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Biz of Acq — Training the New Acquisitions Technician: From New Hire to Competence



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More often than not, individuals hired into acquisition technician positions have no previous acquisitions work experience or education, and may even have no prior library work experience. Moving someone from knowing nothing or a little more than nothing to competence with work that may be quite complex is a monumental task, and this may be done mostly by trial and error by those who have to hire and have little experience with this. Over the years, I've moved a number of acquisitions new hires to competence, and this article is an overview of my process, refined over time, and will hopefully prove helpful to those with little experience with this.

Education and Training

Both education and training are necessary to create competence in library acquisitions. While it's entirely possible and sometimes beneficial to have technicians entirely perform rote tasks without understanding what they're doing, more complex tasks require more knowledge and skills and more training. Competence in any task requires understanding why a task is being done a particular way. Tasks which occasionally or frequently require the application of judgment may require knowledge of theory, interconnections with other library units, and the policies of any over-arching agencies. Training produces competence in a task, whereas education provides theory and the ability to make judgment calls, and enables technicians to independently make decisions, solve problems, and develop or modify procedures.

ALCTS Fundamentals of Acquisitions Syllabus

Section 1. Goals and Professional Resources

- Exercise 1: What is Acquisitions and Basic Terms Quiz
- Exercise 2: Prioritizing Acquisition Goals
- Exercise 3: Standards Collaborative Student Wiki
- Exercise 4: ILS Quiz
- Section 1 Self Test

Section 2. Basic Methods, Functions, and Workflows

- Exercise 1: Definitions Review Quiz
- Exercise 2: Order Request Forms
- Exercise 3: Workflow
- Section 2 Cumulative Self Test

Section 3. Vendors

- Exercise 1: Types of Vendors and Services Quiz
- Exercise 2: Vendor Assignment Quiz
- Exercise 3: Vendor Performance Evaluation and Financial Viability Quiz
- Exercise 4: Ethics Case Studies
- Section 3 Cumulative Self Test

Section 4. Budget, Finance and Accounting

- Exercise 1: Budget Quiz
- Exercise 2: External Financial Officers and GAAP Quiz
- Section 4 Cumulative Self Test
- Final Project Group Assignment – Begin Work on Your Project

Section 5. Special Formats

- Exercise 1: Special Formats Quiz
- Exercise 2: Electronic Resources Quiz
- Exercise 3: Music Quiz
- Exercise 4: Video Quiz
- Exercise 5: Identifying Special Formats Vendors
- Section 5 Cumulative Self Test

Section 6. Conclusion, Comprehensive Assignment, and Final Exam

- Final Project: Create an Acquisitions Manual
- Final Exam

When I train, I try to provide some education, but I don't hope to provide anything on par with an actual course, such as the ALCTS Fundamentals of Acquisitions online course, which all of my staff take. I'll include a few suggestions regarding education in this article, but highly recommend registering new acquisitions staff for the course itself during their first few months on the job. All of my new hires have taken it, since long before I became an instructor for it, oftentimes obtaining not only education, but also information and ideas that proved valuable and that we put to use.

The Training Outline and Timeline — An Overview of the Training Process

In advance of training, I always create a training outline with a timeline. The outline includes basic areas that will be covered, as well as a time range for learning it. When new staff begin work, I give them the outline so that they understand what they'll be learning and how long I expect training to take. The timelines I give are always ranges, allowing those with substantive experience to move on very quickly, while allowing those with less experience to spend more time to master skills before moving on.

Training Outline and Timeline Example

Part 1: The Basics, 4-8 weeks: General office and employment info, acquisitions at UMBC, searching, bibliographic matching skills, series searching, exporting OCLC catalog record, order creation, and workflow review.

Part 2: Intro to Rushes, 1-2 weeks: The web order system, basic rush ordering, and reserve orders.

Part 3: Special Procedures and Problem Solving, 2-6 weeks: Added volume and added copy orders, replacement orders, not-yet-published orders, resolving differences between orders and records found, resolving differences between records found in different databases, reprint orders.

Part 4: Intro to Student Supervision, 2-4 weeks: Schedule, professional treatment, work assignment, training, checking work and follow-up, supervision, evaluations.

Part 5: Special Formats Ordering, 1-2 months: Procurement methods, vendor selection, videos, sound recordings, scores, e-books, foreign books, out-of-print books, computer files, slides, plays, government documents, conference proceedings.

Part 6: Managing it All, 1-2 weeks: Prioritizing work, using a calendar to organize and prioritize tasks, systems of organization.

Part 7: Preparing Procedures and Documentation, 1-4 weeks: Basic HTML, minor editing, major editing, reviewing existing documentation for currency, creating entirely new procedures.

Part 8: Necessary Extras, 1-2 weeks: Backing up other staff, compiling statistics, answering faculty and liaison questions.

Day One — Orientation and Learning Expectations

Through long experience, I've found it extremely important to focus trainees on learning, as some trainees will approach their training work as a production task, while failing to learn to mastery, and not get what we were expecting them to get from the training, only to later fall unacceptably short on quality. Quite explicitly, in my very first meeting with a new hire, on the very first day, I will tell them that their top task is learning, and they should be proactive about it, and take time to read, take notes, study procedures, reformat information in ways that makes more sense to them, or whatever it takes for them to master the information being presented, and that taking two hours to wrap their head around information is far better than getting it done in an hour but not having a good handle on the information presented and the work being done.

Through long experience, I've also learned to tell trainees that I have an "open door" and that they should come to me and ask me questions about the work that they're doing, and that I really frown on guessing when someone could just ask a question. I'll also let them know that we'll have daily training sessions for their first few weeks, and also have additional "how's it going meetings" on Fridays, outside of the department, oftentimes in easy chairs in the stacks, for them to tell me about any problems they're having,

continued on page 71

or concerns, so that I can adjust the next week's training based on their feedback. Requiring them to walk away from the unit, and talk to me about how they're doing, without any work at hand to talk about, tends to get a lot of information that trainees might not otherwise convey on a new job where they're trying to impress, and it's important to make sure that this two way communication is happening, and it's not just us trying to cram more and more information to someone who may very well be overwhelmed and confused, but just not saying so.

The Detailed Training Plan

Giving some thought on a rational way to do each portion of the training can go a long way in ensuring that you cover everything in logical manner, and can really enable the trainee to succeed. For this, it's important to break tasks down into all of the information that a trainee needs to know in order to be able to do that tasks, and do it correctly. When you know how much is involved in any given task, you can determine if it should be presented all at once, or divided into portions, focusing on one new skill or decision at a time. This allows people to absorb and become fluent with manageable bits of information, rather than overwhelming them with a huge amount of information all at once.

I like to begin training with work that focuses on the mechanics of the task, without too many decision points or variations, to allow mastery of the basic task before adding complexity. For example, I approach order creation training with a set of orders that are all very similar, which allows the trainee to gain familiarity with the system and order records before they have to make a lot of decisions, so we generally begin with orders going to our primary vendor for our stacks collection without any notes, so only the price varies. Then, we add orders with additional decision points, like items going to other collections such as reference and special collections, which require that a different collection code be set, and then items with library and vendor notes. Trainees will have a lot of experience with just those variations of orders that go to our primary vendor before they begin rush ordering and begin creating orders going to two more vendors with other special settings. They'll only deal with the full range of decision points when they learn special ordering which includes a full range of vendors, variations in settings for different material types and different procurement methods.

My detailed training plans can approach 20 pages with all of the tasks broken down. Usually, as I begin breaking tasks down, I end up doing a lot of re-arranging of the order of training, as the order I initially come up with doesn't make as much sense when I begin looking at it in terms of the bits of information needed to do each tasks.

On Your Own Activities

My more detailed plan includes "On Your Own" Activities that the trainee is expected to complete, which include learning elements that are more educational than task-completion orientated training. These may include reading procedures, reading various texts on acquisitions, doing various tasks such as familiarizing themselves with their computer, as well as meeting with various staff members who do related work to find out how their work connects to the trainee's work. "On Your Own" Activities provide both some theory and some self-directed learning to fill time when a trainer or appropriate work isn't available to the trainee.

The Training Session

Each training session begins with preparation. It's important to insure that you have everything you need for a training session *before* you sit down with the trainee.

The first step is to ensure that there is an ample supply of work available to provide sufficient practice of the procedure that you'll be teaching. If you only have one or two orders for music scores on hand, you shouldn't train someone to search and order scores, regardless of what your training plan says that you should do next. If you don't have ample work for sufficient practice of the next thing your training plan says to train them to do, be flexible — the trainee can either do work they've already learned, or you can train them to do something else, or alternately, if you've given them learning activities to do on their own, they can work on those activities. The training plan is a guideline

"On Your Own Activities" for a Trainee Learning Special Ordering.

On Your Own:

Required:

1. In *Buying Books: A How to Manual for Librarians*, read and study chapter 7, "Vendors, Retailers and publishers," p. 67-75. Understand and know answers to these questions:
 - a. What are the three choices in selecting vendors to supply books?
 - b. What are the advantages and disadvantages of each?
 - c. What order statuses are routinely given by publishers and what do they mean?
2. In *catalogusmai*, learn how to do a command language search. Go to command language search, and click on tips to learn how. Try the following searches:
 - a. Search for the OCLC number ocm11801289
 - b. Find books and scores with the title "The Flying Dutchman"
 - c. Find what we own that was published by the company "Printed Matter"
 - d. Find the books that we own that include Arthur Miller's play "Death of a Salesman" (use content notes)
 - e. Find Russian movies based on the author Tolstoy's novel that have English subtitles (use two language limitors).

Suggested:

1. Make an appointment with Joe Clark to learn about Library Media and its impact on Acquisitions and Acquisitions impact on them.
2. In *Amazon Hacks: 100 Industrial Strength Tips and Tools* (Paul Bausch. O'Reilly & Associates, 2003, read chapter 1, "Browsing and Searching," pp. 1-30.
3. Read the Barnes & Noble searching help screen to learn more about its capabilities.
4. Read the OCLC Searching User Guide at <http://www.oclc.org/support/documentation/worldcat/searching/userguide/default.htm> and the OCLC Searching Reference Card at <http://www.oclc.org/support/documentation/worldcat/searching/refcard/> to learn more ways of searching OCLC.

and when following it exactly doesn't make sense, it's always best to modify it accordingly.

The next step in preparation for the training session is to review documentation of the procedure that you'll be teaching and to ensure that it's up-to-date. Accurate, detailed, and current documentation provides an explanation of how to do the work that the trainee can go back to and review. Inaccuracies or out-of-date information can render the documentation unusable, so it's important to make corrections in advance of the training session.

Next, if you don't already have an outline of how to train someone to do the procedure, you should create one. You should know what you'll say and show first, and important concepts that are critical to the work. For example, if you're training someone to order videos, you may determine to teach them to order popular videos likely to be available from Amazon first, and to later work on documentaries. You might identify format, region, encoding, and screen dimensions as important concepts to talk about.

When you finally sit down with the trainee, first you want to ensure that they know how to find the procedure wherever it resides. I generally have them find it, and then print a copy to keep next to them during training and to read and follow their first few times through the task. While it may seem self-evident, it's important to explain why we're doing a task, why it's important, and what would happen if we didn't do it, and what happens if we make a mistake. For example, if you're teaching someone to search the catalog, you need to explain that the purpose of searching the catalog is to identify if we already own an item, or if it's already on order, and that in order to use the funds we have as effectively as possible, we generally want to have only one copy of a particular item, and we only want to purchase more than one copy when there is a good reason to do so and the Collection Management Librarian has approved the purchase of multiple copies of the same item.

Rather than telling the trainee how to do the tasks, or walking them through the task, we always first *demonstrate* the task. It's important

continued on page 72

to remember learning styles differ, and when we offer the trainee an opportunity to see the procedure, while following along with the documentation, and hearing us explain how to do it, they get a good bit of information before they ever have to do it themselves, and they get that information in a variety of formats as well. I like to start by showing the trainee the task at full, normal speed. Then I like to demonstrate the task a second time using the documentation as if I didn't know how to do the task, reading each step aloud as I do it. Finally, I ask the trainee to do the task, reading each step aloud from the documentation before doing it—on the first attempt, the trainee may need further instruction on using the systems or interface as well as correction if they're doing something incorrectly.

Once we've demonstrated, and the trainee has completed the task once, the trainer should continue to teach, until the trainee has demonstrated mastery. First, observe the trainee doing the work, continue to give prompts and correct as necessary, until they've done it correctly and independently a few times. Then, give the trainee a small set of items to do on their own, and have them bring them to you immediately when they've finished. Immediately check that work, and give them feedback, which can either be in the form of corrections, or a "good job." Thereafter, I generally give increasingly larger sets of work, checking each as soon as possible thereafter, until I'm convinced that the trainee knows how to do it. When I know the trainee knows how to do that work, I stop checking it, and consider the training session completed.

Depending on the amount of work on hand, I may have the trainee continue doing the new type of work that they just learned exclusively for a few days, but I consider them to know a particular procedure once we no longer have to check their work. All the same, while someone knows the procedure and is able to do it, they may still need support, as non-typical items appear and as they have questions, and will need to be coached for an extended period of time before they've truly mastered it.

The Time Commitment

As a general rule, if already well prepared with a training plan and mostly current documentation, I expect that training a new full time acquisitions technician will require approximately 20 hours a week during their first month on the job, including time spent preparing for training sessions, checking work, and providing feedback on work. That first month tends to be particularly critical and time intensive, because in addition to learning the physical office and systems, and getting generally orientated, trainees are usually working on fundamentals such as searching that will serve as a foundation for all of the other things that they'll learn to do in the future. So, that time spent explaining things and checking work is particularly important, and an investment in the future when basic skills are absolutely mastered. While training someone with experience or a particular aptitude for the work may take less time, it's generally best to set aside more time for training than to set aside less time and not have enough. Without adequate training, no trainee can succeed, and any related experience may only be marginally applicable given the wide variation in policies, procedures, and systems across libraries.

After the first month on the job, the trainee is usually able to do some limited types of work independently, and can spend a good bit of their time on production tasks, which serves as a review of what has already been learned. This is critical if the trainee is going to retain what they've learned, so the pace of training and the time needed for it decreases. Usually I expect to spend ten hours a week on training during an acquisitions technician's second and third months on the job, with the amount of time spent on training gradually decreasing thereafter until they're fully trained.

Since most of us don't have 10-20 hours a week free for several months to do training, it's important to look honestly at tasks and commitment, as well as the resources you have, and make choices in order to free up the time needed. When under time pressure, it's important to remember that a well trained staff member will alleviate that pressure, whereas a poorly trained one will endlessly require your time either to correct and fix problems, or to do work yourself that you can't give them because they are unable to do correctly.

Team Training

There are two basic reasons for including more than one person in training the same trainee. The first is expertise — when another librarian or staff member is more qualified to do a particular type of training, you may want to have them do the training instead of you, or you may have them do that particular type of training with you. The other is time — you may want to have others train in your place when you're either not available, or when you're workload doesn't allow you time to train.

All of my staff receive some level of team training, because we always include cataloger and acquisition staff at my library search OCLC and export bibliographic records from it into our catalog, and also create short bibliographic records that appear in our public catalog when an OCLC record is not available. I have neither the delusion nor the desire to think that I have or can maintain competence in this on par with our professional catalogers. Also when I'm the supervisor and trainer, I always have a technician serve as a back-up trainer due to a demanding meeting schedule that makes me unavailable for periods of time.

It's important to note that delegating the training of a new person entirely to someone else doesn't constitute team training—if you're making someone else entirely responsible for the training, they should be both the trainer and the supervisor, and should have appropriate skills and an appropriate classification level for this. If you're so busy that you're going to be largely absent and unavailable to train, or too busy to train, so that someone else will have to do most of the training, you should quite deliberately make someone else the supervisor and allow them to do all of the training. If you're a trainee's supervisor, but someone else is doing the majority of the training, and there is a problem, this arrangement may be very problematic. You may be bound by confidentiality to *not* tell the person doing the training in your place that there is a problem and how you've addressed it, even if the person doing the training is the one who observed the problem and reported it to you! Also, if problems reach an actionable point, human resources departments may need information on the training that a trainee received to ensure that problems weren't caused by inadequate training, and they'll expect the supervisor to provide this information. By not dividing the majority of training from the supervision, it ensures that conversations can be had not only with Human Resources with all of the information on hand, but also up and down the chain of command. It also ensures that problems can be adequately addressed when they occur by the person who observed them, and more often than not, that person is the trainer.

When doing team training, *you* remain entirely responsible for all of the training, regardless of who is participating in or providing the training in your place. You can pass the responsibility to someone else by making them the supervisor and trainer, and hold them accountable for doing it, but if you are the supervisor, you are the one accountable. This means that you should ensure that those who participate in training, or do it in your place, know how to train, and that they are competent to train on whatever skill that they are teaching, and that the trainee actually learned what they are supposed to learn. Unless you are absolutely sure of the skills of the person who is going to train, you should check, and you should also check at least some portion of the trainee's work to ensure that mastery was reached, and if necessary, go back and revise the training if there are problems.

From Training to Coaching

Once trained, new people usually know how to handle the majority of their work in accordance with basic procedures, but there is usually a steady stream of exceptions and oddities that they don't know how to handle, and they also may not know how to organize their work, or prioritize their work. At this point, the trainer becomes a coach, who directs the person on how to resolve problems, and who may manage their workload by holding some types of work until they have time, or by prioritizing the work the person already has.

As a coach, it is important to be both a helper and cheerleader, and to recognize that you are an important resource that this person needs in order to do their job. You need to continue to make time for them on an ongoing basis, and while you work with them less closely than before, you still meet with them and talk to them on a very regular basis or they quite simply can't do their work. In some instances, either due to the level of supervision you want to maintain, or due to the limitations of the person, you may want to remain a coach indefinitely.

continued on page 73

As a part of coaching, you may want to explain how you're resolving problems and making decisions, or maybe not. If it seems like the person is still have trouble with their basic work, or seems overwhelmed, you probably don't want to. If they're consistently doing it very well, and have a handle on it, you probably should give them more information about how you're solving problems, and as they grasp this information, allow them more independence in resolving ones that you've explained to them.

From Coaching to Independence

As I said above, there are often good reasons to maintain a coaching relationship with a staff member indefinitely. In other instances, it may be advantageous to move them to full independence in doing their job. Those who are highly skilled and competent may be unhappy to have a coaching relationship indefinitely, while others may always be more

comfortable with a closer working relationship with their supervisor regardless of their competence level. You may want to always be involved more closely with some aspects of their work because of its nature, or you may want or need to spend less time coaching them in order to be able to do other things. But there is a decision to be made here, and one that is best made with the full agreement of the staff member involved, as you can't make someone who really wants more direction be independent, nor can you make someone who wants to be more independent consult with you, so I highly recommend a direct discussion about this, and that you either agree or compromise about it, but reach an agreement that you both can live with.

Conclusion

When training is done well, it requires a lot of time spent planning, working with people, and checking work. While the time commitment may seem monumental, a skilled and competent technician will save a great deal of time in the future, so whatever process you use for training, it's time well spent. 🐾



Pelikan's Antidisambiguation — Identity Literacy: Time to Teach it?

Column Editor: **Michael P. Pelikan** (Penn State) <mppl10@psu.edu>

Check out the history of libraries in Wikipedia and you'll find, "The first libraries consisted of archives of the earliest form of writing...These archives...mark the end of prehistory and the start of history."

Examine the concept of Literacy and its history and you'll find that, "...early acts of literacy were closely tied to power and chiefly used for management practices, and probably less than 1% of the population was literate, as it was confined to a very small ruling elite."

In libraries, we pride ourselves in promoting literacy as a Public Good. We point with an objectively supportable justification at the history of the public library movement in the United States. I'd like to suggest, however, that we have still far more to do in the promotion of literacy.

We've expanded our definitions of literacy to embrace the ideas captured by mathematician **John Allen Paulos** in his book, "*Innumeracy: Mathematical Illiteracy and its Consequences*." From public libraries to university libraries, we find evidence that careful collection developers have taken care to include materials that intercept and assist people with literacy and numeracy at all ages and at all levels of accomplishment.

Today I'd like to propose the idea of Identity Literacy. Just as we teach and promote literacy and numeracy, perhaps the time has come that we should name and promote Identity Literacy among our students and clientele.

Social Media services are not merely the first place many people go when they fire up their computers. Facebook and Twitter are not simply where many people do most of their voluntary reading and writing. No — these services are in fact the source of choice to which many people turn to obtain, and even to establish, an online identity.

Identity Providers represent an immensely powerful industry. For many young people, the attaining of an ID from one of the important identity providers such as Google, Twitter, or Facebook marks a point of passage in the establishment of personal autonomy, approaching or on the level of getting one's driver's license. A university network ID is simply something one receives at New Student Orientation.

A university colleague of mine recently observed that, likely, persons we serve in the junior high school to undergraduate age demographic group are most likely to regard the identity we provide them with as a temporary tool, not adopted by preference, but used because it is required — to access the systems and services we offer. On the other hand, they regard their "social identities" as being owned by them, and as being a more-or-less permanent representation of themselves and their interests.

But when do the gigantic industrial providers of identity ever try to raise the Identity Literacy level of their customers? Those customers are the product they're in business to produce. They'd rather offer an Easy Button, with hidden hooks and barbs, so as to enrich their collection of marketable metadata. They're protected by the fig leaf of compliance: they publish their terms of service.

According to a U.S. Department study in 2003, cited in the Wikipedia article "Literacy in the United States," 21% to 23% of adult Americans were not "able to locate information in text," could not "make low-level inferences using printed materials," and were unable to "integrate easily identifiable pieces of information." It has become a truism that most persons don't read the Terms of Service displayed on click-through screens as they sign up for online services.

So in light of the Department of Education's notions of literacy as an ability to locate information in text, to make low level inferences using printed materials, or to integrate easily identifiable pieces of information, how will the "average" junior high, high school, or college undergraduate do if handed a printed copy of the Terms of Service of a modern Social Media Identity Provider? Will they be able to extract a cogent representation of the content of those terms of service? Could they read it and translate it back to you in the vernacular? Would they feel it's worth the effort to try?

Interestingly, it's a person's name (and its expression) that we often treat as a foundational building block of literacy. Historically, the fact that one could write and recognize one's own name was a rudimentary test of learning. The writing of a person's name, rather than making "one's mark" has been used by some scholars in attempts to estimate early literacy rates. Today we learn to write our names at a very early age. We applaud and celebrate the attention and seriousness with which a child turns to the effort to spell out his or her name. We preserve those first autographs alongside early interactions with clay or paint. Perhaps we value them so highly because they are among the first lasting evidences of a person's intentional engagement and interaction with the world.

In the early days of multi-user computing systems, one adopted or was assigned a user name, typically used simply within the scope of a single system. I can't even recall with certainty what my first computing identity was or how it was assigned, back when my goal was to learn something about these mysterious, often untouchable systems. My college had a PDP-11. Of course, I was also willing to try my hand at Wumpus, or Adventure, or Trek.

continued on page 74