

# Training the Next Generation: Best Practices in Student Training at the University of California, Riverside Libraries

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## **Abstract**

From 2010 to 2014, the University of California, Riverside Libraries Special Collections & Archives Department developed and implemented a student employees training program with a focus on education and expectations. This paper discusses the best practices used to develop student employees' "soft skills" in addition to training them to be integral members of the daily operations of the department.

*Keywords:* Academic Libraries, Archives, Special Collections, Student Hiring, Student Employees, Training Program

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Academic libraries routinely entrust student employees with daily library services and tasks, ensuring the consistency of library operations. With the decrease in recent years of support staff positions and widespread budgetary reductions, student assistants are hired and trained to develop specialized skill sets in order to fulfill the responsibilities that had previously been assigned to full time paraprofessional and professional staff. In addition, academic libraries within the structure of higher education have a responsibility to assist in the educational process of undergraduate students.

Given the uniqueness of special collections' materials and the range of services performed, such departments function as a "mini-library," with student employees serving on the front lines and behind-the-scenes. Some departments have processing units for newly cataloged material, minimal level archival processing and basic preservation needs. Additionally, special collections departments provide regular public service functions. In many cases, desks are staffed by student employees who field and answer informational and basic reference questions. This is one of many aspects of a special collections department that creates an environment somewhat separate from the library as a whole.

Because special collections departments rely so heavily on student employees, supervising and managing them can pose many challenges. Much of the professional literature suggests creating a "game plan."

Dunlap (2007) suggests developing goals and objectives for a student training program, stating “[G]oals serve as a guide by providing direction for the training and development process and should be closely aligned to support the organization’s mission” (p. 9). In the Special Collections & Archives Department at the University of California, Riverside (UCR), paraprofessional and professional staff discussed goals regarding what the department expected from the student employees, in addition to what the student employees might gain from employment within the library.

At the time UCR Special Collections & Archives Department provided access to more than 400,000 books, including the Vernon Duke Collection on Paris, an extensive History of the Book Collection, and the Eaton Collection of Science Fiction & Fantasy, then world’s largest publicly-accessible collection of science fiction, fantasy, horror and utopian literature. It also comprised more than 6000 linear feet of archival collections including the Citrus Experiment Station, Tomas Rivera Archive, the Tuskegee Airmen Archive, the Sabino Osuna Photographic Archive of the Mexican Revolution, and the Paraguayan political archives.

In 2011, financial constraints at the University resulted in the downsizing of the department. Two professional positions and one paraprofessional position were lost to retirement and transfer, leaving the department to operate with two professionals, one 1.0 FTE paraprofessional, and one .50 FTE paraprofessional. Additionally, due to reduction in Work Study funds, the student employee pool had been smaller than it had been before 2010. During these four years the department employed only seven to nine federal work study students.

As the leading research collection of science fiction and fantasy, the Eaton Collection served as the major educational resource for the English, Comparative Literature, and Media departments at UCR. Both undergraduate and graduate students conducted research in the department, as did international scholars, Science Fiction fans, and general “SCI-FI” enthusiasts. Many undergraduate English course would assign students to read comic books from the Eaton Collections. During those courses, seats in the Reading Room were in short supply, so students were required to sign a waiting list or schedule in advance for access to the course materials. On a monthly average anywhere from 81 to 140 patrons visited the Reading Room and student employees completed, on average, 250 to 400 reproductions a month.

Before 2010, student employees were divided among different units within the department. There were Public Service/Stacks Maintenance students, Preservation students, and Archival students, supervised and reviewed by a member of the staff within that section of the unit. This created mini silos within the department where student employees had

different expectations and standards for their work. Students who did not serve on the information desk had more leeway with their schedules. In addition, expectations towards the quality of work were not uniform among supervisors.

As the department underwent staffing changes through retirements, transfers and layoffs, there was a need to reorganize student employee time and duties. Discussion about goals and needs continued among the department staff, leading to the resolution to develop a better interviewing process and training program, and to establish defined expectations and standards for student employees. Preparing undergraduate students for the workforce after college was also a key element of training and supervision.

Following the suggestions, techniques and strategies given in the professional literature, this paper discusses the design and best practices used in successfully implementing the hiring and training program at the University of California, Riverside Special Collections & Archives beginning in 2010.

## **Advantages of Mentoring Student Employees**

Mentoring, whether formally or informally, is an important element of student supervision. As librarians, we set examples and expectations that could be advantageous to a student employee and the profession as a whole. Much of the literature acknowledges the need for student employees in academic libraries to conduct daily activities. Reale (2013) states that it is within the best interest of libraries to train their students well, not only in the art of service, but as young adults who will soon enter and face the actual work world themselves. As library professionals we partner with the educational process and the time and effort invested in mentoring reaps benefits for both student employees and librarians (p.1).

In a survey conducted by Maxey-Harries, Cross, and McFarland (2010) on the educational experience of professional library staff, fifty percent of the respondents had “previous experience as a student worker at a college or university library” (p.152). As Reale suggests, “[I]f we, as academic librarians and other paraprofessionals, are working side by side with students day in and day out, we have to seize the opportunity to help them along in their job and what would be so terrible if a few who were helped along the way actually became interested in the changing field of library science” (p. 3). Mentoring and providing a work environment similar to the actual working world could instill motivation and personal fulfillment in the student, while also bringing new life to a “graying” profession.

It would be reasonable to suggest that many undergraduate students have one goal in mind-- to graduate from college. However, mentoring

can give the student direction and a sense of achievement, while simultaneously maintaining an efficient workflow in the department. Sweetman (2007) suggests that having an interest in the job is a better form of motivation than incentives and rewards (p. 123). Giving student employees ownership over their recommendations and ideas can stimulate enthusiasm for the job. To create such an environment Sweetman recommends librarians engage student employees at all levels of expertise in conversation pertaining to their job responsibilities (p. 124). While there is a substantial investment of time in involving students in discussions, there are benefits to the students, the library, and ultimately the profession. These benefits more than justify time invested.

After 2010, student employees at UCR became a more integral part of the department, recognized for their contributions to providing enhanced access to materials and better service for researchers. The direct supervisor schedule monthly meetings to communicate past and upcoming activities and projects within the department and library. Student employees participated in the department's social media campaign, in addition to providing feedback about current policies and procedures. Since these student employees interacted with the public and were the key operators of the day-to-day department functions, their input was very important.

## **Specialized Needs of a Special Collections Department**

Many students entering a special collections department lack the experience and understanding of such a department. According to Wiener (2010), “[I]n the case of undergraduate students, it is very unlikely that entering students will also come with any sort of knowledge of what an archival institution is, what it does, or what types of work takes place within its confines. This presents a particularly unique challenge when one is trying to train a student about a task which is unfamiliar in purpose, significance, or meaning” (p. 59). While a special collections department is typically placed within an academic library, there are often vast differences in holdings, daily services, tasks, and needs in such a department. To maximize the training process and the skills of an incoming student employee, it is important for the student to have a comprehensive understanding of the specialized nature and purpose of a special collections department.

The uniqueness of rare, specialized, and archival material requires adjustments in traditional library duties, such as public service and stacks maintenance tasks. Given that material within a special collection does not circulate, traditional check-in/checkout procedures, informational and reference tasks are modified in an effort to balance access with

preservation of the collection. Such tasks may seem similar to those performed in an Access Services or Reference department, but standard procedures throughout academic libraries do not always apply in such a department.

As for UCR, the department developed two ways of communicating the specialized nature and purpose of a special collection through a detailed job description and interviewing process before a student employee was even hired. Once UCR hired a student, he or she participated in information and preservation training sessions before working with or around the material.

## **Student Employee Job Description**

When developing a student employee training program there is, first and foremost, a need for staff to convey a clear understanding of the needs of a special collections department. The optimal student employee training program requires a detailed job description, defined hiring practices, and durable training modules. In creating the job description, the UCR staff surveyed and evaluated the tasks that needed to be completed by student employees. Many of the tasks had already been assigned to student employees; however, documentation of expectations, duties and responsibilities, training tools, and delivery format were either limited or non-existent.

Starting in 2010, UCR created a new job description and interview procedures to outline the needs of student employees in the department, along with a revised student employee manual, and a student employee guidelines and standards form. Tolppanen and Derr's (2009) survey of academic libraries Access Service departments identified nineteen core tasks student employees performed, such as check-in/checkout, patron assistance away from the circulation desk, and equipment maintenance (p.316). Depending on the policies and procedures of a special collections department, additional steps may need to be taken into account. For example, instructing the patron on why they are asked to place personal bags in a locker and show photo identification.

Sweetman (2007) also recommends that job descriptions include specific, measurable tasks that the student employee will be responsible for carrying out (p. 48). Given the specialized needs of the department, the following bullet points—which echoed the UCR Special Collections policies and procedures—address specific job responsibilities:

- » Provides professional and timely service to researchers, faculty, students, and staff;

- » Follow basic procedures for the careful handling and preservation of rare materials;
- » Monitors the Special Collections & Archives Reading Room;
- » Ensures security and safety of Special Collections & Archives material being used;
- » Processes rare materials/books for Special Collections & Archives;
- » Pages and shelves books and archival collections within a complex shelf arrangement;
- » Accurately and clearly types detailed information on flags, and folders;
- » Completes reproduction requests for rare books and archival material, following all policies and procedures;
- » Uses a flatbed and overhead scanner to create digital images of photographic prints and documents;
- » Rehouses and labels containers for manuscripts and university archives in accordance with archival standards;
- » Assists with collection maintenance tasks such as shifting, shelf reading, labeling, and keeping areas organized;
- » Assists librarians and other supervisors with special projects;
- » Other duties or special projects as assigned.

For a more detailed job description please see Appendix 1.

## **Hiring Student Employees**

Academic libraries have general interviewing questions, many of which are tailored to an access services or circulation department. There is a need for additional explication when it comes to working in a special collections department. Providing information at the beginning of an interview helps a supervisor correct any misunderstanding or misconceptions about working in such a department. During this process the interviewee can decide if special collections is in fact a place where he or she would like

to work (Reale p.7). At the same time, an interviewee's responses and demeanor help the supervisor evaluate the ability of the student to interact with a patron and communicate effectively. At UCR the revised student interview process after 2010 consisted of twelve boilerplate questions, and an introductory paragraph that provided the interviewee with a clear definition of the difference between general library operations and that of a special collections department:

Special Collections & Archives is a little different than the rest of the library. It houses rare books, manuscripts, and archival materials. Our holdings do not circulate, but may be used in the departmental reading room. This involves more security than the rest of the library. This position has many different responsibilities from monitoring the reading room to processing rare materials, shelving books and archives, and interacting with patrons in person or over the phone. Student employees work when the library is open even if the campus is not in session such as, the summer, and over the Christmas break and spring break (Allison p.1).

## **Training Student Employees**

To ensure quality work and long-term service, training is the next and most crucial step of student employee management. As Farrell and Driver (2010) suggest, scheduling meetings with student employees allows them to ask questions, to get to know their co-workers, and to develop a better understanding of library policies and procedures (p. 189). This creates and fulfills a need for a participatory style of training that should be conducted throughout the supervision of the student employee.

A supervisor must maintain a level of organization, documentation and commitment of time while supervising student employees. Additionally, a supervisor must possess time management skills, particularly the ability to multi-task. As Connell and Mileham (2006) discuss, training student employees demands an ongoing commitment of time and effort, but ongoing training allows student employees to reflect on what they have learned, encouraging retention of knowledge versus a one-shot session (p. 81-2). Development of a training checklist may be the best form of documentation and organization for both a supervisor and student employee. The checklist should include every task a student employee needs to learn to be a successful member of the department (Sweetman p.89). With student employees, it is important to remember that their studies will and always should come first. Their schedules may not allow

a time to work two consecutive days in a row. Providing student employees with a checklist helps them visualize their progress and accomplishments.

## Hiring Packet

Given the fact that most undergraduate students have never worked in a library and that many students are hired for their first job while in college, providing student employees with library and departmental information is a necessity. Farrell and Driver (2010) discuss this briefly and refer to it as providing an “insider’s view of the operation of the library and introductions to each faculty and staff member, including a short description of the staff member’s job responsibilities” (p.189). Furthermore, Sweetman (2007) suggests including an orientation with an overview of the library and an explanation of how student employees’ tasks directly fit into the mission of the department and the library (p.87).

UCR developed a new student employee hiring packet to be presented to new student employees on their first day of employment. It included a welcome letter from their supervisor with a list of the material within the packet. This provided the students with information available to them throughout their training, and gave each student a sense of acceptance within the department. The packet included the student employee guidelines contract, guidelines and procedures manual, evaluation standards, emergency procedures, and the training checklist.

## Format and Delivery

Manley and Holley (2014) state training tutorials should be created in two different formats, voice-over PowerPoint presentations and demonstration video clips (p. 82). Whereas Sweetman (2007) outlines a “show and tell” method to training, stating “when training a student, make sure to show him or her how to do the task at hand, and explain the context for what they will be doing. People tend to retain what they are taught if they are given a context of why various steps are important” (p. 93). A combination of these two suggestions creates a theoretical and practical approach to training, with continual opportunities for conversation.

The UCR special collections department training program approached this style of training through nine different sections. A majority of these sections began with a PowerPoint lecture (delivered by the unit head) and moved to hands-on training sessions. Videos about security, reading room procedures, and stack maintenance provided a visual learning component. Most of the hands-on training sessions used special collection material, or role playing interactions. For example, training was conducted through

the physical handling, rehousing, and retrieving of material, and student employees participated in “pseudo patron” interactions, in person or over the telephone.

## Cross Training Needs

Cross training of student employees can provide a department with employees able to perform multiple tasks. At UCR, the student employees were cross-trained to work in all areas of the department, beginning with mostly project-based work with the collection. This allowed student employees to gain a better understanding of the material within the department and provided them with the tools to deliver a higher level of reference service. In addition, cross training provided the department with multiple backups for Public Service needs including minimal reference and/or retrievals.

Draper, Oswald, and Renfro (2007) discuss the benefit of cross training student employees, stating “because of the cross training, students do not get bored with their jobs and the library has a bigger pool of students to choose from when having to schedule a public service desk” (p. 137). This echoes Sweetman’s (2007) sentiment that engagement of student employees raises their interest level. Cross training has the added benefit of giving student employees the opportunity to acquire new skills and learn new techniques, while providing a needed function to the department and the library.

## Training Checklist

Implemented in the fall of 2010, UCR developed the following nine sections that facilitate the new student employee<sup>1</sup> training module:

1. Administration
2. Security
3. Preservation
4. Stacks Maintenance
5. Reproductions
6. Archival Training
7. Acquisitions and ILS Training
8. Processing
9. Public Service Training

1. For purposes of clarity, student employees will be referred to as employees throughout the rest of the article

The direct student supervisor, support staff member and professional staff responsible for a specific unit within the department conducted the corresponding training section. Given the number of employees hired at one time and depending on their school schedules, new employees often moved through the training together. After a training section was completed, new employees were paired with senior employees to work together, the newer ones shadowing the seniors.

For example, a new employee was paired with a senior employee for an hour a day to work on shelving after completing the stack maintenance section. The senior employee observed the new employee, making sure that proper handling and shelving techniques were being followed. Eventually, the department hoped to move towards a tiered student employee structure, similar to other UC Access Services departments (student assistant 1 and 2), allowing for senior employees to conduct the training sections and oversee new employees. Below are summaries of the training sections. For an example of the training checklist please see Appendix 2.0.

The first section of training was an informational session between the direct supervisor and the new student employee. During this session the new employee received the hiring packet, a tour of the department, met the department head, and reviewed department websites (both public and internal), including the department blog where projects, schedules and announcements were placed, along with the opening and closing procedures and other office needs.

The second section, security, was developed to provide new employees with information pertaining to the security guidelines suggested by the Association of College and Research Libraries Rare Books and Manuscripts Section (ACRL/RBMS) Security Committee. In this section, the focus was on security procedures and why UCR's Special Collections & Archives conducts policies and procedures in such a manner.

In the Preservation section, the Preservationist trained new employees on the proper techniques of handling special collections material. This training was considered a high priority given that such tasks as stacks maintenance, reproductions orders, processing and public service could not be conducted without this basic understanding. It was also an educational tool to help employees build their confidence in following the policies and procedures to be a contributing member of the department.

Section four, stacks maintenance, was developed to train new employees to understand and locate Library of Congress call numbers within the stacks. In addition, staff provided definitions and specific reasons why such tasks and shelving, shelf reading, and shifting needed to be completed, all linking back to the department goals of access and preservation.

Reproductions are key to providing access and public service to a collection, however, preservation is a more important priority. In section five, an employee used the skills gained in the preservation section and continued to build on his or her understanding as to what material can and cannot be reproduced, he or she became capable of explaining, with confidence, the reasoning behind the department's reproduction policies.

In section six, the employee received hands-on-training and worked directly with the department archivist. To reinforce key training lessons, new employees were assigned paging requests for archival material during their shift. A senior employee shadowed the new employee to ensure he or she conducted the process properly. Additionally each new employee received an archival project within the first few months of employment.

In section seven, the training program was to work directly with the Integrated Library System (ILS). Employees learned the different searching options, location codes, and identifying key notes or messages within records. The employee was assigned a search project using recent donations to the collection. Such a project provided employees an opportunity to familiarize themselves with the ILS system. At the conclusion of this training and project employees were skilled enough to handle the first level of reference, limiting the need for assistance from professional staff.

Section eight focused on processing newly cataloged special collections material. Consisting mostly of books, employees implemented techniques and skills learned from other sections of training during the processing of new material. For example, the employees were expected to identify preservation concerns when an item arrived, such as the need for an enclosure. Since employees were the first to see new material entering the department, their understanding of the collection was once again enhanced, contributing to the goal of providing access.

The final section, public service built on the skills learned in sections one through eight and summarized the workflows to facilitate effective public service within the department. Each new employee shadowed a senior employee at the information desk. This gave the new employee a chance to conduct observations and to ask questions of their peers. Senior employees conducted role playing scenarios and reference interviews with the new employee. If a professional staff member was available, he or she would take part in a scenario. For more detail on the training section please see Appendix 3.0.

The amount of time spent on this training depended on the individual employee and his or her personal abilities. However, at this point in the program all of the employees were very excited to move to the information desk, hoping to test what they had learned through their training and to prove what they had accomplished.

## Communication

Training requires both theory and practice and these elements cannot be conducted without some form of communication. The tools to provide training and ongoing management required a level of communication between the employee, his or her direct supervisor, and the department staff. Power (2011) states that training is about communication, which evolves, and training programs must adapt to successfully enrich communication between professional staff and student employees (p.69). At UCR, most of this training was completed via paper or through hands-on practice. However, as the department's professional staff became busier with other duties, communication with student employees needed to be improved.

Jetton (2009) mentions the use of proper distribution methods for training material. "Distribution methods that were reviewed included traditional paper materials, shared folders or directories on a library server, staff Web page, document-management software, blogs and wikis, and course-management software" (p. 24). Following this model, the department utilized a staff intranet webpage to provide electronic access to all training material, along with all needed tools for daily duties of student employees. Further, the establishment of a department blog streamlined communication for projects and department schedules. This tool was very useful in continuing a level of communication between student employees and professional staff.

There were limitations and restrictions with this form of communication. Both Jetton (2009) and Power (2011) state the use of a course management system could be useful. Jetton suggests that courseware can provide tools needed for training, such as built-in student assessment or quizzes (p. 26). Power (2011) states that using Blackboard for training, documentation and communication centralizes the use of technology already used by students (p.70). While this had not been implemented in Special Collections & Archives at UCR, such tools could continue to improve communication and training between staff and student employees through the profession.

## Outcomes of the Training

At the beginning of 2015, a survey was sent to employees who had worked in the UCR Special Collections & Archives Department for the entire four years of their college education, i.e., from 2010 to 2014. Of the eight employees who worked in the department, six answered the survey regarding their experience with the training program. All six respondents indicated

they liked the format of training. When asked to describe what they liked about the training a respondent stated, “[I]t was a gradual process from shelving to working the front desk.” Another respondent also mentioned this gradual move forward and commented on how it allowed each of them to become really good at one task before moving on to another aspect of their work.

The respondents also mentioned their fondness for the structure and organization, stating, “I knew exactly what, why and how I was supposed to complete a task and also I knew what I had to learn next.” Another mentioned the educational aspect of having meetings to discuss the training required to complete certain tasks of working in a special collections department and why that training was important and extremely helpful. Not only did the student employees learn the duties of their job, they also learned the importance and meaning behind working in such a department.

In addition to the training, all the respondents believed they were members of the department’s staff. This was key for student-staff communication, but, more importantly, it added to the development and confidence of the student employees. All respondents felt that being a member and working in the department gave them a better understanding of the library as a whole.

Several faculty members and visiting researchers commented on the excellent service they received from the department after 2010. One faculty member, a frequent visitor, commented in an e-mail to the head of Special Collections & Archives, that after 2010, “student staff became much more organized and professional, clearly much better prepared. The student supervisor did a truly outstanding job of orienting and overseeing the staff.”

From the supervisor’s perspective, retention of student employees was higher and quality of work improved between 2010 and 2014. Student employees had pride in their own job performance and in the overall performance of the department. They were members of the department and communication improved among the professional staff and student employees.

## Conclusion

While this training program was specific to the Special Collections & Archives Department at the University of California, Riverside Libraries, it drew from other peer reviewed training programs and could be adapted to benefit other organizations. Student employees will continue to be a valuable resource in the daily operations of libraries. As Reale (2013) states, “[O]ften, we can get caught up in our own sense of importance and in the satisfying idea of being able to positively influence students, but as my own boss, in her infinite wisdom, consistently reminds me and my colleagues, ‘*It’s not about us.*’ And while we know that, it doesn’t hurt to be reminded” (p. 43). The function of the academic

libraries within the educational profession --whether through instructional sessions, information literacy seminars, or student employment-- is to provide information and access to aid in the development of skills for the next generation, and this applies in particular to the students in our own institutions. Requiring students to follow work schedules, learn useful skills, and meet expectations will give them an edge in finding a place in the workforce once they graduate, or even help guide them in choosing a satisfying career. In some cases, we can hope, that the career they chose will be in the field of library and information science.<sup>2</sup>

2. The direct supervisor left in 2014 for a professional position. It is unclear whether this program is still being implemented.

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## Appendixes

### 1.0: Job Description

#### Student employee Job Description for Special Collections & Archives

Under the supervision of the Reading Room Coordinator and Office Manager, incumbent learns the policies and procedures established by the UCR libraries Special Collections & Archives (SC&A) for working with rare books and archival materials. The schedule for this position is Monday through Friday between the hours of 8:30 a.m. to 5:00 p.m. Students hired to work in SC&A must commit to working summers and during Spring Break.

The student performs the following routine tasks:

- » Provides professional and timely service to researcher, faculty, students, and staff;
- » Follow basic procedures for the careful handling and preservation of rare materials;
- » Monitors the Reading Room and Costo Room;
- » Ensures security and safety of SC&A materials being used;
- » Processes rare materials/books for SC&A;
- » Pages and shelves books and archival collections within complex shelf arrangement systems;
- » Accurately and clearly types or writes detailed information on flags, and folders;
- » Performs basic searches on the online public access catalogues Millennium (SCOTTY) and MELVYL;
- » Completes reproduction requests for rare books and archival material, following all policies and procedures;
- » Uses a flatbed and overhead scanner to create digital images of photographic prints and documents;
- » Rehouses and label containers for manuscripts and university archives in accordance with archival standards;

- » Assists with collection maintenance tasks such as shifting, shelf reading, labeling, and keeping areas organized;
- » Assist librarians and other supervisors with special projects;
- » Other duties or special projects as assigned.

## BASIC QUALIFICATIONS

Strong interpersonal skills with ability to work successfully in an intensely collaborative environment with a broad range of people from culturally diverse backgrounds including colleagues, administrators, students, faculty, donors, and alumni;

- » Ability to perform semi-skilled clerical work (typing, filing, etc.);
- » Ability to arrange materials by Library of Congress call numbers;
- » Ability to perform repetitive tasks accurately;
- » Ability to safely handle rare materials;
- » Ability to perform some manual labor, including shelving books and boxes of up to 25 lbs, carrying supplies, light maintenance and custodial tasks, and shifting of collections;
- » Ability to do basic searches on the online public access catalogues Millennium (SCOTTY) and MELVYL;
- » Ability to operate computers, printers, and scanners;
- » Computer skills sufficient to work with word processing and database software;
- » Public or customer service experience is highly desirable

## 2.0: Student Employee Training Checklist

Student Employee:	Hire date	Before School Year	Winter Break	Spring Break	End of School Year
<b>Section 1: Administration</b> a. Hiring packet b. Tour c. Emergency procedures d. SC&A presentation with Head e. Departmental Manual f. Overview of departmental website g. Opening procedures h. Closing procedures i. Mail Room					
<b>Section 2: Security</b> a. Security PowerPoint b. Reading Room Security c. Sign-in Sheet					
<b>Section 3: Preservation</b> a. Preservation PowerPoint b. Identifying basic preservation needs c. Proper use of book cradles d. Proper handling, shelving, and paging of material e. Proper use of placement of materials on shelving trucks f. Book Jackets g. Proper housing of materials h. Proper reproduction techniques					
<b>Section 4: Stacks Maintenance</b> a. Stacks Maintenance PowerPoint b. Call Numbers and locations c. Call number test d. Shelving e. Shelving test f. Shelf Reading g. Shifting					
<b>Section 5: Reproductions</b> a. Review of Reproduction techniques b. Reproduction requests c. ILL requests					
<b>Section 6: Archival Training</b> a. Archival PowerPoint b. Basic archival terminology c. Overview of SC&A "Flagship Collection" d. Website training e. Overview of Online Archive of California (OAC) f. Locating, paging, and shelving archival materials g. Policies and procedures h. Archival project					
<b>Section 7: Acquisitions and ILS</b> a. Acquisitions and ILS PowerPoint b. ILS Training c. Searching Training d. Comparing Training e. ILS Test					
<b>Section 8: Processing</b> a. Processing PowerPoint b. Book Processing Training c. Processing test					
<b>Section 8: Public Service</b> a. Public Service PowerPoint b. Information desk policies/procedures c. When a researcher arrives d. When a researcher leaves e. Materials being used by a researcher f. Phone etiquette procedure g. Researcher questions over the phone h. Transferring phone calls i. Review of "Sign-In" sheet j. Information desk statistics					

### **3.0: Detailed Training Sections**

#### **Section 1: Administration**

This was an informational session between the direct supervisor and the new student employee. Here, the employee received a hiring packet and time to read the student guidelines and procedures manual, along with the student employee guidelines contract. This contract provided a written expectation of the employee's professional behavior towards researchers and the public, in addition to policies and procedures pertaining to break times and calling in sick. Once the employee reviewed these documents, the direct supervisor provided an opportunity for discussion and questions.

Following this discussion, the employee received a tour of the department and an overview of activities within each unit. On this tour, the employee met all members of the department, and heard a brief description of each staff member's responsibilities and duties. Time was set aside for the employee to meet with the head of the department for a short one-on-one session designed for the employee to gain a deeper understanding of the role of a special collections department.

The last part of this section was dedicated to an overview of departmental communications and daily functions. This included department websites (both public and internal), the department blog where projects, schedules and announcements were placed, along with the opening and closing procedures and other office needs, such as mailroom runs. While this section was time consuming, it was important for the employee to have an overview of the basic elements of the department. This aided in the other sections of training, most specifically to the Security Section.

#### **Section 2: Security**

This section, along with others in the training, provided time for employee feedback and discussion, continuing a participatory style of training. Designed to provide information regarding the guidelines suggested by the Association of College and Research Libraries Rare Books and Manuscripts Section (ACRL/RBMS) Security Committee, this session outlined policies pertaining to a special collections department. A PowerPoint presentation provided the history of ACRL/RBMS, the Security Committee, and detailed recommendations for maintaining a secure department. In addition to reading the section in the student manual and viewing the presentation, each employee received a review of the departmental security procedures from his or her direct supervisor and the head of the department. Here, the focus was

on security and why UCR's Special Collections & Archives conducts policies and procedures in such a manner.

During this session, the employee had a chance to answer questions pertaining to such security procedures. For example, recommendations from the Security Committee outline elements of a secured reading room. The direct supervisor provided this information through the PowerPoint presentation (in addition to the department tour and material within the hiring packet) and then asked the employee to name one of the department's policies that facilitated a recommendation from the Security Committee. This allowed the student to show what he or she learned and for the direct supervisor to observe the employee's level of comprehension.

It was very important for an employee to understand the need for following the security policies and procedures of the department to ensure access for future generations. Educating new employees on the "dos and don'ts" of security within the department helped provide a foundation of knowledge and room for professional growth.

### **Section 3: Preservation**

UCR developed the section to train employees on the proper technique of handling special collections material. Many employees have little or no experience with such material. It was discussed and determined by the staff members that the understanding of preservation policies and procedures should be a high training priority. Such tasks as stacks maintenance, reproductions orders, processing and public service could not be conducted without this basic understanding.

The preservationist designed and facilitated this training, which consisted of a PowerPoint presentation introducing policies and procedures and then a hands-on training session, which included handling and using the material, proper stacks maintenance techniques, and minimal level preservation work. During this training, new student employees learned how to identify and correct basic preservation problems including how to house materials in Mylar enclosures; how to create custom protective book jackets; how to handle materials properly during photocopying or scanning projects; how to shelve and remove items from the stacks; and how to identify stacks maintenance issues such as too-tight spacing or crowding that could damage fragile material.

Through this preservation training, employees learned how to take care of material within the department. This provided them with a foundation of knowledge to better provide superior public service, to feel confident in following the policies and procedures, and to be able to contribute to the overarching goals of a special collections department.

## **Section 4: Stacks Maintenance**

To ensure consistency, UCR used a PowerPoint presentation to discuss the three areas of stacks maintenance: shelving, shelf reading, and shifting. The direct supervisor provided definitions and specific reasons why these tasks needed to be completed, all linking back to the department goals of access and preservation. The training included instruction on the use of the Library of Congress call numbers and the many locations within the stacks for different types of materials; the importance of shelf reading and its value in protecting and preserving the collection; and shifting. While the first two areas were the main focus of this training, shifting was project based, requiring in-depth training when needed. However, providing basic information on how and why shifting occurs gave the employee a sense of understanding with regard to general library functions, further developing the employee's understanding of the department and library as a whole.

Connell and Mileham (2006) suggest spreading training throughout the year (p. 81). Continual training within the stacks maintenance section allowed an employee to develop their understanding of the department's collection at their own pace. Once stacks maintenance training was completed, employees conducted daily duties such as shelving and ongoing shelf reading, along with assigned stacks projects. Reale (2013) suggests that professionals can help student employees see their place in the library as an extension of the classroom where they will learn skills that can extend way beyond their college experience (p. 45).

For example, on many occasions, completion of a task, such as shelving, sparked an employee's interest. Given the opportunity to physically work with the collection, employees gained additional knowledge of the material within the department. Many of them saw the new material added to the collection and asked questions as to why such an item would be housed in the department. Such discussion and the additional knowledge of the collection aided the employees in conducting their public service duties more efficiently. This gave the employee the tools needed to answer basic information and reference questions, provide access and promote the collection.

## **Section 5: Reproductions**

Reproductions are key to providing significant access and public service to the collection. Preservation, however, is a more important priority. The skills learned in the preservation section were vital and follow-through became very important. Additionally, once an employee gained a level of understanding as to what material can and cannot be reproduced, he or she is capable

of explaining, with confidence, the reasoning behind the department's reproduction policies.

During this training, employees also learned the workflow for reproductions. The preservationist provided a refresher session on how to handle material on the reproduction equipment within the department (photocopier, scanner, and camera). Once completed, the new employee was paired with a senior employee when a reproduction request came through. The senior employee took the lead and moved through the workflow explaining every step to the new employee. Eventually, the new student would be assigned and complete reproduction requests independently.

## **Section 6: Archival Training**

Similar to the preservation training, the department archivist conducted this portion of the training. A PowerPoint presentation provided definitions and examples of archival and manuscript collections, along with an overview of the flagship collections within the department. An employee received training in locating archival collection records in the library catalog and through the Online Archive of California.

The employee received hands-on training, working directly with the archivist, on the archival workflow for paging/retrieving material from different locations throughout the department. This included filling out the paging/retrieval slip, identifying the location within the stacks, and proper paging technique. To reinforce key training lessons, UCR assigned new employees paging requests for archival material during their shifts. A senior employee shadowed the new employee to ensure he or she conducted the process properly. Additionally each new employee received an archival project within the first few months of employment. This included, but was not limited to, rehousing new accessions, scanning projects and minimal level processing in Archivist Toolkit.

## **Section 7: Acquisitions and ILS Training**

After physically working with the collection through projects and daily tasks, an employee began training on the Integrated Library System (ILS). Most employees had limited experience with the online catalog and no experience with the staff mode of the ILS. Providing behind-the-scenes information, the ILS was key to understanding the system and completing the basic duties assigned to an employee.

Beginning with a PowerPoint presentation outlining the different searching options, location codes and identifying key notes or messages in records, an employee conducted a searching project using recent donations to the

collection. This type of project provided employees with hands-on experience to familiarize themselves with the ILS system and explore possible additions to the collection. During these projects the employees asked questions about cataloging, publication information and book editions which provided an educational opportunity for the direct supervisor to expand the employees' understanding of publishing and collecting. The happy result of this aspect of their training was that employees became skilled enough to handle the first level of reference, limiting the need for assistance from professional staff.

## **Section 8: Processing**

Employees were responsible for conducting all book processing of newly cataloged special collections material. In most institutions there are specific stages to processing, including steps involving levels of security and control, which should be conducted within the department. As with most libraries, the only way to locate material in the stacks is via a call number. When material arrived in the department, an employee was charged with checking the cataloging records for the correct location and cataloging date, which are needed to provide access to material within the department. An understanding of the ILS was required to conduct this task.

This training began with a PowerPoint presentation that discussed the different types of flags, bookplates, and labels used to process material. An employee received instructions on the workflow along with examples of the dos and don'ts of processing. After the presentation, the employee worked alongside a senior employee, to physically process new material.

The new employees implemented techniques and skills learned from other sections of training during the processing of new material. For example, the employees were expected to identify preservation concerns when an item arrived, such as the need for an enclosure. Since employees were the first to see new material entering the department, their understanding of the collection was once again enhanced, contributing to the goal of providing access.

## **Section 9: Public Service**

Building on the skills learned in sections one through eight, this final section summarized the workflows to facilitate effective public service within a special collections department. Conducted by the direct supervisor, a PowerPoint presentation outlined general public service etiquette, public service procedures, specific policies and procedures of the reading room, and workflows for patron use of material and reproduction requests, along with basic reception duties. Then each new employee shadowed a senior employee at the information desk. Draper, Oswald, and Renfro (2007) reinforce the importance of this part of

training stating, “[O]nce a student has done the tutorials they are scheduled to work at the Information Desk with another student who is proficient at working that desk” (p. 136). This gave the new employee a chance to conduct observations and to ask questions of their peers.

Based on Standfield and Palmer’s (2010) survey, role playing scenarios and reference interview training are the most beneficial for student employees with regard to reference duties (p. 637). Senior employees conducted scenarios with the new employee. If a professional staff member was available, he or she would take part in a scenario. This was beneficial in developing the new employees’ comfort level while serving at the information desk and to simulate the workflows outlined in training. The amount of time spent on this training depended on the individual employee and his or her personal abilities. However, at this point in the program all of the employees were very excited to move to the information desk, hoping to test what they had learned through their training and to prove what they had accomplished.