer

E-mail: raubej@unisa.ac.za

Telephone: 27 12 4293257

Note*1) Internal factors meaning innate or developed

*2) External factors are those over which people have little or no control with regard to influence on career success

APPENDIX 10: COVER LETTER SENT OUT BEFORE INTERVIEWS

Date: 17 June 2015

Dear Colleague

Ms Jenny Raubenheimer is at present doing research for a Doctoral qualification on “Developing Library middle management in the context of an Open Distance Learning (ODL) environment.” She has completed research in this regard which provided quantitative data that was collected through a survey questionnaire. This provided insight to the importance of the respective competencies, factors and development strategies on ODL Library middle management career success. As part of the process to collect qualitative data, interviews will now be held with ODL Library middle managers. These middle managers were selected mainly because the researcher felt convinced that they would be able to respond to certain questions in terms of their experience in the Library. It would be appreciated if you could participate in an interview with Ms Raubenheimer to be scheduled by her. Your response will be treated in a highly confidential manner in accordance with the University of South Africa Policy on Research Ethics; and the Policy for conducting research involving Unisa staff, students and data. The data will be stored in a secure manner and be used for the purpose of this research study only.

Thank you very much for participating in the interview.

Sincerely,



.....
Patrick Ngulube (PhD)
Professor: Department of Interdisciplinary Research
Unisa School of Graduate Studies

APPENDIX 11: ODL LIBRARY INTERVIEW PROTOCOL

Date:

Time of interview:

Place:

Interviewer:

Interviewee:

Interviewee position:

Interviewee years of working experience:

Description of project:

Investigating middle management development practices in the ODL library

Purpose of the questions: To gain clarity on findings in the quantitative study

Questions:

1. 1. What do ODL Library middle managers understand development to mean? (Ice breaker question)

2. Five questions to gain clarity

1. Success: Why does success relate primarily to the manager's impact on the institution?

1a How can it be implemented to ensure that the person perform successfully in terms of this criterion?

2. Development factors:

2a. Development factors: How do you explain the fact that external factors (gender/ age/employment equity luck(serendipity) are being perceived as less relevant to the appointment of ODL Library middle managers while internal factors pertaining to ability/ communication / hard work /determination are rated very important to optimise the career path of ODL Library middle managers. Why did 'family support' rate high as an external factor?

2b. Development strategies: How would ODL career development strategies help ODL Library middle managers to optimise the career path?

3. Understanding the LIS/ ODL/ Strategic environment: How would you explain the importance of these strategies?

a. How do you explain the fact that some ODL Library managers put a higher premium on understanding the LIS environment /and understanding management activities than understanding of the strategic plan?

4. How can ODL Library middle managers who aspire to be appointed to a higher position in the hierarchy be enabled to perform a management role with strategic impact?

5. Competencies: On your level of operating as an ODL Library middle manager, what competencies are required to contribute to the ODL Library's competitive edge? How could they be practised?

5a. Why did strategic action competency and globalisation competency rate lower than the managerial competencies?

Notes: Instruction for interviewer:

1. Start with ice breaker question.
2. Probe the questions, to follow up and explain their ideas in detail, or to elaborate on what was said.
3. Space between the questions to record responses.
4. Concluding statement after questions: Who should I visit to learn more about my questions?
5. A final thank you statement to acknowledge the time spent on the interview.
6. Develop a log to record documents collected for analysis in a qualitative study. Note in this log whether information represents primary material (information directly from participants) or secondary material (second hand accounts written by others. Comment on the reliability of the data sources.

Recommended Institutional documents:

Open distance learning policy

Policy on the recruitment, selection, appointment and related matters for permanent employees on levels P5 to P18

Recognition of prior learning (RPL) policy

Talent management policy

Unisa: Guidelines for education, training and development

Unisa Institutional performance management: performance agreement for managers

Unisa Institutional statistics

Unisa management and leadership development strategy: "Building Unisa's Future Leaders

Unisa 2015 Strategic Plan

Unisa 2013-2015: Towards a High Performance University

Adapted from guidelines provided by Creswell (2014:194).

APPENDIX 12: PRE-TESTING OF INTERVIEW QUESTIONS

Date: 15 June 2015
Unisa Library
SP5-06

Dear Colleague

Pre-testing questions in the Interview protocol

I am currently registered for the degree of Doctor of Philosophy and Literature in the subject of Information Science at the University of South Africa, Pretoria, under the supervision of Professor Patrick Ngulube. The research includes a questionnaire to survey the impact of the respective factors, development strategies and acquired competencies on Library middle management career success and also interviews to be held to collect qualitative data flowing from the questionnaire responses.

In order to pre-test the interview protocol, it would be much appreciated if you would participate in an interview and respond to how the questions raised during the interview can be improved. You were selected to participate in the pre-testing of the questions to be raised during the interviews because of your vast experience as manager in the relevant ODL Library.

Should you agree to participate in the pre-testing, an interview will be scheduled shortly by the researcher. As the interview will be recorded it will be appreciated if the attached consent form can be signed and returned before the pre-testing interview can be held.

Thank you for participating in the pre-testing of the interview questions.

Signed: Jenny Raubenheimer
PhD student 32759207: Department of Information Science
University of South Africa

APPENDIX 13:

FRAMEWORK FOR ODL LIBRARY MIDDLE MANAGEMENT DEVELOPMENT

The framework contains three parts, namely a summary of the facilitators of ODL Library middle management career success; recommendations based on the needs of ODL Library middle managers; and a summary of correlations relating to career advancement.

PART 1: FACILITATORS OF ODL LIBRARY MIDDLE MANAGEMENT CAREER SUCCESS

Table 33: Framework for ODL Library Middle Management Development

ODL LIBRARY MIDDLE MANAGEMENT DEVELOPMENT		
<ul style="list-style-type: none"> Relevance legend: <p>*i)= significant/critically important rated facilitator of ODL Library career success according to quantitative results;</p> <p>*ii)=insignificant contributor to ODL Library career success according to quantitative or qualitative findings</p> <ul style="list-style-type: none"> Explanation legend: <p>Order of importance of facilitator of career success to be included in personal development plan (measured quantitative results)</p>		
1. Success Criteria		
These criteria relate to the success-experience of ODL Library middle managers		
Criteria	Relevance	Explanation*
Positive impact of the person's work on the institution	*i)	Quantitative results relating to critically important ratings which indicate the premium on success criteria placed by ODL Library middle managers in general, listed according to critical importance. Most successful use in meeting own success is indicated in brackets after the importance rating. 64.71%; (48.57%)
Work life balance with person's home life	*i)	48.57%;(27.78%)
Respect received by others due to high level of competency	*i)	33.33%:(20%)
IPMS performance	*ii)	20%: (2.86%)
Advancement in hierarchy	*ii)	14.29%; (2.86%)
2. Facilitators of ODL Library middle managers' appointment		
These are external development factors, development strategies and development approaches that facilitate the appointment of ODL Library middle managers		
External factors These are factors that ODL Library middle managers have little or no control over.	Relevance	Explanation*
Family support	*i)	Quantitative results relating to critically important ratings by ODL Library middle managers, listed according to critically important ratings 20.00%
Employment equity	*ii)	9.09%
Geographic mobility	*ii)	3.23%
Gender	*ii)	3.03%
Age	*ii)	3.03%

Luck/serendipity;	*ii)	0.00%
Development strategies These pertain to experience gained and qualifications obtained prior to middle managers' appointment.	Relevance	Explanation* Quantitative results relating to critically important ratings by ODL Library middle managers, listed according to order of importance.
Experience	i)	Critically important experience relating to the current position is work experience (33.33%); experience gained in other academic libraries (33.33%); ODL Library experience including role performed in other ODL sections (27.78%).
Qualifications	*i)	Frequency rating of qualifications obtained. The highest frequency of obtained qualifications by ODL Library middle managers: Honours degree in LIS (32.79%); Bachelor degree (14.75%); Bachelor degree and postgraduate degree in LIS (14.75% and 6.56% respectively).
Development approaches These are frequent approaches applied by ODL Library middle managers in support of an appointment.	Relevance	Critically important ratings relating to development approaches that facilitate a successful appointment
ODL Library manager developed a career plan	*i)	18.12%
Performed secondary leadership roles	*i)	15.63%
Attended management short courses	*i)	13.12%
Aspired to move vertically	*i)	12.5%
Networking in the profession (LIASA; NADEOSA)	*i)	11.25%
Being mentored	ii)	4.37%
ODL Library manager tracked progression against career plan	*ii)	6.88%
Obstacles experienced in being appointed	*ii)	4.37%
Part of succession planning	*ii)	1.88%
Line manager tracked progression	*ii)	0%
3. Facilitators of ODL Library middle managers' optimal career path		
These are internal development factors, development needs to perform the role of ODL Library middle manager and development strategies that facilitate an optimal career path for ODL Library middle managers		
Internal development factors These are selective factors which are innate or developed.	Relevance	Explanation* Critically important ratings relating to internal development factors that facilitate a successful career path.
Ability	*i)	80.56%
Communication	*i)	75%
Hard work	*i)	75%
Determination	*i)	72.22%
Enjoyment	*i)	51.43%
Flexibility	*i)	50%
Intelligence	*i)	42.86%
Development needs These are critically important needs of ODL Library middle managers to facilitate an	Relevance	Explanation* Critically important ratings relating to development needs to be addressed in order to facilitate a successful career path for ODL Library middle

optimal career path		managers
Understanding the development of the Library's service environment	*i)	72.22%
Understanding management activities	*i)	72.22%
Understanding the ODL Library's strategic plan	*i)	61.11%
Understanding ODL Library's services	*i)	50%
Understanding ODL operations	*i)	50%
Understanding ODL knowledge management practices	*i)	31.43%
Understanding the management role: <ul style="list-style-type: none"> Decision making role Interpersonal role Informational role 	*i)	47.22% 47.22% 36.11%
Development strategies These are critically important development career strategies that facilitate an optimal career path for ODL Library middle managers.	Relevance	Explanation* Critically important ratings relating to development strategies that facilitate a successful career path. Most successful use of strategies is indicated in brackets after the most important rating.
<ul style="list-style-type: none"> Management training-short courses 	*i)	47.22% (25.71%)
<ul style="list-style-type: none"> Leadership development 	*i)	41.67% (27.78%)
<ul style="list-style-type: none"> Formal postgraduate library qualifications 	*i)	36.11% (26.47%)
<ul style="list-style-type: none"> IT Skills training 	*i)	33.33% (20%)
<ul style="list-style-type: none"> Formal undergraduate library qualifications 	*i)	30.30% (20.59%)
<ul style="list-style-type: none"> Participation in special projects 	*i)	26.47% (27.8%)
<ul style="list-style-type: none"> Professional networking 	*i)	25.71% (19.44%)
<ul style="list-style-type: none"> Being mentored 	*i)	25% (11.43%)
<ul style="list-style-type: none"> ODL Library experience 	*i)	22.22% (8.33%)
<ul style="list-style-type: none"> 360 degrees assessment 	*i)	21.21% (6.06%)
<ul style="list-style-type: none"> Talent management 	*i)	20% (5.71%)
<ul style="list-style-type: none"> Career plan 	*i)	17.65% (6.06%)
<ul style="list-style-type: none"> Recognition of prior learning 	*i)	17.14% (8.82%)
<ul style="list-style-type: none"> Coaching 	*i)	16.67% (11.76%)
<ul style="list-style-type: none"> Training in knowledge management 	*i)	11.43% (5.71%)
<ul style="list-style-type: none"> Serving as a mentor 	*i)	11.43% (11.43%)
<ul style="list-style-type: none"> Action learning 	*i)	11.43% (17.14%)
<ul style="list-style-type: none"> ODL networking 	*i)	11.11% for each of the two strategies Use:8.82%;6.25%
<ul style="list-style-type: none"> .Counselling 	*ii)	8.57% (8.57%)

4. Facilitators of ODL Library middle managers' optimal career path: Competencies		
These are six selected competencies based on management theories that facilitate an optimal career path for ODL Library middle managers, listed in the order of importance.		
Competency	Relevance	Explanation*
		<p>Critically important ratings relating to competencies that facilitate a successful career path</p> <p>This is followed by a listing of the personal success accomplished through the most successful use of the six selected competencies.</p>
Planning and Administration	*i)	<ul style="list-style-type: none"> • Prioritise resource allocation to projects (77.78%) • Translate vision/goals to objectives/actions (75%) • Monitor information, guide future decisions (72.22%) • Multitask (69.44%) • Take calculated risks, with consequences (52.78%) • Use information based financial reports (44.44%) • Use digital software for knowledge repositories (38.89%)
Emotional intelligence and Self-management	*i)	<ul style="list-style-type: none"> • Set standards of honesty (80.56%) • Good personal standards, for integrity and ethical conduct (72.22%) • Persevere even when obstacles are present (66.67%) • Obtain balance, work/life (63.89%) • Remain confident when resolving disagreement (63.89%) • Apply different leader-styles, situation-dependent (61.11%) • Foster sense of self-worth and capabilities (58.33%) • Establish, learning environment via knowledge sharing (55.56%) • See opportunities, own growth towards personal goals (50%) • Meet personal objectives re personal growth (50%) • Take a personal interest in concerns of others (41.67%).
Communication	*i)	<ul style="list-style-type: none"> • Communicate, flexible way for possible solutions (80.56%) • Communicate openly and honestly, feedback, performance (80.56%) • Share knowledge, keep people up to date (75%) • Comfortably exercise managerial power (66.67%) • Deliver presentations, higher management meetings (58.33%) • Develop communities of practice (for example, Facebook or Twitter (25.71%) • Develop social networks (for example Web 2) (25%)
Teamwork	*i)	<ul style="list-style-type: none"> • Implement conflict resolution effectively (75%) • Compile efficient task teams, skills-abilities (58.33%) • Apply staff knowledge to ensure goal achievement (58.33%)

		<ul style="list-style-type: none"> • Create quality monitoring systems for team-rewards (58.33%) • Convey ideas understandably to evoke desired actions (55.56%) • Support task teams, coach, mentor, quality service delivery (52.78%) • Set development goals; promote ODL librarianship (44.44%) • Compile efficient task teams, perspective-diversity (27.78%)
Strategic action	*i)	<ul style="list-style-type: none"> • Encourage innovative new ideas (63.89%) • Analyse the implications of current LIS trends (52.78%) • Use organisational knowledge assets, inform critical issues (50%) • Prioritise operational goals, promote implement strategy (47.22%) • Keep abreast initiatives ODL partners/competitors (44.44%) • Exhibit professional ODL leadership based LIS insight (41.67%) • Understand structures of the ODL organisation (41.67%) • Understand the competencies of ODL organisation (41.67%) • Market information products, services of ODL environment (38.89%) • Fit into corporate culture of ODL organisation (33.33%)
Globalisation	*ii)	<ul style="list-style-type: none"> • Obtain basic business vocabulary, interests outside South Africa (52.78%) • Travel to countries, ODL Library interests (44.44%) • Recognise impact, global events on the ODL organisation (41.67%) • Avoid stereo typing, recognise culture-variation (41.67%) • Insight, cultural background, attitudes (41.67%) • Being sensitive to cultural cues, adapt in novel situations (33.33%)
Importance of competencies		<p>Frequencies of critically important ratings for the different competencies:</p> <p>Planning and Administration (61.51%) Emotional intelligence (60.35%) Communication (58.96%) Teamwork (53.38%) Strategic thinking (45.56%) Globalisation (42.59%)</p>
Use of competencies	*ii)	<p>Most successfully used competencies are listed from the highest to the lowest use:</p> <p>Teamwork (47.22%) Planning and administration (38.89%) Emotional intelligence and self-management (36.11%) Communication (33.33%) Strategic action (30.56%) Globalisation (8.33%)</p>

PART 2: DEVELOPMENT NEEDS OF ODL LIBRARY MIDDLE MANAGERS AND RECOMMENDATIONS

1. To enhance ODL Library middle manager's perception of success

ODL Library middle managers need to understand the impact of the success criteria on their career path and be supported so that their own performance measures up to the perceived importance of the selected success indicators since they experienced that they themselves fall somewhat short/are unsuccessful if compared with the perceived importance thereof.

2. To foster prior to an appointment of aspiring ODL Library middle managers an understanding of factors and strategies that facilitate success

2.1 Work experience, namely academic library experience and ODL experience, relevant to the aspired role of the ODL Library middle manager.

2.2 Qualifications in accordance with the job requirement of the aspired role should include advanced LIS qualifications (in addition to Bachelor degree to ensure further growth in the current position). Senior managers should hold a Masters or Doctoral degree.

2.3 ODL Library middle management support, for example, in the top critically important approaches frequently used by ODL Library middle managers who aspire to be appointed.

- Develop a career plan
- Perform secondary leadership roles
- Attend management short courses
- The value of lower rated development approaches, for example succession planning, should be discussed in accordance with the institution's relevant policy and guidelines; and solutions should be found to address obstacles, such as lack of middle manager positions, experienced by middle managers who aspire to move vertically in the hierarchy; and line manager's involvement in career planning and tracking of progress made through use of career development strategies.
- Family support as an acknowledged external factor that influences the career path of ODL Library middle managers should be understood; and employment equity as an external factor should be internalised in order to benefit from this factor

3. To foster an understanding of factors and strategies which optimise the ODL Library middle manager career path

3.1 Internal development factors:

Importance of these factors, for example ability, determination, hard work and communication to be communicated in support of the implementation of a Talent management programme of the institution; and in support of the institutions drive towards high performance teams.

3.2 An understanding of development needs in the following areas must be fostered:

- LIS environment - in particular the Library's strategic plan
- Management environment- in particular the managers decisional-, interpersonal-, informational role and management related activities
- ODL environment and related activities

3.3 Development strategies

All selected development strategies indicated in the table above should be applied in terms of their perceived critical importance. Middle managers should be supported to use the knowledge gained and progress should be tracked after a development intervention in order fill the gap between importance and use thereof.

4. To foster an understanding of competencies which optimise the ODL Library middle manager career path

4.1 ODL Middle managers should be trained in all competencies due to their critical importance.

4.2 Middle managers should be supported to use the competencies since they experience that they themselves fall somewhat short/ are unsuccessful if compared to perceived importance thereof.

PART 3: Correlation between strategies indicated in Column 1 and 2

<u>Column 1</u>	<u>Column 2</u>
Pearson correlations: career advancement measures	
1. Emotional intelligence and self-management competencies perceived to be more important	Participants' experience towards a feeling of success in practicing emotional intelligence and self-management
2. Emotional intelligence and self-management competencies perceived to be more important to good performance	Higher feeling of being successful in globalisation aspects
Spearman correlations: Success in being appointed and perceived importance of factors and strategies in being appointed	
3. Experience of being successful-at-work/home life balance	Higher experience of being successfully appointed. This implies that the success-experience of impacting-work'-live balance is inversely related to appointment-importance rating
4. Number-of-qualifications-as-development strategy	Success-experience-aspect-of-'respect earned' This implies that as the number of qualifications increase the perceptions of success (as earned respect) increase
5. Number-of-strategies (development approaches) followed	Higher experienced-success-in-career-advancement
Variables that could serve as measures of perceived personal success towards career advancement, or performance or appointment in ODL middle management positions	
6. The indication of how successful the participants consider themselves in terms of own success rated against the definitions of success, namely <ul style="list-style-type: none"> -the position in the hierarchy; -recognition of the person's expertise and competencies and subsequent respect gained from colleagues for work done; -positive effect of the person's work on the organisation; -achievement on a personal level such as -work life and home life balance; -performance during an assessment of annual performance by the line manager. 	Indication of how successful the participants consider themselves to be appointed to an ODL Library middle manager post. This implies: Each of the five sub-questions relating to how ODL Library middle managers perceive their success can be a perceived success indicator to measure how successful participants consider themselves for appointment to an ODL Library middle management post.
7. Competencies rating	The measure of success experience in the current post. This implies that the competencies ratings are an indication of how successful the participants consider themselves to be in their current ODL Library middle manager posts.