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Caryl Ward

Binghamton University Libraries, SUNY, cward@binghamton.edu

Stacey Marien

American University Library, smarien@american.edu

Alayne Mundt

American University Library, mundt@american.edu

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Let's Get Technical — How Not to Panic When the Key Employee Needs Extended Time Off

by **Caryl Ward** (Head of Acquisitions, Subject Librarian for Comparative Literature, LACAS, and Romance Languages, Binghamton University Libraries, SUNY) <cward@binghamton.edu>

Column Editors: **Stacey Marien** (Acquisitions Librarian, American University Library) <smarien@american.edu>

and **Alayne Mundt** (Resource Description Librarian, American University Library) <mundt@american.edu>

Column Editor's Note: *In this month's column, we feature the experience of coping with a staff member's planned and unplanned absence. Caryl Ward, Head of Acquisitions from Binghamton University Library (SUNY) describes how the Acquisitions Department handled the workload for an unexpected lengthy staff absence. — SM & AM*

The Situation

Binghamton University, part of the 64 campus SUNY system, is a mid-sized institution offering bachelor's, master's and PhD programs. The **Bartle, Science and University Downtown Center Libraries** are centrally managed, with collections that consist of over 4 million print and electronic books and over 125,000 electronic journals. With 25 library faculty members, 36 professional and 22 classified staff members, the Libraries serve a growing campus of more than 13,000 undergraduate and 3,600 graduate students. Acquisitions is part of Technical Services and has dwindled in the past few years from 13 members to just five: The Unit Head (librarian); one professional; one Clerk III and two Clerk IIs. Each person's work is critical to the unit and to the provision of monographs to the campus. All employees are unionized and the classified service positions are within the purview of New York State Civil Service. Acquisitions members order, pay and copy catalog monographic print and electronic selections made by bibliographers and administer English and foreign language print approval plans. During the previous fiscal year, about 11,300 individual print and 1,360 eBooks were processed. eBooks are generally cataloged within 2 business days and print within one week; invoices are processed in the integrated library system (ALEPH) and forwarded to the campus business office within 30 days. There is no cataloging backlog.



The Problem

The Clerk III functions as office manager, coordinating the day to day ordering, receiving cataloging and payment functions, with a focus on firm orders. She is respected and appreciated by subject librarians because she can locate material at its best price and routes it appropriately. She deals with the routine and the impossible every day, never drops the ball, and serves as a model for the other clerks.

During the second half of the 2015-2016 academic year she had to take two extended leaves of absence. The first was anticipated and scheduled several weeks beforehand but her return date was uncertain. It turned out to be about 3 weeks. One month later a second leave was necessary, beginning abruptly, with no advance notice or return date. It stretched out for four months, during the busy end of fiscal year buying cycle.

We had to identify her essential duties and determine which we could reassign. But what could we let go? What lessons would be learned?

Leave #1 — How We Planned For It

The Acquisitions and Technical Services staff were cognizant of the importance of the Clerk III's work and very willing to pitch in during her absence. But there were knowledge gaps and a long learning curve for some of the duties. One concern was working out of grade — being in a union environment most of the Clerk III's duties are uniquely performed by her and there was no designated backup. With several weeks' head start, it was possible to pinpoint necessary tasks and designate staff to cover them.

Being incredibly organized, the Clerk III prepared for her own leave. After a debriefing with the librarian, including sign on information for her email and computer and credit card details, the entire unit gathered around her workstation to review the major duties and divvied up her major responsibilities. A few members of other Technical Services units stepped in to assist. The Clerk III shared some clear instructions:

- Problem order printouts were filed in logical order and annotated. *This vendor has been contacted three times! / This book was received damaged — waiting for replacement! / This vendor charged us tax — waiting for reimbursement! etc.*
- Forms for incoming material needing special processing were completed and left with notes. *Notify Prof X / Show to Special Collections upon receipt*
- Passwords were shared, and the staff watched while she signed into various systems (Amazon, GOBI, local shared files, the unit's email account, etc.)

When the Clerk III finally went out, there were some bumps in the road but we hoped the trip would be short. We needed to schedule frequent meetings in addition to the impromptu logistical exchanges to brainstorm on the fly. For example, one of the clerks noticed that the flow of printed invoices had diminished. They were being delivered to the Clerk III via email and were languishing in her inbox. This clerk suggested filing them in a new folder after printing, so everyone reviewing the email account would instantly recognize that a new invoice needed attention. Bingo! Problem solved.

A few activities — like gathering certain statistics — were suspended in the hopes that the leave would be brief and she'd catch up upon return. Amazon orders went on the back burner because of the complexities involved, including the use of a state credit card. This included out of print and replacement material orders, which are generally of a lower priority than current publications. The staff began to learn how much each person contributed to the workflow and the significance of each procedure. The two Clerk IIs took the job to heart and it was only three weeks! Whew!

Leave #2 — Oh No! Here We Go Again

One month later, the Clerk III's second leave began unexpectedly in the middle of a work day. We had no idea it would last four months, extending through fiscal year close, and the rollover to new year. It all began to seem overwhelming — we couldn't ignore the non-routine firm orders for too long, but the challenges were forbidding. The two Clerk IIs still had to cover their own jobs and now we faced an empty chair for an uncertain period. How much time would it take to learn all her tasks? The order and billing processes via state credit cards are cumbersome but necessary for Amazon which is the best vendor choice for many films, replacement books, and rush requests. The numerous steps involved in firm orders for course reserves and notifies are straightforward but these are best handled by one person from start to finish. Those attributed to grants and other "non-state" funds require special handling and processing — again, best if one person has responsibility. Procurement from Asian vendors can be tricky: advertised material is not always available, delivery can take months and the language barriers make problem solving frustrating and time consuming. The Clerk III had

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developed effective routines and relationships over time. The end of the year was fast approaching.

It's been said that when the going gets tough, the tough get going. During this second leave, the clerks cooperated to support their absent colleague. Together with the professional employee, they began to assume responsibility for the Clerk III's job and ensure that the unit ran smoothly.

- They suggested more formal meetings, which became very productive as specific problems were addressed and clerks proposed solutions.
- They kept the Acquisitions librarian informed via email of routine and unusual situations that they might have conveyed to the Clerk III.
- Staff who might not have otherwise proposed change were enthusiastic and proactive about covering for a co-worker.
- They spoke up when they noticed something falling off the radar screen. For example: Printed invoices sitting in a bin for several days.
- They suggested modifying routines. For example: The Clerk III maintained a log of invoices received by each staff member. They began updating it themselves.
- Staff from other units added to the effort by processing invoices and copy cataloging.

Lessons Learned

The world didn't come to an end when we stopped compiling some statistics.

Working "out of grade" problems did not occur. Clerks stepped up in the knowledge the situation was temporary, and we were fortunate to have professional employees from other units assisting.

Cross training is essential. (DUH!) If it is unrealistic to have all staff fully cross trained, it is imperative at least that other people know what each person does so that no tasks are left out of the workflow.

Assistance from other units is helpful but not fully effective if the members are not dedicated full time.

Vendors were understanding of the situation and cooperated with the staff who filled in.

The Results

All important work got done, and subject librarians were respectful of this. The most important tasks of procuring and paying for current imprints of print and electronic books were successfully completed during the Clerk III's absence.

She did not come back to a disaster, although she did have to catch up on out of print and replacement ordering. Upon reflecting on her absence, the Clerk III had these words of advice: Keep it organized! Post notes on order records or on paper copies of orders, make copious printouts, and be cognizant that you never know when you might be out.

She returned to a stronger team that had better communication, including more frequent and productive meetings. Some of the temporary changes, like moving printed invoices into a folder, and individuals updating the invoice log, were retained by the Clerk III. The Clerk IIs are activating their own statistics in a shared filed worksheet each month.

The lasting impact is that everyone now has a better understanding and appreciation of everyone's responsibilities. With a shared sense of purpose, the unit is functioning more efficiently than before. 🐾