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Training the New Selector

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Training the New Selector
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This paper was written for delivery at a “Lively Lunch” at the 1998 Charleston Library Conference. It was delivered in a somewhat different form. The oral form began with an examination of the presuppositions for the written paper: that we hire experienced librarians who do not need to be told certain elementary things and that we have enough of a budget to permit the trainer to emphasize addition of resources, not the management of cancellation projects. The oral form also emphasized even more strongly the first part of the training program here, the part dealing with presuppositions. An emphasis on processes would have run afoul of differences in procedures between libraries. — TI

Last year's discussion of the role of the Collection Development Officer omitted an important topic, the training of new selectors. My own experience over seven years of training new Resource Services Librarians has taught me several things about this topic. Among them are the need to anticipate vacancies and to prepare for interim arrangements, to be followed by the orientation of a new colleague to our particular environment. Part of this process is the documentation of the programs, using — in our case — a Departmental Profile (handout 1). This form is updated by the departing librarian and kept current by myself; to guide both the interim selector and the next permanent staff member. It represents a synthetic overview of the situation, including both the librarian’s ideas and patron input.

The newly hired librarian goes through a five-session orientation. The first covers expectations and an overview of the Collection Development aspect of our “dual assignment” role in the library’s larger effort to make collections and services fit the needs of the academic community. I will dwell on this session at length in a few minutes. The second deals with monographs, including approval plans, direct orders, gifts and brittle books. The third deals with electronic products proposals, and it is the most recent addition to the program. The fourth deals with serials, especially print serials. The last session focuses on the budget structure and the overall fiscal situation of the library, as well as its calendar for budgeting and spending (handout 2). (It is intended to run parallel with an orientation by the Acquisitions Department on the means of accessing and reading fund records.) These sessions usually are spaced one a week to permit the new librarian to absorb a great deal of detail, but they can be accelerated by mutual agreement between trainer and new selector.

A lesson learned from speaking with selectors is that the need for follow-up. I now do a formal follow-up session a month later, but an open door policy encourages questions outside the formal structure of the training program. Another step being contemplated is a six-month review, informal in nature, to provide further input. Nothing in the annual performance appraisal should come as a surprise. Nor should honest errors be punished. That only discourages initiative.

Also of great importance is documentation. The new librarian is given a copy of the Collection Development Policy, Performance Appraisal Criteria (handout 3), the Calendar and a Procedures Manual. (Keeping it up-to-date in a changing environment is a major challenge.) These are accompanied by copies of the appropriate Departmental Profiles.

I want to spend most of my time here on the contents of the first session, which deals with expectations and roles. The new selector needs to know how the Collection Development Coordinator, my title in our department, does business. My own approach is fairly flexible. I expect each selector to adapt the overall guidelines to different needs. This is particularly true of a university which has two traditional, on campus colleges, Arts and Sciences and Engineering, coupled with a School of Continuing Studies, which offers its programs at academic centers located as far away as the nation’s capital and Rockville, Maryland. Furthermore, one has to accommodate the different needs of the academic disciplines and, increasingly, demands of students from all over the world for materials, especially newspapers, reflecting their own interests and cultural backgrounds. As I tell the trainee, my preference is to give them maximum leeway; but, when in doubt, they can come to bounce around ideas. Anything that sounds workable is permitted; anything which is not is given a full explanation of complicating or prohibiting factors.

The new selector must be given a clear set of expectations. The most important of these include knowing the particular public and anticipating the collections needs of that public. This philosophy places a high value on the liaison role of the individual librarian. It is necessary to know not just the needs of the faculty but those of the students, graduate and undergraduate. Lately it has meant knowing the needs of the staff for technical manuals explaining particular computer systems and applications. Time constraints do not permit constant visiting of offices or frequent attendance at seminars, but both remain useful. Most recently, I have encouraged electronic faculty liaison as a means of disseminating information of a more general nature. General messages, in turn, elicit inquiries about more particular needs. (They also can elicit complaints or suggestions about services, requests for instruction sessions and observations about our new Horizon system.)

The same service has been extended to graduate students, who appreciate being consulted and who articulate their own needs, often accompanied by editorial comments about the library.

Directly connected to the issue of expectations is that of performance appraisal. As noted above, no significant statement in an appraisal should be a surprise; but the Criteria offer something more than a checklist of continued on page 24

Please note that a version of this paper was delivered at the 1998 Charleston Conference. — KS

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there are still issues to address: • We need to talk to vendors to provide further processes such as item records, books for other collections and at other sites; • The classification policy has not yet included law and computing, more negotiation needed to simplify instructions to vendors; • “Machine” alternatives to Library of Congress subject headings need to be investigated; • Staff training in new working practices and in quality control, so that good standard records are acquired, with errors in classification able to be identified. In the future we need to extend the process to the majority of library materials. At that stage we will need to reevaluate and redefine the system so that all books arrive fully shelf-ready, processed and spined, with catalogue and item records for all collections at all sites, able to be successfully retrieved by users. All that is required from a multi-skilled Technical Services is order, receipt, invoicing and quality control, with a highly motivated staff looking forward to an exciting future — Utopia! 🌟

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things to do or to avoid. The list has a certain
gradation, encouraging knowing the community,
translating that knowledge into orders and
using the budget to meet those needs.
Money comes low down the list, indicating
its role as a means to an end. Likewise, deci-
sions must be made about gifts and the like,
but current needs must get treated first. (Also,
the gifts and brittle books processes are be-
ing massaged to eliminate decisions which
can be made for groups of items, like donated
books too fragile to be added to the collection,
before a subject specialist librarian needs
to look at a shelf of books.) Special projects
deserve their own reward, but they are not pre-
dictable enough to be placed high on the list.

Each of the other units includes its own
directives. That concerned with money
includes some reflections on the balance of
responsibility between the librarian as fund
manager and my own role as auditor of all
accounts and my responsibility for the first
stage in budgeting for the coming fiscal year.
(I meet with selectors individually to give
them my reading of the budgetary tea leaves.)
The session on monographs covers criteria
for selection of new titles, especially where
less experienced librarians are involved, and
expectations that gifts will be reviewed with
an eye to building a useful academic program.
Approval plans are particularly
important topics—and we have many. The less
experienced selectors spend several weeks re-
viewing their shelves together with me, so that
detailed instruction can be given at the most opportune
moment about the handling of new editions, the
documenting of rejected volumes and
the completion of sets once they are begun. (Inter-
pretation of approval profiles, especially where these
are automated, is an aspect of training which needs input
not just from the Coordinator, but from Acquisitions
and the vendor's representative.) Less experienced se-
clectors also may need input on the publishers regarded as
most trustworthy and the identification of textbooks, which are excluded from our
approval profile but which still may appear in a
shipment. (The business area is especially dif-
ficult to monitor for these, since casebooks [desired] and mere textbooks [not desired]
look very much alike.)

An additional factor which has entered the
training program of late is how we will handle
ongoing selection of materials for removal to
our offsite facility. This is one of the least
popular activities for librarians, since they
have to review lists of items for possible
exception (both time-consuming and discour-
aging) and may have to deal with irate fac-
tulty (some of whom dislike seeing any title
leave our overcrowded stacks).

The electronic products area remains a
vexing one. The market remains volatile,
driven by changes in technology and prolif-
eration of new products, as well as by changes
in copyright law and the costs of resources.
New selectors need to know the library's gen-
eral direction, which—in our case—includes
automation of reference services and the net-
working of resources to our off-campus cen-
ters. They also need to know the library's prefer-
ences in access (Web delivery with screening
by IP address rather than by password)
and funding (most continuations going
into a reference). Some day they will need to
be oriented to whatever policy we make on replac-
ing print with electronic or (not my favorite idea)
routing a networked version while still retaining
paper.

Serials training runs into questions not just

HANDBOOK 2

COLLECTION DEVELOPMENT CALENDAR
July 1 - Fiscal year (FY) begins
September 30 - End of first quarter
October 15 - Fall NEH proposals due (about 50-30% of BK funds should be spent)
November 1 - Budget preparation begins; fund managers inform Collection Development Coordinator of forthcoming changes in academic programs
December 31 - Review of FY expenditures

HANDBOOK 3

PERFORMANCE APPRAISAL CRITERIA FOR COLLECTION DEVELOPMENT

1. Effective liaison with faculty, students and other patrons in the assigned subject areas. These contacts enable
the RSL to do optimal selection of resources in all formats to meet the needs of these constituencies. Collections are
evaluated on the basis of their information. Departmental
profiles are updated as needed.
2. Responsible recommendation of electronic resources, both
reference/bibliographic and text/image, including electronic
data bases. Selections should meet the needs of the library's user community.
3. Effective selection of audiovisual materials and
microforms. This includes effective management of
durable plans to maximize cost-effective delivery of
appropriate titles and to minimize returns.
4. Responsible management of serial subscriptions in both print
and electronic formats, including the addition of new titles
and the cancellation of titles no longer needed.
5. Responsible management of the funds assigned to these
areas. Expenditures should remain as close as possible to the assigned amount, but no funds should be renewed without
consultation with the Coordinator.
6. Prompt handling of titles and replacement decisions
and gifts according to sound principles.
7. Special projects undertaken and new initiatives in collecting.

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