GEORGE A. SMATHERS LIBRARIES STAFF CORE COMPETENCIES INDEX

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INTRODUCTION

Well developed competencies form a framework for identifying and cultivating successful employees by applying competencies to the selection, professional development/training and evaluation processes. In an effort to link desired employee performance more directly to job descriptions and provide a directed training program, the UF Libraries, has developed the competencies classification system described in this document. This system establishes specific job competencies for library assistant and library associate positions in the Smathers Libraries based on existing job descriptions.

The Smathers Libraries have chosen to define and identify competencies related to knowledge, skills, abilities, and behaviors required to be successful in library staff positions at the assistant and associate levels. This plan focuses on family specific competencies (functional/technical competencies) that will provide a framework for identifying and cultivating successful employees. To this end, it is important to note that not all competencies identified will be cultivated via traditional "training" approaches. Certain competencies are best (and more economically) identified through the recruitment and selection process. These competencies are typically ones that applicants will have had the opportunity to develop and demonstrate in their careers to date, whatever their jobs. Other competencies, however, can be cultivated very effectively through development—which will include "training" as traditionally defined as well as training offered via readily available and current sources of information (web sites, job aids, and procedures manuals), online tutorials, on-the-job training, etc.

The Smathers Libraries has identified the following specific benefits of applying a competencies based index to positions within the libraries:

- Assisting the libraries in developing a needs-based and outcome oriented directed training and development program that meets the needs of employees, their supervisors and the libraries as a whole.
- Focusing on current and future skill needs to direct the libraries' recruitment efforts.
- Using competencies for performance planning purposes thus providing the libraries with performance standards and expectations that can be applied more uniformly across departments.
- Helping employees align themselves with the mission and vision of the libraries and to identify needed workplace behaviors so that they can self direct and develop professionally.
- Providing direction to employees who wish to advance in their career path.

The competency families selected by the Smathers Libraries are divided into to two categories as follows:

1. **Cross-Departmental Competencies**
   - Institutional Competencies
   - Professional-Interpersonal
   - Management
   - Technology
2. **Area-Specific Competencies**
   - Public Services
   - Cataloging
   - Preservation
   - Digital Services
   - Acquisitions
   - Fiscal Services

Within each competency family, areas of expertise were identified and broken into a maximum of six skill levels. Each competency was analyzed and skill levels established between one and six. Each skill or knowledge level builds on the previous unless otherwise indicated. It should be noted that the skill levels selected for each competency do not necessarily, but sometimes may, correspond with the Smathers Libraries six staff classifications of Library Assistant I through Library Associate III.

A classification system tied to evolving position descriptions is clearly not a static document and will require updating as library assistant and associate jobs within the UF Libraries change. The intention is for this document to be reviewed on a regular basis under the management of Smathers Libraries Human Resources Department personnel.

Links:
Smathers Libraries Job Competencies Working Group LibGuide:
http://libguides.uflib.ufl.edu/content.php?mode=preview&pid=80129&sid=593493
Current List of Smathers Libraries position descriptions: http://www.uflib.ufl.edu/HRPD/
Earlier work completed by the Staff Structure Reorganization Committee:
http://www.uflib.ufl.edu/committees/SSRC/default.htm

I - CROSS-DEPARTMENTAL COMPETENCIES

INSTITUTIONAL COMPETENCIES

GENERAL SMATHERS LIBRARIES INFORMATION
- Knowledge of general information pertaining to the following:
  - Knowledge of the Smathers Libraries mission (when available)
  - Knowledge of departmental goals.
- Ability to navigate the Smathers Libraries website and find general information.
- Ability to find and use phone and email directory.
- Ability to find Smathers Libraries organizational chart.
- Knowledge of general and departmental specific hours of operation.
- Ability to find Libraries floor plans.
- Understands various roles within the Libraries.

GENERAL SMATHERS LIBRARIES PROCEDURES
- Ability to prepare pertinent information for service requests through GROVER for IT, purchasing and building maintenance needs.
- Ability to follow up on issues through GROVER's communication features - notes, progress, e-mail.
- Familiar with emergency and evacuation procedures.

WORKPLACE STANDARDS
- Knowledge of workplace standards including:
  - Privacy policies - http://privacy.ufl.edu/pandp.html
    - Information Privacy
    - Online/Internet Privacy
    - HIPAA & Privacy Awareness – training required for HSCL employees
  - Disclosure of Outside Activities policy - http://www.hr.ufl.edu/recruitment/policy/outside.asp
  - Non sexual harassment policy – training required - http://www.hr.ufl.edu/eeo/sexharassment.htm
  - Institutional Equity and Diversity - http://hr.ufl.edu/eeo/regulations.htm

GENERAL UNIVERSITY INFORMATION
- Knowledge of general information pertaining to the following:
  - Acceptable use of computing resources policy
  - Parking policies and procedures
  - Gator1 card use
  - Performance appraisal procedures
- Ability to locate and use information pertaining to the following:
  - University website
  - Campus map to locate various buildings, colleges and parking lots
  - Transportation options on campus
  - Basic knowledge of the history of the University of Florida
  - Campus directory
  - PCard policies and procedures
  - Training and development opportunities

PROFESSIONAL-INTERPERSONAL COMPETENCIES

VERBAL COMMUNICATION

*Level 1
- Ability to clearly share ideas to small groups in an informal setting such as departmental meetings.
- Listens effectively and transmits accurate, factual information.
- Accepts constructive feedback.
- Ability to summarize basic ideas and processes as presented or written.
- Speaks clearly and logically.
- Treats others with respect.
- Ability to communicate and explain unit policies and procedures.

Level 2
- Ability to communicate complex ideas and processes in a clear and concise way.
- Understands and considers the needs of diverse users when responding to or initiating communication.
- Ability to request and receive constructive feedback.
- Appropriately uses a variety of communication tools to facilitate communication.
- Ability to communicate and explain Libraries' policies and procedures.

Level 3
- Understands the importance of clear verbal communication skills and ability to give constructive feedback.
- Ability to communicate and explain University's policies and procedures.

WRITTEN COMMUNICATION

*Level 1
- Ability to respond appropriately to written communications and announcements.

Level 2
- Writes clearly, logically, and concisely.
- Utilizes workplace communication best practices for various written medium.
- Ability to read and communicate the main ideas and details.
- Ability to write effective reports, memos, letters and emails, and responds in the most appropriate media or form.

Level 3
- Ability to write effective web pages, articles, statistical reports, performance reviews, and procedure manuals and responds in the most appropriate media or forms.

PRESENTATION SKILLS

*Level 1
- Understands public speaking and presentation concepts.
- Clearly presents ideas to an audience and answers questions appropriately.

Level 2
- Presents departmental specific information to groups in and outside the libraries – such as library tours.
- Adjusts style and format of presentation based on audience.
- Clearly articulates and prepares materials in support of presentation topic.
- Anticipates questions and answers appropriately.

Level 3
- Presents library specific information to groups in and outside the libraries.
- Plans and delivers communications that are impactful and persuasive.
- Delivers proactive communications on key issues.
- Creates a compelling presentation.

CUSTOMER SERVICE
Level 1

- Desires to efficiently, effectively and positively meet the Library needs of internal and external customers. Recognizes the variety of customers in communities and at all levels of the organization and accommodating their diverse needs.

TEAMWORK/COLLABORATION
*Level 1
- Works collaboratively with other staff in unit to accomplish goals.
- Ability to develop goals in collaboration with unit staff.
- Accomplishes stated goals.
- Communicates appropriately and takes action within team as needed.
- Respects the ideas and opinions of others.
- Accepts and offers help when needed.
- Gives and accepts feedback in a positive manner.
- Works effectively and respectfully within a diverse university environment.

Level 2
- Develops collaborative relationships inside and outside the libraries to accomplish goals.
- Identifies and pursues opportunities to improve performance through partnerships.
- Understands and values diversity of ideas and styles within the team.
- Encourages shared decision making and supports innovative ideas.

Level 3
- Encourages cooperation, trust and group identity.
- Leads others to achieve team goals.
- Balances autonomy and collaborative efforts to produce the best results for the team.

Level 4
- Exhibits constructive conflict resolution skills.
- Facilitates win-win situations.
- Encourages inquiry and dialog.
- Manages the group diversity of views and work styles to accomplish unit goals.

ADAPTABILITY
*Level 1
- Adapts to changes in direction and priorities.
- Adapts to new ways to accomplish work activities and objectives.
- Adapts to new responsibilities and assignments.

Level 2
- Contributes well to changing direction and priorities.
- Contributes well to support change as a healthy part of organizational growth.
- Contributes in seeking-out opportunities to grow professionally and agreeably works outside of ordinary routine.

Level 3
- Anticipates and assists unit in preparing for change.
- Facilitates changes in direction, priorities and work flow.
- Champions change as a healthy part of organizational growth.

INDEPENDENCE/INITIATIVE/PROBLEM SOLVING
*Level 1
- Makes minor decisions and uses common sense in performing job duties.
- Requests assistance as needed.

Level 2
- Exercises some discretion in selecting alternative work methods or in rendering independent judgments when given an unusual situation or problem.
- Analyzes information and tasks to be completed with limited autonomy.

Level 3
- Exercises a moderate amount of independent judgment in developing work sequences and in selecting alternative work methods.
- Analyzes and performs assigned tasks with little routine supervision.

Level 4
- Exercises a general degree of authority, independence, and initiative in prioritizing, decision-making or problem solving, using discretionary judgment.
- Analyzes data and situations to solve complex, non-routine problems.
- Interprets general policies and develops procedural instructions for use within the unit.

Level 5
- Exercises a high degree of authority, independence, and initiative in prioritizing, decision making, creative problem solving that requires careful interpretation and frequent use of discretionary judgment.
- Use of independent judgment in planning sequence of major operations and in making decisions from complex alternatives.
- Decisions may affect the entire functional area or department.

Level 6
- Exercises an exceptional degree of authority, independence, and initiative in decision making and creative problem solving that requires careful interpretation and constant use of discretionary judgment.
- Uses independent judgment to develop general objectives and plans which may substantially affect functional area or department, and perhaps the Libraries.
- Selects course of action from complex alternatives.

PLANNING & ORGANIZATION

Level 1
- Uses established systems to organize and keep track of information (files, appointment calendars, etc…).
- Understands priorities and keeps clear records of completed and pending activities.
- Participates as a team member in planning and organizing information and unit activities.

Level 2
- Participates in developing streamlined systems to organize and track unit information and activities.
- Sets priorities with an appropriate and realistic sense of the time demand involved.
- Works with other members of the team to analyze and evaluate progress towards goals and objectives.

Level 3
- Anticipates and develops new procedures and systems in response to changing priorities.
- Develops and monitors complex tracking and organizational systems which may substantially affect functional area or department, and perhaps the Libraries.
- Understands the role of the unit's organization and planning within the larger context of the libraries.

MANAGEMENT COMPETENCIES

SUPERVISION

Level 1
- Assists in recruiting, training and monitoring OPS and student employees.

- o Should have knowledge of and ability to implement basic regulations that govern employment, and library policies, procedures and practices as they relate to OPS and student employees.
- o Ability to direct employees in the performance of daily tasks.
- o Ability to provide basic training.

Level 2

- Recruits, hires, trains and supervises OPS and student employees.
  - o Should have knowledge of and ability to implement libraries recruitment and hiring policies and procedures as they relate to OPS and student employees.
  - o Knowledgeable about State and Federal recruitment and hiring regulations.
  - o Understands and complies with library policies and procedures that impact recruiting and hiring as they relate to OPS and student employees.
  - o Supervises and directs employees in the performance of duties and monitors goals.
  - o Ability to direct questions regarding performance to the appropriate person in the department.
  - o Ability to approve time in PeopleSoft.

Level 3

- Recruits, hires, trains and supervises regular staff
  - o Should have knowledge of and ability to implement libraries recruitment and hiring policies and procedures.
  - o Should be knowledgeable about State and Federal recruitment and hiring regulations.
  - o Understands and complies with library policies and procedures that impact recruiting and hiring.
  - o Ability to lead a staff performance evaluation and planning session with supervisees according to University's policies and procedures.
  - o Supervises and directs employees in the performance of duties and monitors long term goals.
  - o Ability to apply disciplinary measures with supervision when needed.

Level 4

- Manages a unit of library employees with direct responsibility for recruiting, hiring, training, and evaluating any combination of OPS, student employees and regular staff.
  - o Fosters and facilitates a collaborative environment based on a shared vision.
  - o Promotes teamwork among staff.
  - o Recognizes staff achievements through formal and informal methods.
  - o Knowledge of and ability to implement and train others in basic Federal and State regulations that govern employment law.
  - o In depth knowledge of and ability to implement and train others in library policies, procedures and practices for recruiting, hiring, training and evaluating employees.
  - o Ability to recognize and address job performance and personnel issues and take corrective measures when needed.

PROJECT MANAGEMENT

Level 1

- Ability to effectively serve on a project team.
  - o Understands project goals and the necessary steps to accomplish those goals.
  - o Understands one's role in the project.
  - o Works as a team member on the project and communicate ideas and problems clearly.

Level 2

- Ability to lead a project team and assume responsibility for project completion.
  - o Conceptualizes the phases of the project.
  - o Employs sound project management principles and procedures in the planning and implementation of programs and services.
  - o Leads work team with clear direction and effective communication.
  - o Ability to assign roles to individuals involved with the project including being ability to recognize people's strengths.
  - o Ability to create a project timeline and budget (if necessary).
  - o Ability to lead the project from implementation to completion.
  - o Ability to monitor and evaluate the project and use the results for project improvement.

Level 3
- Ability to lead multiple project teams and assume responsibility for project completion.
  - Ability to lead multiple simultaneous projects and manage cascading impacts from changes to any single project.
  - Ability to modify project timelines and budgets for all applicable projects in response to changes.

STAFF TRAINING
Level 1
- Ability to train OPS and student and regular employees in basic departmental skills and, policies and procedures.
  - Knowledge of current departmental practices, policies and procedures.
  - Ability to teach basic skills in a simple and systematic way and evaluate trainees for comprehension.

Level 2
- Ability to train OPS, student and regular employees in complex departmental policies and procedures.
  - In depth knowledge of current departmental practices, policies and procedures .
  - Ability to explain and teach complex skills and procedures.
  - Ability to answer complex questions related to departmental policies and procedures.
  - Ability to evaluate the effectiveness of training.

Level 3
- Ability to lead group training sessions on skills and, policies and procedures relevant to one's job and department.
  - Designs training activities to meet the needs of targeted audience and to support specific results.
  - Understands and applies instructional design concepts.
  - Ability to communicate concepts clearly to a group of people.
  - Ability to evaluate effectiveness of training sessions and modify training based on specific group needs.

Level 4
- Ability to establish long-range training needs for department and support career development opportunities for department staff.
  - Creates a culture that enables both formal and informal learning process in department.
  - Conducts assessment of staff training needs.
  - Creates development plans for staff to gain necessary competencies.
  - Fosters staff growth and opportunity through informal mentoring.

POLICIES AND PROCEDURES
Level 1
- Interpret, apply and explain policies and procedures relevant to work unit.
  - Ability to suggest new policies or procedures or ways to improve existing policies and procedures within department.
  - Ability to clearly explain unit procedures to others.

Level 2
- Interpret, apply and explain policies and procedures relevant to Libraries.
  - Ability to suggest new policies or procedures or ways to improve existing policies and procedures within Libraries.
  - Ability to clearly explain Libraries procedures to others.
  - Ability to explain policies and procedures for the University and Libraries.

Level 3
- Develop, implement and evaluate policies and procedures based on library's mission and user needs to guide efficient and effective library operations.
  - Interpret the needs of a unit and develop policies and procedures consistent with those needs.
  - Evaluate and modify existing policies based on feedback and changing needs of the Libraries or unit.
  - Understands and able to explain the relationship between library policies and customer service.
  - Continuously evaluates the needs for new or revised policies and procedures within work unit.

BUDGET & FUNDING

Level 1

- Understands basic purposes and concepts of library funding such as where funds come from, and restrictions for funding within unit.
    - o Ability to locate budget information needed and generally interpret data.
    - o Submits paperwork for reimbursement as requested.

Level 2

- Ability to manage a budget such as OPS, travel, supplies, books, etc…
    - o Understands how to use budget and access information regarding expenditures.
    - o Ability to spend wisely within a budget allocation while accomplishing goals.

Level 3

- Ability to develop and implement budgets
    - o Understands Libraries' policies and procedures and works with Fiscal Services in developing and monitoring budgets.

FACILITIES

Level 1

- Ability to find and understand policies related to building and emergency procedures.
    - o Knowledge and ability to submit incident reports.
    - o Knowledge of building layout and general emergency procedures.
    - o Knowledge of who to contact concerning routine maintenance problems.

Level 2

- Ability to implement emergency procedures and knowledge of emergency/maintenance contacts.
    - o Ability to direct other staff members as to appropriate action in the case of an emergency.
- Ability to open or close a branch.
    - o Knowledge of how to make emergency maintenance requests including those during off hours.
    - o Ability to adapt and solve problems relating to building issues.

Level 3

- Ability to implement emergency procedures and direct others.
- Knowledge of UF policies regarding property inventory.

Level 4

- Engages in Facilities planning activities.

TECHNOLOGY COMPETENCIES

BASIC

*Level 1

- Understands and applies the library's computer and Internet usage policies .
- Ability to navigate through UF website and find information pertinent to job duties .
- Can log in and navigate through myUFL.
- Ability to view paycheck in myUFL – My Self Service.
- Ability to register for training through myUFL – My Self Service.
- Ability to register for training through Libraries ITS training database.
- Ability to report time in myUFL.
- Is familiar with departmental/branch access logins and passwords.

Level 2

- Ability to approve time in myUFL.

- Ability to produce training reports in Libraries ITS training database.
- Is able to navigate to and find UF policies and procedures pertinent to employment, training and supervision.
- Ability to approve GROVER tickets.

OUTLOOK APPLICATIONS

*Level 1

- Ability to perform basic email functions including:
  - Login in to UF webmail – work offline and remotely
  - Receive, open, forward as needed, and delete email messages
  - Compose or reply to, address and send e-mail messages
  - Send, receive and save attachments
  - Authenticate attachments before opening
  - Manage address and contacts
  - Create and manage folders for retrieval as needed
  - Use the Out of Office Assistant
  - Create and use a custom email signature
- Ability to perform basic calendar operations and task management including:
  - Create, accept and set one time and recurring appointments
  - Set reminders for calendar items
  - Plan and schedule meetings and invite attendees
  - Create and manage task list

Level 2

- Ability to perform email functions including:
  - Navigate to the Libraries Folder List
  - Share calendar with others
  - Set message options
  - Manage and export contacts
  - Perform a mail merge and create custom forms
  - Use the task feature to track activities

CORE WORKSTATION MANAGEMENT

*Level 1:

- Understands and uses basic computer hardware and peripherals:
  - Recognize and understand the functions of basic computer components and peripherals (desktop/tower unit, monitor, keyboard, mouse, input/output connections, printer, scanners, etc.).
  - Perform basic operations on computer hardware (plug in, start-up, shut-down, reboot, mouse functions, keyboard functions, uses headphones and speakers).
  - Recognize common removable storage devices (CD or DVD disks, external hard drives, USB drives, floppy disk) and identify the appropriate drives.
  - Perform basic printer tasks such as:
    - Send print jobs to a non-default printer
    - Change the default printer
    - Load paper and cartridges
- Basic Troubleshooting including:
  - Check power connections and plugs
  - Ensure peripheral cables are connected
  - Check Ethernet cable to ensure it is plugged into receptacle
  - Clear printer paper jams
  - Cancel a print job

Level 2
- Ability to perform basic hardware tasks including:
  - Recognize/report/request replacement of defective peripherals (mouse, keyboard, monitor, etc.).
  - Seek unit authorization and coordination with IT Department for hardware purchases/installation.
  - Understand the use of data projectors and other audio-visual equipment used for library programming.
  - Set up and use conference room equipment (LCD projectors, Video conferencing, Touch interactive panel / screen units, etc.).
  - Add a networked printer.

CORE WEB
Level 1
- Ability to perform basic Internet tasks including:
  - Log on to UF and library web pages.
  - Identify and use common browsers for accessing the Web; understand and use URLs .
  - Use common functions of Web browsers (navigation buttons, scroll, add "bookmarks" or "favorites").
  - Search for text in a web page.
  - Download and save files from the Internet.
  - Navigate through the UF family of websites.
  - Perform basic information searches by identifying and using search engines.
- Ability to perform basic information searches:
  - Understands common security protocols related to Internet use.
  - Ability to identify pop-up windows and links to probable malware sites.
  - Can configure Browsers so as to block or allow pop-up windows and software downloads.
  - Understands the function of cookies.
  - Recognizes secure transaction sites and understand what type of activities are conducted there.
  - Understands and applies the library's computer and Internet usage policies (privacy, security).

Level 2
- Ability to perform Internet tasks including:
  - Demonstrate familiarity with a variety of search strategies (keyword, Boolean operators).
  - Identify and use search engines, Web directories and online databases.
  - Evaluate information for quality and credibility.
  - Ability to locate LibGuides and suggest changes/corrections as needed.
  - Ability to use the Institutional Repository (IR) self-submittal tool.

Level 3
- Understands and uses common social networking and online collaboration tools and ability to:
  - Locate and follow information sources to stay informed of new technologies and social tools.
  - Identify and use help menus, tutorials and support communities to acquire necessary skills.
  - Locate and read blogs and listen to podcasts.
  - Where applicable to position, demonstrate familiarity with social networking sites and instant messaging tools (Microsoft Office Communicator, Google Talk, Meebo, Windows Messenger, Yahoo! Messenger, Skype, AIM).
  - Where applicable to position, familiarity with micro-blogging platforms (Twitter, Tumblr, FriendFeed)
  - Where applicable to position, familiarity with sites relating to photo-sharing (Flickr), music-sharing (iTunes) and video-sharing (YouTube).
  - Demonstrate familiarity with online files-sharing and collaboration tools (Wikis, Google Docs, Slideshare, Google Wave, Prezi).
  - Use web-conferencing programs for online meetings or learning.

Level 4
- Demonstrate familiarity with RSS and uses feed readers or other means to manage feeds.

Level 5
- Where applicable to position, demonstrates familiarity with the Apple and Android app stores.
- Where applicable to position, is able to use web-editing tools such as Adobe Contribute and Dreamweaver.

CORE SOFTWARE APPLICATIONS

Level 1
- Ability to perform routine tasks such as:
    - Create, save, retrieve and delete documents.
    - Use help feature to locate instructions on how to perform an unfamiliar task.
    - Perform basic editing such as changing font type, size, color and highlighting.
    - Select, cut, copy and delete text.
    - Print documents
        - Page settings, configuring
        - Print configuration

- Word Processing:
  Ability to perform basic tasks including:
    - Change margins, tabs and indents.
    - Insert a bulleted and numbered list.
    - Insert clip art and pictures into a document.
    - Insert a table into document.
    - Use the thesaurus and spell checker to change words in document.
- Spreadsheet:
  Ability to perform basic tasks including:
    - Create a basic formula.
    - Use the AutoSum feature.
    - Adjust print settings to create page breaks where needed.
    - Insert and delete rows or columns.
    - Insert and delete sheets.
    - Apply currency, date, percent and comma styles to cells.

Level 2
- Word Processing:
  Ability to perform tasks including:
    - Create and edit tables.
    - Move, resize, and delete pictures.
    - Change font, highlight and underline text.
    - Use Help features to locate instructions on how to perform an unfamiliar task.
    - Insert, edit and delete text box.
    - Print/convert to PDF.
- Spreadsheet:
  Ability to perform tasks including:
    - Arrange multiple spreadsheets on one page.
    - Format headings, page layout and lines.
    - Insert charts and illustrations.
    - Create a hyperlink to sheets in the same folder and outside.

Level 3
- Word Processing:
  Comfortable with the following procedures:
    - Perform a mail merge.

- o Use styles to create a table of contents.
- o Insert headers and footers.
- o Use the citations and bibliography features.
- o Track notes.
- o Use documents to store images.
- o Use markup to track changes and share document edits.
- Spreadsheet:
    Comfortable with the following procedures:
    - o Use mathematical symbols and the formula bar.
    - o Adding header and footer to spreadsheet.
    - o Merge and unmerge cells.

MS ACCESS

Level 1
- Ability to do data entry in specified format; Ability to audit entered items and correct as necessary; Ability to mirror data represented in other systems within database.

Level 2
- Ability to generate meaningful reports from all data entered into database.
- Send data to word or excel for further use.

Level 3
- Ability to create new databases according to set standards and expected needs for output.

CORE IT SECURITY PRACTICES

*Level 1
- Workstation:
    - o Practices password security and change as required.
    - o Follows directive to not share log on ID or password with others.
    - o To prevent unauthorized use, password protect or locks workstation if out of the area.
    - o Ensures external drives (USB, hard drive, floppy, etc.) shared from other sources or workstations are scanned for viruses before opening stored files.
- Online Utilization:
    - o Understands the purpose of anti-virus and anti-spam software.
    - o Authenticates attachments or web links before opening.
    - o Is aware of pop ups, malware and fake virus alerts.
    - o Ensures web pages are secure before entering personal/private/secure data.
    - o Uses secure servers (such as a VPN if available) when accessing external network resources.
    - o Ensures compliance to UF AcceptAbility Use Policy.
    - o Uses online knowledgebase on safe security practices provided by the UF IT Security Team.

Level 2
- Workstation:
    - o Identifies icons on task bar for problems/required updates.
    - o Familiarizes self with virus scan software and its functionality.
    - o Identifies and seeks removal of any unauthorized hardware and/or software.
- Online Utilization
    - o Identifies and seeks removal of restricted data from public access.
    - o Keeps all software on current versions and verify compatibility with current system configuration.
    - o Ensures that everyone who interacts with or comes into contact with restricted data is trained on appropriate use, management and protection.
    - o Maintains staff compliance to UF AcceptAbility Use Policy.

II - AREA-SPECIFIC COMPETENCIES

PUBLIC SERVICES COMPETENCIES

CIRCULATION
Level 1
- Ability to answer all basic and/or frequent circulation questions without referring to another staff member.
- Ability to check a book in and out.

Level 2
- Ability to answer all basic and/or frequent circulation questions and some advanced questions without referring to another staff member.
  - Ability to view and explain information contained in the Patron and Items tabs of the Circulation Module.
  - Ability to view, explain and help place holds for a patron.
  - Ability to activate Gator-1 cards.
  - Ability to look up a patron's status in both PeopleSoft and ALEPH and create and/or update a patron record.
  - Ability to explain rules for proxy borrowers and activate a proxy borrower account.

Level 3
- Ability to answer all basic and advanced circulation questions without referring to another staff member.
- Ability to process problem reports.
- Ability to answer all questions relating to fines and billing.
- Understands the billing process and ability to assess input, credit and waive fines and fees in PeopleSoft.

INFORMATION AND RESEARCH ASSISTANCE
Level 1
- Ability to politely answer basic directional questions.
- Ability to look up items using the library catalog and assist the patron in locating that material.

Level 2
- Ability to answer most reference questions and who to refer all other questions to.
- Ability to refer patrons to subject specific databases within and outside of their branch's subject area.
- Ability to answer questions relating to all common subject databases within a branch.
- Familiarity with RUSA Guidelines for Behavioral Performance of Reference & Information Service Providers.

Level 3
- Ability to answer more in depth questions relating to specialized features within databases and specialized reference software and resources within one's branch.
- May serve as a subject specialist in a specific area.

INTER-LIBRARY LOAN
Level 1
- Knowledge of basic Interlibrary Loan policies and ability to help patrons using the Interlibrary Loan Web site (ILLiad); ability to inform patron of the status of their ILL request by searching ILLiad.

Level 2
- Ability to assist with Interlibrary Loan processing such as paging materials, scanning articles and preparing materials for shipping.
- Ability to open and sort incoming mail for ILL.

Level 3
- **Borrowing/ Document Delivery**
  - Ability to perform basic functions in the ILLiad client.
  - Ability to use intermediate searching skills in OCLC to locate requested materials and verify patron submitted citations.

- o Processes incoming and outgoing items and updates the status of the request in the ILLiad client, providing tracking of the request within the system.
- o Follows Books on Demand guidelines to create orders and create brief MARC records in Aleph.
- **Lending**
  - o Ability to perform basic functions in the ILLiad client.
  - o Ability to search local catalog for library locations and availability of lending requests.
  - o Print pull slips and organize pulling of materials at various branches.
  - o Update ILLiad and Aleph when sending out materials.
  - o Process Resend requests.

Level 4
- Liaison with other university ILL offices.
- Ability to communicate effectively with patrons concerning all aspects of the ILL system.
- **Borrowing/ Document Delivery**
  - o Ability to perform advanced functions in the ILLiad client (including resolving Special Messags.)
  - o Knowledge of Interlibrary Loan copyright policies and procedures.
  - o Involved in Interlibrary Loan troubleshooting and decision-making.
- **Lending**
  - o Ability to perform advanced functions in the ILLiad client (including resolving Special Messages).
  - o Manages ILL billing.
  - o Manages ILL billing via ILLiad Billing Manager on a monthly basis.
  - o Communicates with borrowing libraries regarding overdues.
  - o Keeps track of overdue items; verifies overdue status.

Level 5
- Ability to customize ILLiad software.
- Ability to run reports within ILLiad.
- Plays a role in Interlibrary Loan policy formation and documentation.

COURSE RESERVES

Level 1
- Ability to assist patrons with locating course reserve items using Ares.
- Ability to explain the basic process of setting up an Ares account and placing items on reserve.

Level 2
- Ability to assist with course reserve processing such as scanning, paging and labeling.
- Ability to make minor item record adjustments in Aleph.

Level 3
- Advance knowledge of Ares client (including pacing and editing items on reserve in multiple formats as well as creating, cloning and editing classes).
- Ability to catalog professor's personal copies in Aleph.
- Ability to effectively communicate with faculty concerning all aspects of the course reserve system.
- Make decisions based upon course reserve copyright policies.
- Ability to conduct advanced searches when locating requested items.

Level 4
- Conducts Ares training for faculty and library staff.
- Troubleshoots Ares client with Atlas systems representatives.
- Ability to manage Ares software.
- Assists with Ares policy formation and documentation.
- Handles Grover requests concerning Ares client, ability to access Ares database reports.
- Monitors public Ares Web pages and creates Ares Web tutorials.

STACK MANAGEMENT

Level 1
- Knowledge of the stack layout and organization within one's department or branch.

- Proficiency in call number ordering systems within one's branch.
- Ability to put items in order, find and shelve items.
- Ability to search for lost or missing books within the stacks at one's department or branch.

Level 2
- Ability to identify and fix problems within the stacks.
- Ability to process loose-leafs.

Level 3
- Ability to plan for long term growth within the stacks.

INSTRUCTION

Level 1
- Ability to assist in a library instructions sessions and lead library orientations.
- Ability to serve as backup to the library instructor.
- Ability to answer questions from instruction participants during a session or know how to refer complicated questions.

Level 2
- Ability to plan or lead a library instruction session.
- Ability to identify topics for specific audiences.
- Ability to modify course material based on needs of the group and feedback.

Level 3
- Ability to create and lead a bibliographic instruction session as a subject specialist.
- Ability to create subject specific online guides and finding aids.

POLICIES, PROCEDURES AND REPORTS

Level 1
- Knows all basic borrowing policies and procedures regarding patron statuses.
- Ability to understand and calmly communicate policies to patrons at service desks.
- Knowledge of and ability to answer questions regarding public computing, printing, and copying.

Level 2
- Possesses knowledge of all advanced policies and procedures and ability to implement them. Knowledge of what standard reports the library receives.
- Understands what notices are sent out to patrons on a regular basis.
- Ability to interpret circulation reports.

Level 3
- Ability to run circulation reports on an as needed basis.

Level 4
- Mastery of all advanced circulation policies and procedures and knowledge of all circulation reports run on a regular basis.
- Ability to weigh in on and create new policies and policy revisions.
- Ability to train others on new policies.

CATALOGING

CATALOG MANAGEMENT

Level 1
- Understands the core purpose of catalog and the needs of users.
- Understands the purpose of the OPAC.
- Understands the structure and interrelationship of the parts (bib, holdings, and item) of an Aleph record.
- Understands access points and their importance for users.

AUTHORITY RECORDS

Level 1
- Understands the purpose of authority records.

- Ability to determine from an authority record whether a heading is correct, how it is classed, etc.
- Ability to make simple corrections of headings in the bib record based on information in the authority record.

Level 2
- Ability to create original series authorities for series without LC authority records for the national database through the NACO program with review.
- Ability to readily identify problems and works with Authority and Database Maintenance Unit to resolve problems with all types of authority records.

Level 3
- Ability to create original name authority records for the national database through the NACO program with review.
- Ability to identify the need for new or changed LC Subject Headings and refer for submission through the SACO program.

Level 4
- Ability to create original name authority records for the national database through the NACO program without review.
- Understands when annotation of all types of authority records is necessary and ability to carry out the modifications in the local authority database.
- Ability to resolve complex authority problems.

LIBRARY OF CONGRESS CLASSIFICATION AND SUBJECT HEADINGS

Level 1
- Understands what LC classification is and the linkage to LCSH (Library of Congress Subject Headings).
- Ability to recognize when a call number is incomplete or in an incorrect form.
- Knows how to check whether LCSHs are correct via OCLC control headings functionality.

Level 2
- Understands in a general way the correspondence between LC (Library of Congress) class numbers and LCSH.
- Ability to recognize when a call number is incomplete or in an incorrect form.
- Knows how to check whether LCSHs are correct beyond the basic OCLC control headings functionality.

Level 3
- Ability to create full call numbers by inspection of item or subject analysis.
- Has a detailed understanding of LC call number SH correlation.
- Ability to add call numbers to a Connexion record and replace the master record in OCLC.

SEARCHING

Level 1
- Understands the difference between a keyword and a browse search.
- Ability to determine when one type of search is preferred to another.
- Ability to search in Aleph, Connexion and the OPAC (online catalog).
- Understands the relationship between indexed fields and searching.

MONOGRAPHIC CATALOGING

Level 1
- Ability to make a limited number of modifications to item records.
- Ability to make minor changes to bibliographic and holdings records.
- Ability to create a brief provisional record from a template.

Level 2
- **Basic copy cataloging of DLC/PCC print material:**
  o Ability to match item in hand to bibliographic record and evaluate the accuracy and completeness of the existing access points.
  o Understands how to create holdings and items for single copies, multiple copies, simple volume sets and some types of supplemental material.
  o Ability to do basic editing of the bib and holdings with close supervision.
- **MARC and AACR2:**
  o Understands the basic use and coding of the most common MARC fields.

Level 3

- **Shared copy (with call number) print and most types of non-print material**:
  - o Understands the differences between records for different material formats (007s, etc).
  - o Ability to create monographic holdings with multiple levels of enumeration, gaps, supplementary material, etc.
  - o Ability to add a few access points such as 246 to local records without supervision.
  - o Creates local series authority records when necessary for numbered series.
  - o Ability to do simple troubleshooting of bibliographic records (e.g., need for local notes, common fields missing, etc.)
  - o Understands the differences between serial records & multi-volume, monographic set records.
- **MARC and AACR2:**
  - o Has some basic knowledge of AACR2 allowing detection of a limited number of common problems.

Level 4
- **Shared copy without call number for most formats**
  - o Ability to troubleshoot and fix a large number of potential problems in monographic bib, holdings and items without supervision.
  - o Ability to derive SHs under supervision.
  - o Understands when to make permanent changes to the OCLC master record for specified types of corrections/additions.
  - o Ability to accurately add any access points deemed necessary by cataloger without supervision.
  - o Ability to upload some locally created originals to OCLC with review, troubleshooting when necessary.
- **MARC and AACR2**:
  - o Understands the use and coding of all regularly encountered MARC fields or ability to research the field without help.
  - o Has very good knowledge of AACR2, ability to detect problems and correct or refer them.
  - o Can research AACR2 rules when necessary.

Level 5
- **Original cataloging**
  - o Ability to create original bibliographic records (w/ review) for all monographic formats and in all subjects in most languages in Connexion.
  - o Ability to provide subject analysis appropriate to content.
  - o Ability to upgrade a record in OCLC to a higher encoding level, such as K to I.
  - o Contributes Lvl.4 and full level PCC quality records as part of the Program for Cooperative Cataloging.
  - o Ability to work in a wider range of databases such as AGRICOLA.
- **MARC and AACR2**:
  - o Full command of MARC format, creating original records for a wide range of types of material.
  - o Has excellent understanding of AACR2 rules and ability to apply them in original cataloging of material.

Level 6
- **Original cataloging**
  - o Ability to create original bibliographic records (w/o review) for all monographic formats and in all subjects in most languages in Connexion.
  - o Ability to coordinate with other units and departments on specialized projects.

DATABASE MAINTENANCE

Level 1
- Understands procedures for the withdrawal and transfer of items owned by the library.

Level 2
- Ability to assist with large reclassification projects, such as working with large excel files, liaising with other libraries etc.
- Ability to use GenLoad by following step-by-step directions to load small record sets.
- Ability to trouble-shoot problems with record loads using log files.
- Ability to coordinate the catalog outsourcing of titles in certain vernaculars.

Level 3
- Ability to conceptualize and build new loading profiles for file loading and deduping purposes.

- Ability to load and trouble-shoot large and/or complex record sets such as Marchive, table of contents records, e-records, etc.
- Understands when global changes are necessary in Aleph and ability to implement them.

SERIAL CATALOGING

Level 1
- Ability to work with serial holdings and add items records to existing serial records.

Level 2
- Ability to determine serial/monographic title treatment.
- Ability to do DLC/PCC and member-level cataloging of serial records.
- Ability to create serial holdings and item records with multiple levels of enumeration, gaps, supplementary material, etc.
- With limited supervision, ability to make CONSER-level enhancements to serial records in OCLC.
- Ability to do DLC/PCC and member-level cataloging maintenance of serial records in OCLC.

Level 3
- Ability to create original CONSER-level serial bibliographic records following all AACR2 and CONSER standards in Connexion with or without supervision.

WEB TOOLS

Level 1
- Ability to use on line searching and translation tools.
- Ability to use dictionaries and on line translation tools for cataloging and searching in foreign languages.

Level 2
- Ability to use OCLC Bib Formats.
- MARC code lists for language and country.

Level 3
- Ability to use LOC's Classification Web both for checking and creating LC call numbers.
- Ability to use Classification Web to check LC subject headings.

Level 4
- Knowledge of Cataloger's Desktop.
- LOC rules for creating authority rules.
- GNIS (Geographic Names Information System) for checking geographic entities.

PHYSICAL PROCESSING

Level 1
- Ability to correctly barcode, stamp, label and tattle-tape books.
- Understands procedures determining what material is sent to Preservation.
- Understands procedures for the treatment of supplemental material for different libraries.

PROBLEM SOLVING

Level 1
- Ability to utilize record history, order record and knowledge of library workflows to effectively problem solve.
- Ability to assist student assistants and other staff with cataloging-related questions.
- Ability to work with staff in other units or departments to resolve more complex cataloging problems.

WORLDCAT VIA CONNEXION CLIENT

Level 1
- Ability to do various types of keyword and numeric searches.
- Ability to do keyword searches to find authority records.
- Ability to update a record and export it from Connexion to Aleph.
- Ability to control headings.

Level 2
- Ability to use control headings function to verify and correct SHs.

- Ability to replace master record.
- Ability to batch load small sets of records from Connexion to Aleph.

Level 3
- Ability to create original records in Connexion.
- Ability to batch load large, complex sets of records from Connexion to Aleph.

PRESERVATION

BINDING

Level 1
- **Terminology**
  - In depth understanding of binding terminology including parts of a book, binding types, etc…
- **ALEPH**
  - **Acquisitions Serials** – Ability to look up periodicals by title or ISSN for binding.
  - **Cataloging** – Ability to perform binding; update ITEMS records, BIB records and Holdings; Ability to change barcodes.
  - **Circulation –** Ability to charge items out to pseudo patron cards for binding, claimed items and the RDS project; Ability to change due date on claimed items or RDS project; Ability to discharge items that have been bound; Ability to verify all items from binding shipment have been returned/discharged .

Level 2
- **ALEPH**
  - **Acquisitions Serials** – Ability to add and remove claims in ALEPH system; look up vendor information for items to claim; research and/or change patterns for frequency changes in periodical titles.
  - **Cataloging** – Ability to update item process status on duplicate copies.
  - **Circulation –** Ability to manage pseudo patron cards for binding unit staff.
- **LARS**
  - Knowledge of and ability to use LARS software in the binding process for monographs and periodicals.

DIGITAL SERVICES

DIGITIZATION FOR DIGITAL PRESERVATION (CONCEPTS AND KNOWLEDGE)

Level 1
- Knowledge of digitization processes for preservation and access.
- Understanding of the tools and methodologies employed in the digital reproduction of primary source materials.
- Understanding of proper care and custody of rare and archival materials.
- Understanding of basic Still Imaging best practices.
- Understanding of file naming conventions in the DLC (BIB_VID_Page number).
- Understanding of the DLC production workspace and the Storage Area Network, folder structure and organization.

Level 2
- Understanding of DLC work policies and student/OPS work policies.
- Understanding of Imaging's queue organization, milestones, and the workflow.
- Ability to differentiate and appropriately employ a variety of industry standard Still Image formats and processes.
- Knowledge and understanding of image packages, derivatives, and Pre-QC.

Level 3
- Understanding of DLC work policies and student/OPS work policies.
- Understanding of Imaging's queue organization, milestones, and the workflow.
- Ability to differentiate and appropriately employ a variety of industry standard Still Image formats and processes.
- Knowledge and understanding of image packages, derivatives, and Pre-QC.

Level 4

- Understanding of library, archival, and museum preservation and conservation issues, standards, trends, and best practices.
- Understanding of the theory, processes, standards and best practices of digital creation, management, storage and digital preservation.
- Knowledge of standards and typical errors found in data files and in data normalization processing, and knowledge of troubleshooting methodologies.
- Advanced knowledge of: digital and data types, file formats, and standards; digital file and data quality; and storage requirements.
- Knowledge of conversion equipment and software; legacy formats.

DIGITIZATION FOR DIGITAL PRESERVATION (TECHNICAL SKILLS AND ABILITIES)

Level 1
- Ability to properly use basic imaging equipment including flatbed and sheet feed scanners, and select from basic options.
- Ability to properly direct others to equipment in the Libraries and on campus.
- General knowledge of DLC image capture and post-capture procedures and techniques.
- Familiarity with UFDC and SMaRT internal usage.

Level 2
- Ability to carry out digital imaging processes (scanning, manipulation, image correction, and editing) while following industry standards without supervision.
- Ability to teach others basic digital imaging processes (scanning, image correction, and editing) following industry standards.
- Advanced knowledge and understanding of DLC image capture and post-capture procedures and techniques, including:
  - Ability to select appropriate target technology for digitization.
  - Ability to use Adobe Photoshop and Bridge basic functions for file type, resolution, size and optimization including Actions & Batches.
  - Ability to use Scan Tailor including proper application; using the appropriate settings for each step; post-processing conversion of LZW tiff files using Photoshop.
  - Ability to use Bulk-Rename Utility.
- Ability to monitor and perform quality control for digital production.
- Ability to monitor space on the SAN, organizing project folders by cross checking milestone status using Smart and UFDC

Level 3
- Ability to properly use an expanded variety of imaging equipment including slide scanner w/bulk loader, DLSR with lenses and lighting, large format camera, and flatbed transparency scanning.
- Ability to properly identify, select, setup, and configure special equipment and other supports (lighting, stands, glass plates, etc.).
- Ability to maintain imaging equipment for production; ability to perform initial configuration and maintain ongoing calibration (setup, operation, and basic troubleshooting of all DLC scanners).
- Ability to use a variety of digital curation tools for normalization and validation.
- Ability to prioritize projects, patron requests, digitize on demand, project affiliation and capacity.
- Ability to review, develop and apply a standardized evaluation, and select new equipment and upgrades according to requirements for digital preservation and overall workflow.

Level 4
- Ability to mediate and identify best practices for format conversion and normalization supporting digital preservation.
- Ability to automate elements of the normalization and curation process.
- Ability to develop and maintain policies and procedures to support digital curation related to different stages of the digital lifecycle.
- Ability to evaluate digital files for curation needs in terms of intent (sufficient metadata for data sets with codebooks, defined data, etc.; contextual presentation for digital files within digital humanities scholarship).
- Working knowledge of processes, standards, tools, and best practices for digital file format conversion and normalization for: digital file optimization while maintaining artifactual fidelity; digital preservation; digitization processes for specialized materials (maps for GIS).

- Ability to evaluate product and recommend vendors that adhere to standards and best practices for digital preservation, for outsourcing digitization projects.
- Ability to develop and support infrastructure needed for digital curation.
- Ability to establish normalization and curation processing as related to different materials and projects.

DIGITAL COLLECTIONS SUPPORT

Level 1
- Understanding of the principles and terminology of the Internet.
- Basic knowledge of metadata and its uses.
- Knowledge of DLC workflow and final product of digitization.
- Basic knowledge of tools used within internal and external digitization workflows.

Level 2
- Proficiency with content management and/or Web site management systems.
- Ability to apply methods and use tools (standards, Web 2.0, Web 3.0, etc.) to support search engine optimization and overall findability.
- Working knowledge of XML, XML Schema.
- Understanding of integrated library systems, bibliographic utilities, and federated, web-based platforms for sharing information about collections.
- Ability to develop and apply evaluative criteria for selecting web software.
- Advanced knowledge of content in collections and technical aspects of the system to provide support and properly direct inquiries.
- Working knowledge of relational database systems, METS and OAI.
- Understanding of schemas used for encoding digital collection resources and descriptions.

Level 3
- Working knowledge of Web-based publishing tools and coding.
- Defines and implements policies related to digital holdings (digital collections, digital preservation, rights management, etc.)
- Understanding of digital scholarship needs and ability to direct faculty to additional technologies and facilities to support research and teaching needs.
- Advanced understanding of the use of digital asset management systems and metadata for providing access to digitized primary source materials as part of the digital scholarship process and for use in teaching and research.
- Understanding of how to support digital scholarship in terms of tools, methods of production and for evaluation for tenure, collaborative partners, etc.
- Ability to maintain awareness of changes in the scholarly uses of information technology and user expectations.
- Understanding of publishing trends related to digital resources.
- Ability to investigate emerging technologies for their potential to enhance delivery of information and services.
- Ability to add and track reference transactions in LibAnswers.

Level 4
- Ability to define, select, and manage a digital asset infrastructure that supports access to digital content for research and teaching.
- Ability to establish standards and best practices to assure effective retrieval of digital content.

METADATA, OCR, & ARCHIVING

Level 1
- Ability to use UFDC's online metadata editor to edit metadata.
- Ability to match item in hand to bibliographic record and evaluate the accuracy, completeness, and access points.
- Ability to apply appropriate metadata schemas (descriptive, administrative, technical, rights, etc.).
- Ability to correct serial hierarchy for items in UFDC.
- Ability to access various types of existing metadata using various resources (Aleph, OCLC, EAD, spreadsheet, etc.).
- Understanding of concepts of Optical Character Recognition.
- Understanding of concepts related to digital library archive management.

Level 2
- Knowledge of metadata syntax and use (constructed, constructive, and actionability).
- Knowledge of spatial metadata standards and issues.
- Ability to use UFDC's online metadata editor to edit behaviors.

- Ability to properly map for ingests and ingest the metadata in a normalized format using the importer tool.
- Ability to automate processing of metadata for batch conversion and/or ingestion.
- Ability to perform OCR using a range of OCR programs such as Prime Recognition and Abby.
- Ability to apply concepts related to digital library archive management.

Level 3
- Advanced knowledge of OCR standards and vendors, and ability to specify appropriate software packages.
- Ability to show working knowledge of various applicability metadata standards (such as VRA Core, Dublin Core, MARC, EAD, MODS/METS, MADS, EAC, NACO, RDF, etc.) as applied for crosswalks and interoperability needs.
- Ability to create advanced bibliographic metadata structures from books including table of contents and indices.
- Ability to research and map new metadata standards to existing standards in use and new metadata elements as they are released in new versions of existing standards.
- Understanding of a range of metadata standards and their application in the digital library environment.
- Understanding of XML concepts and their application in the digital library environment.

Level 4
- Understanding of linked data concepts and their application in the digital library environment, and ability to link data interoperability.
- Understanding of metadata in relation to indexing for digital library systems and search engine optimization and can apply knowledge to improve metadata mappings and search engine rankings.
- Advanced working knowledge of XML, XSLT, and XML schemas (see exercise http://ufdc.ufl.edu/IR00000042/00002) and their application in the digital library environment.
- Advanced understanding of various data models (relational, entity-relationship, NoSQL/structured storage, etc.), database types, and database concepts in relation to metadata and their application in the digital library environment.

RIGHTS EVALUATION

NOTE: According to a new policy (http://guides.uflib.ufl.edu/content.php?pid=230212&sid=1904488), collection managers are now responsible for Rights Evaluation. So, this may not need to stay within the DLC core competencies.

Level 1
- Basic knowledge of privacy issues relating to digital distribution.
- Basic knowledge of copyright rules and procedures related to the Libraries and UF.
- Ability to properly refer questions to other staff as needed.

Level 2
- Understanding of and ability to apply copyright limitations related to digital distribution.
- Ability to refer or access standard sources for licensing.
- Ability to evaluate for US copyright for published materials (non-archival, published in the US).
- Ability to use standard permissions documents to clear permissions.

Level 3
- Ability to evaluate for rights and restrictions in addition to US copyright for published materials (archival materials, cultural heritage rights, moral rights, privacy, FERPA, HIPAA, informed consent and IRB approval for oral histories, donor restrictions, etc.).
- Ability to appropriately identify when to issue permissions requests to clear rights and restrictions.
- Ability to appropriately identify when, why, and for how long to postpone digital distribution to ensure rights are not violated.
- Ability to properly identify technological supports needed for associated rights (attribution requirements in records for moral rights, physical access controls for cultural heritage and donor restricted materials, etc.).

AV DIGITAL CONVERSION

Level 1
- Knowledge of basic analog equipment in digital conversion (VHS, SVHS, Betacam, Betamax, Umax, compact cassette, reel-to-reel , phonograph, turntable, legacy computer formats, etc.).
- Knowledge of the configuration of various types of analog equipment for digital conversion.
- Knowledge of audiovisual digitization best practices for digital preservation.

Level 2
- Ability to use a variety of analog equipment types for digital conversion (VHS, SVHS, Betacam, Betamax, Umax, compact cassette, reel-to-reel, phonograph, turntable, legacy computer formats, etc.).
- Ability to identify, evaluate, and select vendors for digital conversion in accordance with standards and requirements.

- Ability to implement audiovisual digitization best practices for digital preservation.

Level 3
- Familiar with microfilm standards and evaluative methods to select for digitization.
- Ability to identify, procure, maintain, troubleshoot, recommend upgrades, and recommend repair agents for analog hardware required for digitization.
- Ability to identify, maintain, troubleshoot, and recommend upgrades for other digitization hardware and software used in concert with analog equipment.
- Ability to develop, review, and maintain procedural manuals.
- Ability to oversee implementation of new technologies and policies for digital conversion.

ACQUISITIONS

BASIC ACQUISITIONS
Level 1
- Ability to view an order record and interpret it.

Level 2
- Has thorough knowledge of purchasing rules and practices per University and Libraries policy and adheres to these rules and practices.
- Has knowledge of different purchasing methods and their correlating workflows.
- Understands the difference in material types acquired by Acquisitions department and has basic knowledge of correct workflow for processing each.

Level 3
- Creates orders and/or subscriptions; creates invoices within financial management system(s); receives, processes, and/or redirects purchased material as appropriate.

Level 4
- Manages ordering of specified material type, including creating new workflows as necessary.

ACQUISITIONS ACCOUNTING
Level 1
- Has functional knowledge of general accounting concepts, including basic bookkeeping skills, cash disbursement accounting, and accounts payable.
- Also has a functional knowledge of deposits and prepayments, (what these are and how they work in terms of rules for expenditures).
- Has knowledge of accounting reconciliation and follow-up procedures, including adherence to fiscal year deadlines.
- Thoroughly understands and adheres to best accounting practices of Libraries, University, and state.

Level 2
- Makes payments and adjusts individual budgets in adherence with rules within financial management system(s); transfers funds within financial management system(s).
- Has functional knowledge of UF purchase card reconciliation and approval procedures.
- Has functional knowledge of journal entry procedures in Peoplesoft.
- Ability to assign appropriate (PeopleSoft) budget code to invoices within other financial management system (ALEPH).

Level 3
- Has deep knowledge of trends in materials pricing and inflation, as well as the ability to successfully apply this knowledge when projecting expenditures for upcoming years.
- Ability to merge data from multiple sources to produce meaningful reports as scheduled or on demand.
- Ability to identify and correct accounting problems in Peoplesoft and Aleph.

- Ability to develop an infrastructure for a budget system and add to or adapt it as necessary.
- Manages all materials allocations as represented in financial management system.

ACQUISITIONS PEOPLESOFT ACCOUNTING

Level 1
- Ability to retrieve images of invoices. Ability to retrieve balances of appropriation, DSR, foundation and grant budgets.
- Ability to assign charges to designated budgets, and to reassign charges as necessary.
- Ability to reconcile payments as represented in other accounting systems.
- Ability to facilitate vendor creation within PeopleSoft.

Level 2
- Ability to reconcile expenditure and budgeting data from Aleph with budget in PeopleSoft.
- Ability to use intersecting data from multiple accounting systems to generate up-to-date reports about budgeting and expenditures across all allocations.
- Ability to troubleshoot and correct inaccurate or missing data.
- Ability to perform all tasks outlined in "intermediate" section.

ACQUISITIONS E-RESOURCES

Level 1
- Has knowledge of electronic resource types, licensing, and payment methods.
- Ability to retrieve title metadata, including license, order and payment data, from OPAC, ERM, vendor database, or ILS using basic bibliographic fields.
- Ability to access electronic resources through OPAC, public interface, or appropriate vendor administrative platform.
- Ability to retrieve basic e-resource budget information using ERM, shared worksheet, web report or ALEPH.

Level 2
- Ability to interpret terms of licensing for e-resources for other staff and patrons.
- Ability to describe electronic resources, their metadata, and associated statistics--in the OPAC (via ALEPH) as well as in other resource management solutions.
- Ability to express licensing data in appropriate database.
- Perform link-checking functions.
- Ability to create, authorize, and update orders in vendor databases, as well as export title and order data; Ability to update local information as represented in vendor databases.
- Ability to run basic reports in vendor databases.

Level 3
- Has a deep knowledge of terms of licensing for electronic resources, and reviews all new license agreements entered into by the Libraries.
- Ability to troubleshoot and resolve problems occurring with access to any subscribed electronic resource.
- Acts as a liaison to e-resource vendors and service providers.
- Has an expansive technical knowledge, and applies this knowledge with cross walking of data, as well as implementation and management of technologies such as ERM and other appropriate solutions.
- Maps vendor- and service-provider database information to local database(s), and vice versa; Ability to run complex reports in these databases to provide detailed statistics on demand.
- Ability to liaise with vendor and service-provider representatives to troubleshoot and correct any problem encountered.

ACQUISITIONS MONOGRAPHS

Level 1
- Knowledge of different types of monographic material and appropriate workflows for each; Ability to search for individual titles using any number of basic MARC fields to retrieve bibliographic, holdings, and order data.
- Ability to retrieve basic monographic budget information using web report and/or ILS.

- Ability to post invoices and arrive incoming material in accordance with proper workflow by material type.
- Ability to process incoming shipments, applying appropriate workflows and routing by material type, location, and acquisition method.
- Ability to identify and route items with shelf-ready problems, correcting the problems when appropriate.
- Ability to search and "tag" titles in vendor databases for ordering, applying appropriate order information.
- Ability to retrieve and interpret order/approval and invoice information in vendor databases.

Level 2

- Ability to create bibliographic, order and item records for new requests.
- Ability to determine appropriate choice of vendor, method of acquisition for incoming requests, and create new orders (with vendors and within ILS). Ability to create, authorize, and update orders in vendor databases; Ability to update ILS order information in response to vendor order status updates.
- Ability to run basic reports in vendor databases.
- Ability to complete claiming procedures with vendor and represent (updated) order status in ILS.
- Ability to problem solve basic issues relating to orders.
- Ability to process domestic and international returns.

Level 3

- Ability to manage rate of purchasing and receipt for approval and firm order material, and report to subject selectors and others as appropriate.
- Ability to problem solve any incoming request or existing order.
- Ability to create and integrate new workflows and projects with existing workflows.
- Ability to compile reports of monograph acquisitions by material type, vendor, and budget, and present reports as needed or scheduled.
- Ability to run or request complex reports in Vendor databases to provide detailed statistics on demand.
- Ability to liaise with vendor and service-provider representatives to troubleshoot and correct any problem encountered.
- Ability to conduct training for procedures as needed and create/update workflow documentation.
- Ability to record and report appropriate Libraries, University, and ARL statistics.

ACQUISITIONS PRINT CONTINUATIONS

Level 1

- Has knowledge of basic serial/standing order record architecture, including items attached to bibliographic record, subscription, and holding with established pattern.
- Ability to reconcile arrival of physical issues/items within ILS.
- Ability to retrieve basic continuations budget information using web report and/or ILS.
- Ability to create patterns and arrive/add issues/items on existing records within ILS.
- Ability to identify missing issues/items and follow claiming procedures.
- Ability to process incoming continuations shipments and invoices, applying appropriate workflows by material type and location, and route accordingly.
- Ability to retrieve and interpret order/approval and invoice information in vendor databases.

Level 2

- Ability to determine if payment for continuations invoices is appropriate, and post invoice in ILS when needed.
- Ability to identify appropriate choice of vendor and method of acquisition and create orders and new subscriptions (with vendors and within ILS) for incoming requests.
- Ability to perform title and frequency changes.
- Ability to create and update orders in vendor databases; Ability to update ILS order information in response to vendor order status updates.
- Ability to run basic reports in vendor databases.

Level 3

- Ability to compile, combine, interpret data to produce meaningful statistical reporting.
- Ability to record and report appropriate Libraries, University, and ARL statistics.
- Ability to troubleshoot and correct any issue related to the acquisition of serials/standing orders.
- Ability to run or request complex reports in Vendor databases to provide detailed statistics on demand.
- Ability to liaise with vendor and service-provider representatives to troubleshoot and correct any problem encountered.
- Ability to create and integrate new workflows and projects with existing workflows. (Needs clarification? Maybe cross off the work acquisitions and then would apply).

ALEPH FOR ACQUISITIONS

Level 1
- Ability to successfully use title and order search functions; Ability to interpret status of order and broadest level of order data.
- Ability to differentiate material type by order, (serial, standing order, monograph).
- Ability to search for and interpret budget and vendor records in ILS.

Level 2
- Ability to pay invoices on existing order records and create new order records on existing records, as necessary.
- Understands all fields of order record, subscription structure, and invoice creation.
- Has basic understanding of underpinning architecture of records, (orders, items, bibs, holdings) in ILS.
- Ability to correct line items in invoices.
- Ability to determine circulation status of items and mark items as lost/bill patrons when appropriate.
- Ability to run basic reports and services using step-by-step instructions in ILS.

Level 3
- Has a deep knowledge of the connection between constituent parts of record in ALEPH, (order, item, holding, bib) and easily manipulates, adds, and removes data as needed; has high functional knowledge of reporting and acquisitions services.
- Ability to load EDI invoices.
- Ability to problem solve and troubleshoot any problem with data found in Acquisitions module.
- Ability to run complex/customer reports and services.

CATALOGING FOR ACQUISITIONS

Level 1
- Understands the difference between level and status of records, and knows basic fields in MARC records. Ability to retrieve records from the data in basic MARC fields as well as in TKR fields in a bibliographic record.
- Ability to retrieve bibliographic records using ALEPH cataloging module and identify basic fields, (title, author, ISBN).
- Knows departmental coding of local fields, (TKR and note fields).
- Ability to edit basic MARC data (holdings information and some fields of bib record), as needed.

Level 2
- Ability to create brief MARC records and adjust basic fields in existing (provisional) MARC records. Ability to add items and/or provisional HOL records as needed.
- Ability to create provisional bibliographic records with MARC coding and create or link appropriate aspects of record, (item, order).
- Ability to identify and correct duplicative records.

Level 3
- Ability to load batches of vendor-supplied MARC records and OCLC-supplied MARC records; Ability to add data to existing MARC records to bypass Cataloging workflow, which may include (1) creation of patterns and updating of HOL records for serials, (2) creation of new item and HOL records for added monograph copies, and/or (3) embedding URLs in bibliographic record in appropriate field for e-resources.
- Ability to create bibliographic records, create and edit holdings information, and move components of records as needed.

- Ability to problem solve issues with cataloging records, working with members of the Cataloging department.

Level 4

- Ability to use ALEPH batch record loading services and understands underlying architecture of data table to provide information for updates, as necessary.

GENLOAD FOR ACQUISITIONS

Level 1

- Ability to use program by following step-by-step how-to documentation to either load MARC records into ILS or to check file of titles for duplicates.

Level 2

- Ability to load MARC records using software and also interpret log files to correct errors/omissions.

Level 3

- Ability to use GenLoad for purposes outlined in "fundamental" and "intermediate" columns.
- Ability to conceptualize and build new loading profiles for MARC file loading and deduping purposes.

FISCAL SERVICES

ACCOUNTING

Level 1

- Has functional knowledge of general accounting concepts, including basic bookkeeping skills, cash disbursement accounting, account payable and accounts receivable.
- Understands and adheres to Library, University and state rules governing accounting practices.
- Functional knowledge of deposits and refunds.
- Basic knowledge of fiscal office procedures and adherence to deadlines.

Level 2

- Ability to initiate financial transactions in PeopleSoft.
- Ability to assign appropriate chart field information for processing financial transactions.
- Ability to reconcile monthly fund balances.
- Create spreadsheets for use in tracking financial data.
- Familiar with department budgets and fiscal resources for daily operational transactions.

Level 3

- Ability to create multiple financial budget spreadsheets.
- Ability to prepare financial reports.
- Ability to identify and resolve accounting problems.
- Ability to create accounting journal entries.
- Liaison with UF fiscal personnel.
- Ability to create financial histories, income projections.
- Recommend internal operating procedures.
- Ability to communicate changes in policy/procedure with other fiscal department staff.

Level 4

- Ability to organize, prepare and communicate budget information.
- Ability to prepare budget forecasts.
- Ability to analyze financial data and create financial history information.
- Ability to process budget transfers.
- Ability to make funding decisions.
- Ability to develop policies and procedures in accordance with Library and University rules and regulations.
- Supervise fiscal office staff.
- Provide training to fiscal office staff.
- Financial resource to library department administrators and library deans.
- Liaison with UF Budget Office staff and other Campus Administrators.

GRANTS

Level 1
- Basic knowledge of UF grant management rules and regulations.
- Ability to track grant expenses.
- Understand grant budgets and corrections to budget allocations.

Level 2
- Ability to reconcile monthly expenses.
- Ability to create spreadsheets for financial reports.
- Liaison with Grants Manager and P.I. to create budget proposal.
- Ability to create expense projections, i.e. salary and ops.
- Ability to prepare cost sharing budgets.
- Liaison with library HR for verification of P.I. effort reporting on grant activities.

TRAVEL

Level 1
- Basic knowledge of Library, UF and State travel rules and regulations.
- Ability to enter travel authorizations and expense reports in PeopleSoft with correct funding source.
- Provide training to library staff of procedures and in entering transactions.

Level 2
- Assist Library Travel Committee in distributing all staff development travel funds.
- Reconcile monthly travel transactions with ledgers.
- Provide training to library staff .

PAYROLL

Level 1
- Basic knowledge of payroll rules and policies as directed by Library and UF.
- Basic knowledge of fiscal office procedures and adherence to fiscal deadlines.
- Ability to train other library staff in entering hourly and elapsed time in PeopleSoft.
- Ability to distribute employees to correct funding source.
- Ability to create spreadsheets to track salary expenses.

Level 2
- Ability to correct payroll errors using the Manager Exceptions in PeopleSoft.
- Ability to generate the Leave report for time discrepancies of over and under payments.
- Liaison with Department Administrators to resolve payroll issues.
- Knowledge of Salary funding sources and able to create financial payroll histories.

Level 3
- Ability to create journal entries to correct salary discrepancies and errors.
- Ability to reconcile monthly fund balances.

PURCHASING

Level 1
- Has basic knowledge of purchasing rules and practices for purchase orders and UF P-cards transactions per University and Library policies.
- Has basic knowledge of fiscal office procedures and adherence to fiscal deadlines.
- Ability to create purchase requisitions in PeopleSoft using correct funding source.
- Review shopping carts in My UFMarket for appropriateness of purchase.
- Ability to use purchasing Grover tracking system.

Level 2
- Ability to process Change order requests to existing purchase orders.
- Ability to research for discounted values for library purchases.
- Liaison with library departments for ongoing procurement/pcard training.
- Liaison with UF purchasing office for resolution of all procurement issues.
- Create purchase requisitions for annual maintenance agreements.

Level 3
- Reconcile monthly encumbrance report.
- Understand and initiate contract agreements, Invitation to Bids, Request for Proposals, and Sole Source documents.
- Coordinate new hire moves with library HR office, counseling new employees with move process within allotted budget.

GLOSSARY

1. AACR2 (Anglo-American Cataloging Rules, 2nd ed.) AACR2 is published by the American Library Association in conjunction with two other organizations. AACR2 provides guidelines for the description of virtually all types of library material as well as for the provision of access points for the material.

2. AGRICOLA (AGRICultural OnLine Access) is a database created and maintained by the United States Department of Agriculture. The database serves as the catalog and index for the collections of the United States National Agricultural Library, but it also provides public access to information on agriculture and allied fields (Source: Wikipedia).

3. ALEPH is the Library Management System (LMS; also known as an Integrated Library System, or ILS) produced by the company Ex Libris.

4. ARL Statistics (Association of Research Libraries Statistics) Members (UF is a member) of ARL are required to submit a set of predetermined statistics annually. The statistics are availability to member institutions.

5. Ares is software used to manage library reserves functions; this software, produced by Atlas Systems, is external to the ALEPH Library Management System (LMS).

6. Authority and Database Maintenance Unit is a unit within the Cataloging and Metadata Department. The unit manages the transfer and withdrawal of library materials. It also coordinates large (>1,000) reclassification projects. The unit oversees the maintenance of the catalog's name, series and subject heading authority records. I also participates in loading large bibliographic file

7. CONSER- Level (Cooperative Online Serials) CONSER is a cooperative serials cataloging program that provides a source of high quality documentation and training materials for the cataloging of serials and the input of serial records. It also promulgates standards related to serials. CONSER level bibliographic records are generally considered among the best availability. UF is a member of CONSER and regularly contributes new records.

8. DLC/PCC (PCC=Program for Cooperative Cataloging). DLC is the OCLC code for the Library of Congress. Records created by the Library of Congress are considered to be the highest quality bibliographic records availability. The PCC is an international cooperative effort to provide high quality monographic bibliographic records, meeting mutually agreed upon standards. PCC level records are considered to be, at or near the same quality as those created by the Library of Congress. UF is a member of the PCC and regularly contributes new records.

9. DSR is the Division of Sponsored Research, an office at the University of Florida that provides annual support to the University of Florida Libraries

10. EDI (Electronic Data Interchange) is the transmission of data in format adhering to certain standards, and is often used as a prefix to describe electronic functions in libraries, (e.g., EDI invoicing as synonymous with loading electronic invoices in standard data format into the Library Management System (LMS).

11. GNIS (Geographic Names Information System) The GNIS is a database that contains name and location information about more than 2 million physical and cultural features located throughout the U.S. and territories. This database is used by catalogers when creating authority records for geographical names or simply for checking the accuracy of a geographic name.

12. Grover is the online system used to process IT, Facilities and Purchasing requests.

13. HOL Records The holding record is one of three discreet parts of an Aleph record. It is linked to both the item and the bibliographic record, serving as a kind of bridge between them. It contains the call number, owning location and copy number of a given item. It also provides information about volume set holdings and accompanying supplemental materials.

14. ILLiad is software used to manage library interlibrary loan functions; this software, supported by OCLC, is external to the ALEPH Library Management System (LMS).

15. ILS stands for Integrated Library System, which is often used interchangeably with Library Management System (or LMS). An ILS is composed of a number of relational databases with one or more graphical user interfaces (GUIs). The ILS/LMS is the system the library uses to track internal functions, (purchasing, subscription management, cataloging of material) as well as external functions, (circulation of materials, searching of library collections).

16. LC or LOC – Library of Congress

17. LCSH (Library of Congress subject headings) comprise a thesaurus (in the information technology sense) of subject headings, maintained by the United States Library of Congress, for use in bibliographic records. LCSHs are applied to

most items within a library's collection, and facilitate a user's access to items in the catalogue that pertain to similar subject matter.

18. LOC Rules are generally synonymous with AACR2; however, local decisions made by the Library of Congress often have broad implications for other libraries. LOC rules are often meant to encompass both.

19. MARC (Machine-readable cataloging) The **MARC standards** consist of the MARC formats, which are standards for the representation and communication of bibliographic and related information in machine-reaable form. It provides the protocol by which computers exchange, use, and interpret bibliographic information. Its data elements make up the foundation of most library catalogs used today.

20. NACO Program (Name Authority Cooperative Program) NACO is the name authority component of the PCC. Program participants contribute authority records for names, uniform titles, and series to the LC/NAF (Library of Congress/National Authority File). UF is a contributing member of NACO.

21. OCLC (Online Computer Library Center) OCLC is a nonprofit, membership-based library service organization. It maintains an enormous database of bibliographic records for U. S. and international libraries. More than 71,000 libraries participate. Besides the bibliographic database, OCLC provides many other services such as WorldCat that is widely used for searching.

22. Connexion is the software used to search, export, catalog, and create bibliographic as well as search and create authority records. Connexion is one of the most important and frequently used cataloging tools.

23. OPAC (Online Public Access Catalog) is an online database of materials held by a library or group of libraries. In short it is simply the catalog. Endeca/Mango is our OPAC.

24. PeopleSoft – Human resources and accounting software used by the University of Florida

25. RDS (Retrospective Dissertation Scanning) Project. Paper format of dissertations from UF alumni are moved through the digitization process with the end result of there being a digital copy located in the DLC collection

26. SACO (Subject Authority Cooperation Program) SACO provides a means for libraries to submit subject headings and classification numbers to the Library of Congress via the Program for Cooperative Cataloging (PCC). Unlike NACO and PCC, SACO submissions are extensively reviewed before allowing the addition of a new subject heading or LC call number.

27. SH (subject heading – see LCSH)

28. TKR is a special type of note field used in Aleph. The TKR indexes as a heading so can be retrieved via a browse search allowing the searcher to easily find all records with a particular TKR. The TKR is widely used in bib records for special notes (especially to identify records as members of a set) and less frequently in the holdings record.