Smathers Libraries Core Competencies Index

An Overview

Smathers Libraries
Core Competencies Index

Agenda

- Vision and Purpose

- Process

- Review Basics

- Next Steps

Vision and Purpose

Background and information on the general concept of competencies

Vision and Purpose

Background and history on the benefits of core competencies at Smathers Libraries

- Training
- Goal Setting
- Recruiting
- Self Directed Professional Development
- Common Language

Vision and Purpose

Composition of Working Group

Member	Unit Represented
Michael Dietz	Library West
Christine Driver	Marston Science Library
April Hines	Departmental Libraries
Brian Keith	Project Head
Paul Lightcap	Acquisitions
Bobby Parker	Preservation
Patrick Reakes	Project Consultant
Bonnie Smith	Project Lead
Doug Smith	Cataloging and Metadata
Renee Weatherholt	Legal Information Center

Vision and Purpose
Working Group Charge

For Assistant and Associate positions at the Smathers Libraries:

1. Examine the literature including case studies, competencies from other libraries, best practices from professional organizations, etc.

2. Create job "families".

3. Identify key job actions within each family.

4. Name and define competencies and articulate levels of accomplishment for each.

5. Solicit input from supervisors in each area in response to initial lists of competencies identified.

6. Solicit feedback from employees throughout the libraries via focus groups.

Provide a serviceable competencies structure which includes a list of proposed competencies, competency families and accomplishment levels for review by library administration and eventual implementation into the selection, training and evaluation processes of the Smathers Libraries.

Vision and Purpose

Not currently covered by the Competencies Index but to be addressed:

- DLC
- ALF
- Special Collections
- Fiscal Services
- Human Resources
- IT
- Facilities

COMPETENCIES

Process

- Literature and review of competencies developed by other libraries

- Informal departmental reviews

- Review by Smathers Libraries Deans

- Library Council review

- Identification of fundamental competencies

Process

Fundamental competencies are all in the Cross-Departmental section - examples:

*Level 1 – Written Communication

- – Able to respond appropriately to written communications and announcements.

*Level 1 – Independence/Initiative/Problem Solving

- – Makes minor decisions and uses common sense in performing job duties.
- – Requests assistance as needed.

COMPETENCIES

The Basics

Two categories

1. Cross-departmental

   - Competencies relevant to all units
   - Includes some fundamental competencies – those required of all staff in all units (* in document)

2. Area-specific

   - Competencies relevant to a specialized area, though there may be overlap in other units or departments – ex: Departmental Libraries

The Basics

Eight Families

I - Cross-Departmental Competencies

1. Institutional
2. Professional-Interpersonal
3. Management
4. Technology

II - Area-Specific Competencies

5. Public Services
6. Cataloging
7. Preservation (Binding)
8. Acquisitions

The Basics

As many as six possible levels
within each competency

Core Software Applications - Spreadsheet

Level 1

Able 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

Able 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

Comfortable with the following procedures:
- Use mathematical symbols and the formula bar
- Adding header and footer to spreadsheet
- Merge and unmerge cells

CROSS-DEPARTMEN...
Core Software A...

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CROSS-DEPARTME[...]
Core Software [...]

> *"Keeps daily statistics. … Assists in computing monthly, quarterly and annual statistics, and maintains and complies unit statistics file for 2 service desks. 5%"*

Level 1

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Level 3

Comfortable with the following procedures:

Excel 2010 - Level 2   F 3/11/2011   9:00 AM 1 Day

- Merge and unmerge cells

AREA-SPECIFIC – PUBLIC SERVICES

COURSE RESERVES

Level 1

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

Level 2

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

Level 3

- Advanced knowledge of Ares client – Able to place and edit items on reserve in multiple formats as well as create, clone and edit classes.
- Able to catalog professor's personal copies in Aleph.
- Able to effectively communicate with faculty concerning all aspects of the course reserve system.
- Make decisions regarding course reserve copyright policies.
- Able to conduct advanced searches when locating requested items.

Area-Specific – Public Services

Course Reserves

Level 4

- Conducts Ares training for faculty and library staff (maybe training section)
- Troubleshoots Ares client with Atlas systems representatives
- Able to manage ARES software
- Assists with Ares policy formation
- Handles Grover requests concerning Ares client, able to access Ares database reports.
- Monitors public Ares web pages and creates Ares web tutorials (tech web stuff).

AREA-SPECIFIC – PUBLIC SERVICES

COURSE RESERVES

Level 1

- Able to assist pa[...]
- Able to explain [...] reserve to facul[...]

> *"Responsible for creating and updating the Reserve Collection of books and electronic media. Includes faculty communications and training. Attends training and meetings of the Reserves group as needed…25%"*

Level 2

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

Level 3

- Advanced knowledge of Ares client – Able to place and edit items on reserve in multiple formats as well as create, clone and edit classes.
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AREA-SPECIFIC – PUBLIC SERVICES

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Ares Customer Service Training: Designed to familiarize desk staff with the types of questions they are likely to face and help them develop the knowledge to be able to address these questions.

Area-Specific – Cataloging

Monographic Cataloging

Level 1

- Able to make a limited number of modifications to item records
- Able to make minor changes to bibliographic and holdings records
- Able to create a brief provisional records from a template

Level 2

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

AREA-SPECIFIC – CATALOGING

MONOGRAPHIC CATALOGING

Level 3

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

AREA-SPECIFIC – CATALOGING

MONOGRAPHIC CATALOGING

Level 4

Shared copy without call number for most formats

- Able to troubleshoot and fix a large number of potential problems in monographic bib, holdings and items without supervision
- Able to derive SHs under supervision
- Understands when to make permanent changes to the OCLC master record for specified types of corrections/additions
- Able to accurately add any access points deemed necessary by cataloger without supervision
- Able to upload some locally created originals to OCLC with review, troubleshooting when necessary

MARC and AACR2:

- Understands the use and coding of all regularly encountered MARC fields or able to research the field without help
- Has very good knowledge of AACR2, being able to detect problems and correct or refer them
- Can research AACR2 rules when necessary

Area-Specific – Cataloging

Monographic Cataloging

Level 5

Original cataloging

- Able to create original bibliographic records (w/ review) for all monographic formats and in all subjects in most languages in Connexion
- Able to provide subject analysis appropriate to content
- Able to upgrade a record in OCLC to a higher encoding level, such as K to I
- Contributes Lvl.4 and full level PCC quality records as part of the Program for Cooperative Cataloging
- Able to work in a wider range of databases such as AGRICOLA

MARC and AACR2:

- Full command of MARC format, creating original records for a wide range of types of material
- Has excellent understanding of AACR2 rules and able to apply them in original cataloging of material

Level 6

Original cataloging

- – Able to create original bibliographic records (w/o review) for all monographic formats and in all subjects in most languages in Connexion
- – Able to coordinate with other units and departments on specialized projects

Area-Specific – Cataloging

Monographic Cataloging

Level 1

- Able to make a limited number of modifications to item records
- Able to make minor changes to bibliographic and holdings records
- Able to create a brief provisional records from a template

Level 2

- **Basic cop** *"Responsible for processing new books and other materials.... 5%"*
- Able to match item in hand to bibliographic record and evaluate the accuracy and completeness of the existing access points.
- Understands how to create holdings and items for single copies, multiple copies, simple volume sets and some types of supplemental material.
- Able to do basic editing of the bib and holdings with close supervision.
- **MARC and AACR2:**
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Area-Specific – Cataloging

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- **MARC and AACR2:**
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Training - Cataloging – Searching, Basic Cataloging, Creating Holdings and Items

Area-Specific – Acquisitions

Basic Acquisitions

Level 1

- Able to view an order record and interpret it.

COMPETENCIES

Next Steps

- All staff review through departmental meetings

- Committee evaluates and integrates proposed changes to draft Index

- Final draft back to Library Council and Deans

- Roll out

- Maintenance

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Core Competencies Index

Questions?

Vision and Purpose

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