

PERSONNEL

STAFF COMPETENCIES AND TRAINING

Staff Standards

Rutgers University
Rutgers University Libraries
Newark, New Jersey

Librarian Competencies—All librarians providing reference service will attempt to adhere to the highest standards of knowledge and proficiency. All public service librarians must have knowledge of the following:

- The reference collection
- Library collection scope (local and system wide)
- IRIS and other networked electronic resources
- Major bibliographic networks (e.g., RLIN, OCLC, and the Internet)
- Libraries' Web site
- Local services and expertise and where to refer effectively within the Libraries systemwide
- Regional and national resources, especially in their areas of expertise
- Library and university policies
- Newly emerging technologies, such as the World Wide Web

Weber State University
Stewart Library
Ogden, Utah

The following performance expectations were developed to enable individuals providing reference service to better understand what is expected of them and to know on what they will be evaluated.

1. Knowledge of Role

Reference team members will have sufficient knowledge and understanding of the following to be able to effectively meet their reference responsibilities:

- A. Role as a Member of the WSU Faculty or Staff: Reference team members are expected to demonstrate a clear understanding of their role as a member of the Weber State University Library faculty or staff and fulfill the responsibilities of their position in a professional manner.
- B. Reference Theory and Practice: Reference team members are expected to have, or to acquire, an understanding of current reference issues, theories, and methods of reference practice appropriate to an academic library.

In keeping with the Library's educational mission, reference assistance should stress providing guidance to users in their pursuit of information rather than retrieval of information for them.

2. Reference Service

To provide effective, high quality service, reference team members are expected to acquire and consistently demonstrate expertise in each of the following:

THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

A. Knowledge of Sources:

To meet users' information needs effectively, reference team members must be able to remember, locate, use, and teach others to use, print and electronic resources in any discipline in the reference and government publications collections and to consult with colleagues and/or the appropriate subject bibliographer when necessary.

Reference team members must also be aware of and refer patrons to relevant print and electronic resources not available in the local collection.

B. Reference Collection Development:

To answer reference questions effectively, reference team members are expected to actively participate with subject bibliographers and the R&IS Librarian in evaluating and selecting relevant print and electronic resources, including a core collection of general sources and basic sources focused on disciplines currently taught by the University.

C. Question Negotiation Skills (Reference Interview):

To understand the user's information needs, reference team members are expected to develop and consistently employ excellent communication and question negotiation skills.

Reference team members are expected to make every reasonable effort to ascertain the nature of the user's immediate information need, to treat the user with courtesy and respect, to address the query in a serious, non-judgmental fashion, and to ascertain, when possible, whether or not the user's information need has been satisfactorily met.

D. Service Orientation:

To provide effective, high quality service, reference team members must consistently demonstrate a strong commitment to service within the context of the educational mission of the University.

Reference team members must be perceived by the patron as friendly, approachable, eager to assist, and strongly committed to helping each patron locate the information s/he needs.

Reference team members are expected to diplomatically assess the expertise of the patron and tailor the assistance to meet the patron's information needs and learning style.

3. Participation in the Reference Program

Reference team members are expected to demonstrate their commitment to and participation in the Reference Program by:

A. Understanding and being able to articulate to others the mission and goals of the Library and the Reference Program.

B. Serving as an advocate for the Library and the Program by displaying an attitude that demonstrates a strong commitment to reference service.

C. Serving their scheduled hours at the Reference Desk and consistently providing high quality reference service.

D. Regularly attending training sessions and using the training to improve their knowledge of reference sources and reference service skills.

E. Providing general library orientation tours as assigned.

F. Providing relevant training sessions for reference team members.

G. Actively participating in Program decision making by:

Keeping informed on reference issues, policies, and procedures.

Regularly attending and contributing to reference team meetings.

Serving on reference team committees.

Participating in the evaluation and selection of new team members.

4. Program Improvement/Problem Solving

To improve and further develop reference programs, reference team members are expected to:

- A. Take the initiative in recognizing and constructively solving problems.
- B. Make recommendations for program improvement.
- C. Be collegial, consultive and supportive—consult and respect others and function as a team member. Attempt to understand the demands made on colleagues and, when possible, help them to meet those demands.
- D. Assist in the training of new members of the Program.

Subject bibliographers are expected to provide reference training in their assigned subject areas for new reference team members.

5. Time Management Skills

To balance their many responsibilities, reference team members are expected to:

- A. Demonstrate a positive work ethic and employ excellent time management skills.
- B. Be able to prioritize responsibilities and activities.
- C. Meet scheduled deadlines and commitments.

6. Interpersonal Relations/Communication Skills

A. With R&IS Librarian:

To carry out their responsibilities, reference team members must be able to communicate effectively with the R&IS Librarian and bring proposed solutions to problems to her/him.

B. With Colleagues:

Reference service is a conclusive process. The degree to which reference team members are effective is often determined by their ability to consult and communicate with colleagues. Reference team members are expected to demonstrate effective interpersonal and communication skills in working with colleagues.

C. With Faculty:

While subject bibliographers have primary responsibility for communicating with faculty, all members of the reference team need to understand faculty library needs and must be able to communicate effectively with faculty.

D. With Staff and Student Assistants:

To solicit support from staff and student assistants, reference team members must understand basic delegation and supervisory principles. In order to explain projects, they must possess good communication skills.

State University of New York Cortland
Memorial Library
Cortland, New York

General Responsibilities of Reference Librarians

Communication and Professional Development

The Librarian(s) in charge of Reference, in cooperation with reference librarians, is responsible for communicating in timely fashion appropriate information directly related to the reference function. Such communication includes the sharing of information and/or special short-term instructions that may be needed by the librarian on duty.

Reference librarians are responsible for maintaining ongoing awareness of new developments within the library, which, in any way, affect reference services. All reference librarians are expected to regularly attend library faculty meetings, etc., and to read all relevant library and college communications.

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Reference librarians are expected to maintain ongoing awareness of trends and developments related to reference librarianship. The reading of relevant professional literature and the continuous review of new reference titles are essential to the provision of quality service. Reference librarians should be able to use computers for information retrieval. They should strive to attain a high level of competency in using the library's online catalog and databases, and a basic level of competency in utilizing other services to which the library subscribes or which the library utilizes, including government documents, online catalogs of other libraries, document delivery services, electronic mail, and other Internet resources.

Approachability and Attitude

Assistance to the individual library user is the chief responsibility of the librarian on duty at the reference desk. In order to encourage users to seek assistance, reference librarians must be approachable. Librarians may do other work at the reference desk (e.g., electronic mail, collection development activities, cataloging, etc.). Reference librarians, however, should not become so engrossed in other work that they fail to respond to users needing assistance.

Problem users will be dealt with in a polite but firm manner. If a user becomes abusive, appropriate action should be taken by calling University Police..

Reference staff members will exercise judgment when questions are asked at the reference desk at closing time. The user may be asked to return the next day if it appears that the question will require lengthy research.

The primary purpose of reference telephone lines is for reference service to off-site users. All other calls should be kept to a minimum.

Staff Continuing Education and Training

Rutgers University
Rutgers University Libraries
Newark, New Jersey

Development and Training—Professional development is the ongoing responsibility of all librarians to maintain current skills, develop new skills, and to implement the information services needed in a constantly changing environment. To support this development the Rutgers University Libraries will provide in-service training for librarians, encourage and support attendance at other professional programs, and provide the appropriate equipment suitable for service at the highest level.

The Libraries will continue to provide, on a systemwide basis, workshops and other formal programs designed to help librarians keep abreast of new technologies and other advances and to maintain traditional skills at a high level. Such programs should include both in-house and external experts.

Individual units will continue to provide local workshops and programs targeted to the needs of local librarians and their immediate constituencies.

All libraries will continue to foster an atmosphere of cordiality and collegiality that encourages colleagues to share their expertise with one another on a formal and informal basis.

Participation in formal and informal educational programs is recognized as a key part of scholarly development.

Teaching Classes Other than Library Instruction

University of Indianapolis
Krannert Memorial Library
Indianapolis, Indiana

Staff Class Teaching/Taking

Librarians with faculty or professional (“exempt”) staff status are eligible by invitation to teach U of I classes in fields of their proficiencies or other educational background, and any university employee may take classes under guidelines enumerated in staff handbooks. In order to coordinate these opportunities with the library mission and daily work, the following guidelines apply:

Teaching University Classes

All opportunities to teach classes result from interactions between librarians and administrators from the teaching faculty; there is no library requirement to teach non-library courses; note—the university prohibits teaching at other institutions without permission.

A class taught at times outside a librarian’s regular schedule of employment does not require the permission of the Library Director, but classes taught within regular employment hours must be approved in advance by the Library Director to arrange for make-up time.

If the librarian is paid for teaching a class, teaching preparations may not be made during library working hours (the salary is intended to pay the librarian’s preparation and class time above and beyond the regular library work contract).

If the librarian is not paid for teaching a class, but the Library Director has given approval, library time may be used for class preparation and class time may be taken without compensatory library hours being worked; staffing coverage for unavailable periods should be worked out with the Library Director.

Taking University Courses

Any staff member may take a course outside his/her assigned working hours without permission from the Library Director.

A staff member wishing to take a course during working hours must obtain prior permission from his/her supervisor AND from the Library Director. Coverage of the absent time and plans for making up the missed time must be worked out.

PROMOTION AND EVALUATION

Core Values for Performance Appraisal

Princeton University
Princeton University Library
Princeton, New Jersey

Core Library Values

Excellence and Service

Taking action and direction to improve job performance in order to effectively meet the needs of patrons, staff, and other customers:

- Anticipates and responds to patron needs and the needs of internal customers.
- Assists all library patrons in a courteous, fair, and non-discriminatory fashion.
- Learns and applies new skills and procedures as established by individual action plans.
- Identifies areas for continuous process improvement.
- Learns about other library jobs or functions that relate to or support the work of the unit.
- Exercises sound and informed independent judgment when appropriate.

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Identifies work problems and moves them forward to resolutions in keeping with the expectations of the position and unit.

Consistently meets clearly delineated deadlines.

Teamwork, Collaboration, and Communication

Working well with others:

Cooperates with others toward the achievement of common goals.

Seeks consensus and productive solutions to problems and conflicts.

Actively contributes and fully participates in tasks of work unit and of the University and or Library committees.

Builds and maintains constructive relationships with colleagues.

Effectively expresses oneself in written and oral communications.

Keeps others adequately informed.

Displays respect, tact, diplomacy, sensitivity and composure when interacting with others.

Exhibits active listening skills.

Technical Literacy

Effectively using the tools required for the job:

Supports and adapts to changes in the technical environment of the Library.

Maintains current knowledge of appropriate computer applications and procedures.

Proficiently and safely uses the appropriate equipment, hardware, and software required to perform individual job duties.

Personal Responsibility

Being an informed and fully participating member of the workplace:

Actively participates in Library education and training offerings that may enhance one's job performance.

Demonstrates willingness to learn new tasks and procedures as required by the changing workplace.

Displays initiative in organizing and prioritizing work, balancing needs for quantity and quality.

Demonstrates awareness of the work unit's mission within the context of the Library's and University's missions.

Keeps abreast of Library developments that may enhance one's job performance.

Complies with all Library and University policies.

Documenting Personal Performance

Princeton University

Princeton University Library

Princeton, New Jersey

Documenting Your Performance

The main purpose of documenting your job performance is to help your memory at the end of the year and have a more productive performance appraisal dialog with your supervisor. There are many ways to keep a record of your job performance. Try experimenting with the ones that you feel most comfortable with and decide which works best for you. The following suggestions have been mentioned by both supervisors and staff at various workshops. If you need any technical assistance, contact Luisa Paster.

Portfolio—Keep a folder with samples of your best work. For example: printouts of your most complex cataloging, a description of your most difficult reference questions, messages of thanks that have been sent to you, statistics of how much you have accomplished on a monthly basis, etc.

Email—Send yourself email describing samples of your best work. You can save them in a special email folder labeled “performance”. You can describe problems that you have solved, difficult patrons that you have dealt with, extra work that you have undertaken, committee work that you have done, etc.

Documents in MS Word—Keep a document on your hard drive called “performance.” List samples of your best work. Every time you accomplish something out of the ordinary on your job, add it to the list with a date. Remember to save the document each time you add an item.

Calendars—Use your calendar to jot down information that might be useful for your performance appraisal. Keep a record of particularly difficult assignments, committee work, special projects, weekly or monthly statistics, etc. At the end of the appraisal period, go through your calendar to jog your memory.

Audiotape—If you don’t like to write, you can borrow a tape recorder from the Staff Development Office to record your accomplishments. When you do something excellent at work, explain it on tape. Keep using the cassette to add to the list. Don’t forget to state the date of each recording. At the end of the performance appraisal period, you will have to listen to the tape and transcribe the recording for your appraisal form.

Princeton University
Princeton University Library
Princeton, New Jersey

Policy Description:

The University’s Performance Evaluation Program encourages ongoing communication between supervisors and employees in order to foster performance improvement and enhancement. Supervisors are required to hold an annual performance appraisal discussion with all employees whom they directly supervise. The appraisal must be summarized in a written memo or appraisal form. Performance evaluations are also used in determining merit increases.

Appraisal Period

Performance appraisal discussions should focus on the employee’s performance during the previous twelve months. Generally, supervisors should complete their evaluation discussions during the first quarter of the calendar year. Supervisors of unionized areas should consult the union contract to determine the specific appraisal period.

Elements of the Appraisal Process

The core elements of the annual performance evaluation are summarized as follows.

1) Discussion, by supervisors, regarding performance with each of the administrative and support staff members who report directly to them. Each discussion includes:

- a) the supervisor’s assessment of the employee’s performance during the past twelve months, including specific reference to the accomplishments and contributions made by the employee and the areas where he or she should improve.
- b) a review of any changes to the employee’s responsibilities which may have occurred, and a summary of the expectations of performance to which the employee will be held accountable, as determined by the supervisor with employee participation.
- c) an agreement between the supervisor and the employee on a plan designed to improve or enhance the employee’s performance which may include workshops, conferences, course work, or special work projects.
- d) discussions which provide opportunities for the employee to suggest to the supervisor what additional guidance or support would enable the employee to do a better job.

2) A written summary of the discussion prepared by the supervisor with a copy to the employee. The employee can attach comments to the summary document. The supervisor and employee should try to resolve any disagreements regarding the summary prior to the employee’s attaching his or her statement.

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The supervisor, at the time of salary review, will provide feedback to the employee as to how his or her salary increase for the current year relates to the performance discussion.

Retention

The final performance evaluation document should be held in a confidential department/office file, or may be sent to the Office of Human Resources for placement in the employee's official personnel file. In either case, the performance evaluation document must be held in the appropriate file for a minimum of three years, or longer if there is a good business reason.

Employee Access

Employees have access to official evaluation documents upon request and may make copies. Employees may also use an official copy of the evaluation as part of their application materials for promotion/transfer opportunities at the University.

Referral

Office of Human Resources.

FORMS

Performance Appraisal Form

Princeton University
Princeton University Library
Princeton, New Jersey

Performance Appraisal Form

Princeton University Library is committed to building employee and departmental potential by developing and rewarding employee skills and efforts. The performance appraisal program rests on a basis of honesty, trust, and respect. The appraisal should be considered part of an ongoing dialogue between employee and supervisor.

Employee's Name: _____

Supervisor's Name: _____

Work Unit: _____

Type of review: Probationary _____ Interim _____ Annual _____

Period covered: _____

I. **CORE LIBRARY VALUES** (refer to "Core Library Values")

1. Excellence and Service

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

2. Teamwork, Collaboration, and Communication

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

3. Technical literacy

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

4. Personal Responsibility

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

II. POSITION SPECIFIC PERFORMANCE STANDARDS

Indicate 3–7 position specific standards as appropriate. Attach fully delineated standards on separate sheet if desired.

1.

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

2.

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Specific examples:

Action/Development Plan:

3.

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Specific examples:

Action/Development Plan:

4.

Exceptional contributions _____ Standards attained _____ Improvement needed _____

Commentary with specific examples:

Action/Development Plan:

5.

Exceptional contributions _____ Standards attained _____ Improvement needed _____

THE ACADEMIC LIBRARY MANAGER'S FORMS, POLICIES, AND PROCEDURES HANDBOOK

Commentary with specific examples:

Action/Development Plan:

6. Exceptional contributions_____Standards attained_____Improvement needed_____

Commentary with specific examples:

Action/Development Plan:

7. Exceptional contributions_____Standards attained_____Improvement needed_____

Commentary with specific examples:

Action/Development Plan:

III. SUPERVISOR'S COMMENTS (Required)

IV. EMPLOYEE'S COMMENTS (Optional)

Signatures:

Supervisor:

Date:

Employee:

Date:

Supervisor's supervisor:

Date:

Annual Evaluation Form