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Training the New Selector

by **Thomas Izbicki** (Johns Hopkins University) <izbicki@jhu.edu>

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 to 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 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.



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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!

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

(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 editorials 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

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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, decisions must be made about gifts and the like, but current needs must get treated first. (Also, the gifts and brittle books processes are being 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 predictable 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 reviewing 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. (Interpretation 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 selectors 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 difficult 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 discouraging) and may have to deal with irate faculty (some of whom dislike seeing any title leave our over-crowded stacks).

The electronic products area remains a vexing one. The market remains volatile, driven by changes in technology and proliferation of new products, as well as by changes in copyright law and the costs of resources. New selectors need to know the library's general direction, which—in our case—includes automation of reference services and the networking of resources to our off-campus centers. They also need to know the library's preferences 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 replacing print with electronic or (not my favorite idea) running a networked version while still retaining paper.

Serials training runs into questions not just

dundant some day; but we once thought the paperless society something other than a term of derision.

Overall, training cannot be divorced from policy any more than it can be devoid of a procedural content. The new selector needs to know how you do business, how they are expected to do their work and what outcomes are expected of them. They need guidance, but not more than that. Flexibility is of the utmost necessity, except where—as in the case of licensing and copyright—necessity dictates closer adherence to certain guidelines. Fiscal responsibility must be encouraged, but not to the extent of precluding initiative. (Having a reserve fund to meet new needs and to help out with unexpected demands is useful in encouraging initiative.) Be accessible; provide documentation, which can be consulted when you are not within reach. Reward initiative, and do not be too hard on errors made while trying to accomplish the assigned task. These are lessons I have learned while training and coaching new selectors for

work in an academic library. Please feel free to adapt anything you have heard today to your own situation. After all, no two libraries are run exactly alike; nor are our communities cloned from some one original. 🐼

HANDOUT 1

DEPARTMENTAL OVERVIEW
DEPARTMENT:
Resource Services Librarian:
Date:
Chair:
Liaison:
DEPARTMENTAL PROFILE
Academic Program:
Individual Interests:
Contacts with Graduate Students:
Departmental Library or Reading Room:
DEPARTMENTAL VIEW OF LIBRARY
Strengths of the Collection:
Weaknesses of the Collection:
Other Issues:
RESOURCE SERVICES LIBRARIAN'S ASSESSMENT OF THE COLLECTION
Evaluation Measures Taken:
Strengths of Collection:
Weaknesses of Collection:
Opportunities to Improve Collection:
Special Needs:
SERVICES
Bibliographic Instruction:
Computer Services:
PRINCIPAL LC CLASSES
RELEVANCE TO OTHER AREAS OF THE COLLECTION

HANDOUT 2

COLLECTION DEVELOPMENT CALENDAR

July 1 Fiscal year (FY) begins
September 30 End of first quarter
October 15 Fall NEH proposals due; about 30/35% of BK funds should be spent
November 1 Budget preparation begins; fund managers of forthcoming changes in academic programs begin review of PS expenditures
December 1 End of second quarter
December 31 Winter NEH proposals due
February 1 About 65/70% of BK money should be spent
February 15 Proposals for Friends of the Library due
March 1 End of third quarter
March 31 Fund managers submit to the Coordinator their Budget Request Forms with their projected budgetary needs for the next FY and their justifications
April 1 Spring NEH proposals due
May 1 Budget proposals are reviewed by Collection Development Committee, and any adjustments are made
May 1 Conclude most direct orders, except for patron requests & Reserves copies
June 1 Fiscal year ends
June 30

HANDOUT 3

PERFORMANCE APPRAISAL CRITERIA FOR COLLECTION DEVELOPMENT

1. Effective liaison work 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 this information. Departmental Profiles are updated as needed.
2. Responsible recommendation of electronic resources, both reference/bibliographic and text/image, including electronic serials, to meet the needs of the library's user community.
3. Effective selection of books, audio-visual materials and microformats. This includes effective management of approval plans to maximize cost-effective delivery of desirable titles and to minimize returns.
4. Responsible management of serials 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 those areas. Expenditures neither should be so rapid as to exhaust the assigned funds nor so slow as to concentrate too much spending at the end of the fiscal year.
6. Prompt handling of brittle volumes, replacement decisions and gifts according to sound principles.
7. Special projects undertaken and new initiatives in collecting.

of policy, like our default to non-circulating, but of finance. I need not dwell here on the headaches involved in maintaining even a lean subscription base in the face of inflation. As more publishers move to online access, and some indexing vendors fuse subject searches with fulltext access, this unit may prove itself re-