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Utilizing new staff training initiatives to develop and implement reference competencies at the UNLV Libraries

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SECTION III.4

Staff Development and Training

CHAPTER 19

Utilizing New Staff Training Initiatives to Develop and Implement Reference Competencies at the University of Nevada, Las Vegas Libraries

Victoria Nozero and Sidney Lowe

Overview

Building on an orientation program established by the University of Nevada, Las Vegas (UNLV) Libraries' Human Resources unit for all new employees, the Research and Information Department developed a training and orientation program for new employees who participate in the reference desk service pool. A task force composed of service pool members created a checklist of expectations that led to a new mission statement and core values for the department as well as a time line for training new employees. The use of a staff wiki to provide access to the expectations, time line, and other resources is explored. Assessment mechanisms, adjustments to the program, and future plans are detailed.

Introduction

The University of Nevada, Las Vegas is located on a 350-acre campus and is classified in the category of a high research activity university by the Carnegie Foundation for the Advancement of Teaching. UNLV is an urban commuter institution of 28,000 students, 3,300 faculty and staff, and offers more than 220 undergraduate, master's, and doctoral degree programs ("Best Colleges," 2008). Lied Library, the 300,000 square-foot main campus library at UNLV, opened for business in January of 2001, replacing an outdated and much smaller facility.

Like many new academic libraries, it was designed to be not only an attractive and comfortable space for students but also the place for UNLV's faculty and students to access information resources and services for their research and learning, both in person and virtually.

At Lied Library, providing services to meet the needs and expectations of a new generation of techno-savvy users included implementing chat and e-mail reference, acquiring electronic databases across the curriculum, and establishing two full-service reference desks on separate floors of the library. The reference service pool is a diverse group of 30 members comprised of librarians, para-professionals, students, and volunteers from library departments outside of the public service realm. The skills and experiences of these individuals vary widely, and previous training efforts primarily consisted of a combination of on-the-job learning by "shadowing" at the reference desk and informal guidance from experienced reference staff.

Process

Soon after moving into Lied Library in 2001, the Human Resources unit worked with supervisors to develop an orientation checklist for supervisors of new employees. Similar to checklists developed by other libraries, included in UNLV Libraries checklist were activities to be completed prior to the arrival of the new employee, such as preparation of the workspace, installation of phone lines, obtaining an e-mail account and appropriate keys, and acquisition of necessary office supplies (Rogers, 1994). Also included in the checklist are various policies and procedures that need to be imparted to new employees, such as leave policies, holidays, and annual evaluations. In addition, supervisors are to discuss performance expectations and introduce the new employee to their colleagues in their own units and to other colleagues in other departments and divisions. For librarians, the checklist includes meetings with the Library Faculty Moderator, Tenure and Promotion Committee, and Merit Advisory Committee. Meetings with the campus Human Resources staff to explain and select health and retirement benefits are required for both librarians and support staff.

After the creation of a staff wiki in 2007, separate orientation pages for support staff and librarians were created that explain the different policies that apply to each category of employee. Links to relevant staff and campus Web pages are also provided. Supervisors are expected to socialize new employees into the culture and values of the organization. As described by Ballard and Blessing (2006), successful socialization into the organization "may indicate a new employee's job satisfaction and influence his or her longevity in the organization" (p. 240).

However, the orientation for new employees is very generic and intended for all new employees, regardless of their position in the libraries' organizational structure or their responsibilities. The progressively complex levels of knowledge

and skills needed to provide excellent user services necessitated a new emphasis on staff development for the Research and Information (R&I) Department of Lied Library. After five new entry level librarians and staff were hired within a period of two years, the department identified the need for a more formalized orientation program to include organized and consistent basic training in reference services and resources for its new employees. Ballard and Blessing (2006), citing an article by Claudia Reinhardt (1988), go on to say that organized and consistent orientation programs have been shown to "prevent performance problems, instill positive attitudes about the organization, and pave the way for better communication between the supervisor and the new employee" (as cited in Ballard & Blessing, 2006, p. 241). Certainly these are all goals an organization has in mind when a new employee is hired. Orientation programs, if they are well thought out, relevant, objective, and consistent can make the socialization of new employees successful for both the employees and the organization.

There were additional motivations for the growing movement toward an orientation initiative. Results from the national LibQual survey indicated that there were perceived patron service weaknesses to be addressed, particularly in the area of "knowledgeable staff." R&I management decided to address this gap between user expectations and perceptions first through a better orientation program for new employees.

The New Staff/Volunteer Training Task Force, composed of volunteers from the service pool, was formed to organize an orientation program. The charge of the task force included several elements, and its underlying principle was that the desk staff were expected to be customer oriented and also to be knowledgeable about UNLV, the libraries, and its policies and information resources. The group was charged with preparing a checklist of the skills and knowledge base expected of new R&I service pool members. The pool consists of several categories of staff that provide reference services, and it was initially thought that there should be a separate checklist for each staff category. The task force was also charged with recommending methods for training new service pool staff to acquire the skills and knowledge defined in the checklist and for developing an objective means to determine when participants reached the desired levels of competency.

The task force began meeting regularly to work on its assignment, and it started by breaking down the components of the charge and then dividing the labor among its members. A literature review was conducted for benchmarking other academic libraries in the area of orientation to identify and adopt the best practices. Contacts were made with other libraries, who shared their reference checklists, standards, and competencies, and the group began to develop the UNLV Libraries' checklist of expectations for its new employees. As members of the task force began to work on the checklist, it became apparent that the group's charge should be amended to reflect the realities of our organization.

Although there are several categories of staff that work on the two reference desks, the differences between services provided at each of the service desks were greater than the differences of expectations between staff categories. The separate desks are distinguished principally by their physical surroundings. The first floor R&I desk is centrally located in a high traffic area close to the library's Information Commons and the noncirculating reference stacks, and it also shares space with the Computer Help Desk. Reference questions range from quick directional and informational queries to in-depth research assistance, and desk staff also handle overflow computer help questions. The second floor desk is situated near the current and bound periodicals, government publication stacks, and the majority of the library's microform collections with their scanner/printer stations. Much of the patron service at this desk includes hands-on assistance with these unique tools and materials. The task force members decided that it would be more beneficial for new employees to work from *one* expectations checklist with sections for each of the two desks listing the fundamental skills for *all* categories of staff. Additional sections of the checklist included resources, policies, customer service, and equipment and facilities. A copy of the R&I Department's general checklist for participation in the service pool is provided as Table 19.1.

The checklist was at first the primary product of the task force's efforts, but there was an unexpected outcome in the evolution of their work process. As the customer service component of the checklist was developed, the need for clarifying

Table 19.1. Research and Information Service Pool Expectations

Resources	Policies	Customer Service	Equipment and Facilities
Be aware of key library services and collections of the Lied Library and the UNLV branch libraries.	Know how to find the UNLV Libraries' policies and procedures, including those of the various library departments.	Adhere to the American Library Association's Guidelines for Behavioral Performance of Reference and Information Service Providers (RUSA Reference Guidelines). These can be found at www.ala.org/ala/rusa/rusaprotocols/referenceguide/guidelinesbehavioral.htm .	Know the basic functions of the R & I desk telephones, including transferring calls, forwarding, and retrieving and deleting voicemail messages.
Possess a general working knowledge of the location and accessibility of libraries' electronic, media, and print resources.	Know the location of Computer Guest Use Policy and Guidelines.	Acknowledge patrons who are waiting for assistance.	Have basic knowledge and locations of copiers, printers, and scanners.

(Continued)

Table 19.1. Research and Information Service Pool Expectations (Continued)

Resources	Policies	Customer Service	Equipment and Facilities
Be able to navigate the UNLV Libraries' Web site to retrieve information.	Be able to locate resources or make appropriate referrals when library policy issues arise.	Know where to find subject/liaison librarian contact information on the libraries' Web page.	Know how to use the print system to "push" print jobs for patrons when necessary.
Know how to locate and search databases linked from the homepage of the UNLV Libraries' Web site.	Be aware of the current policy regarding guest researchers, visiting faculty, and unaffiliated patrons with specific research needs.	Know the basic functions of chat reference, e-mail reference, and where to enter statistics data.	Be familiar with and follow the established procedures for reporting technical problems and/or equipment malfunctions.
Know how to locate course reserves, both physical and electronic reserve materials.	Know that any patron specifically requesting government information must be given access to both print and online government publications.	Know where the off-desk reference statistics database resides and how to enter statistics data.	Know when and how to contact UNLV Libraries' security staff.
Be able to conduct basic and modified searches on the libraries' online catalog.		Provide referrals and/or directions to other service points when R & I is not the appropriate contact.	
Know how to find information on style guides for citing references (APA, MLA, and Chicago).			
Know the locations of print and electronic handouts and flyers.			
Have the ability to use Pharos Remote to send print jobs to printers.			
Meet with the designated computer help desk trainer to learn the basics of the computer help desk operations, public computers, and FAQs.			

Note: This table presents the basic skills and knowledge expectations for all participants in the UNLV Libraries' Research and Information Service Pool. After an initial orientation and training period, all participants in the UNLV Libraries' Research and Information Service Pool are expected to have full competency in each category.

the department's vision emerged. A new mission statement was written, vetted with the service pool and disseminated to staff and patrons by placing it on the departmental Web page, and the task force also developed a set of core values that characterized its underlying service principles. The task force believed that a clear statement of the mission and core values of the department that was shared with employees at an early stage in their tenure with the organization was an important element in the socialization of new employees.

In addition to the checklist, the task force also developed other training tools. An orientation plan and timeline was developed that was divided into a set of training sessions designed so that the new employee would learn new processes in a logical sequence of learning. One task force member worked on a frequently asked questions (FAQ) knowledge base, and another developed a referral List. The latter was a list of identified library "experts" in specific subject areas for in-depth research assistance or who were responsible for specific library tasks or processes for patron referrals from the reference desk.

As the group worked on the new employee orientation plan, it became clear that these training tools would also be useful for experienced service pool members as well as other library staff. The UNLV Libraries' staff wiki was an excellent place to house the checklist and other tools, so a department wiki was created. The department's orientation and training documents were posted on the wiki, along with links to useful resources such as video clips of reference interviewing techniques and the American Library Association's Reference and User Association's *Guidelines for Behavioral Performance of Reference and Information Service Providers* (Ward et al., 2004). Since wikis allow for relatively easy editing, it was simple for the task force to contribute additional tools and to update them as needed. In addition, use of the wiki allowed access to all service pool members for maintaining their own skill levels.

The training and orientation tools of the task force were tested by three new employees, and the group was interested in evaluating the results of their efforts. In his library training guide, Bruce Massis (2004) lists key questions that an evaluation team should ask participants to determine the effects of the training program. Some of these are the following:

- Is the training content accurate and relevant to the participants' jobs?
- Is the training information presented well by the instructor?
- Is the training timely (not too early or too late)?
- Did the participants retain what they learned?
- Are the participants applying what they learned back on the job? If not, why?
- Do the work processes allow the participants to apply what they learned?

The initial assessment efforts of the R&I Department included creating an orientation completion checklist on a spreadsheet that would allow for trainers and new employees to check off and date their assigned tasks and objectives. Upon completion, new staff were then interviewed to assess their competency level and orientation experience. This feedback approach was valuable for modifying future training initiatives, and there was much room for improvement. For example, the timeline has been changed to allow related items to be grouped together in a more coherent manner, the spreadsheet has been made available to the new employees, and staff changes have required changes in trainers.

In measuring the success of a training program, the question of retention of the content is an important one. Massis referred to Hermann Ebbinghaus's work in evaluation and learning theory when he stated that "people forget 90 percent of what they learn in a class within thirty days" (as cited in Massis, 2004, p. 59). He then stressed the vital importance for staff training program participants to immediately apply what they have learned in their work setting (Massis, 2004). To reinforce the information new employees are receiving through the formalized orientation program, new R&I staff begin shadowing at the service desks with experienced librarians in order to see what they have learned in action.

Retention of information is a driving force for future R&I Department training and orientation initiatives. The UNLV Libraries' R&I task force plans to add a requirement to its orientation program that provides for recertification of the entire service pool on a regular basis. An ongoing training program is being developed that includes online modules, library guides and tutorials, hands-on training sessions, regular maintenance of the service pool's core competencies, and additional resources for the wiki pages.

Conclusion

While the process followed in creating the Research and Information Department's orientation program was time consuming and difficult, the benefits far outweighed these concerns. First, involving staff at an early stage allowed the task force to address some issues that had long been of concern to management, such as the development of core values and application of the expectations to all staff, not just new hires. However, one major obstacle has been discovered: it is difficult to maintain the same momentum over a long period of time, especially when a project is outside the regular job responsibilities of those involved. Another issue confronted by management has been the slowdown in the hiring of new staff. Keeping an orientation program vital and effective when no new staff is being hired is a major challenge. To address some of these concerns, department and division managers are now looking at ways to provide training to new and continuing staff using self-paced tutorials and/or screencasting.

As is true of any staff training program, new staff orientation is not static or ever really complete. It is inherently a program that needs constant and systematic review and revision. We do feel, however, that our process of involving staff early in the development of staff expectations and a consistent orientation/training program is beneficial to everyone involved and can be effective in socializing new staff and providing research assistance and customer service that meets or exceeds user expectations.

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Additional Readings

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