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Published six times per year, SPEC Kits contain the most valuable, up-to-date information on the latest issues of concern to libraries and librarians today. They are the result of a systematic survey of ARL member libraries on a particular topic related to current practice in the field. Each SPEC Kit contains an executive summary of the survey results; survey questions with tallies and selected comments; the best representative documents from survey participants, such as policies, procedures, handbooks, guidelines, Web sites, records, brochures, and statements; and a selected reading list—both print and online sources—containing the most current literature available on the topic for further study.

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SURVEY RESULTS
EXECUTIVE SUMMARY

Introduction
What comprises socialization in research libraries and archives? Black and Leysen define socialization as “how librarians assimilate the culture, values, and perspectives of the library, the university, and the profession.” Ballard and Blessing describe socialization in a broader context as “the process by which employees learn about new jobs, roles, and the culture of workplace.” Organizational culture, which has a significant impact on the socialization process, plays several key functions: shaping organizational identity; fostering collective commitment; building social stability; and allowing people to make sense of a new environment.

Given the challenges that newcomers experience in research libraries and archives, effective socialization is critical. Such challenges may include a highly demanding workload; time management; communicating and working within a large bureaucracy; acquiring knowledge and skills in specific areas (such as collection development and liaison work); and experiencing the transition from school-to-work. Research libraries and archives have used various strategies to facilitate effective socialization of newcomers. Black and Leysen note that effective recruitment is critical to meaningful socialization, and assert that libraries “are increasingly at a disadvantage if they do not actively work to ensure the best fit between candidate and institutional profile.”

Janice Simmons-Welburn and William C. Welburn assert that formal orientation programs are an important component of socialization for newcomers, as they satisfy information needs “in the face of uncertainty.” Research libraries also use mentoring and residency programs to acclimate newcomers (including librarians of color).

Designed to complement SPEC Kit 239, Mentoring Programs in ARL Libraries, the SPEC survey on socializing new hires explores broader organizational socialization programs and activities in ARL member institutions. The purpose of the survey is to investigate the progress made in ARL member organizations to establish or enhance socialization programs and activities (such as orientation programs, mentoring, residency appointments, and staff development sessions directed at organizational acculturation) for all newly hired, paid employees. It explores the availability and types of programs, activities, and resources currently offered in ARL institutions; staff involved in designing and coordinating socialization programs and activities; goals and budget for socialization programs; length of participation in programs and activities; evaluation and assessment of programs; and benefits of socialization programs, activities and resources.

Availability and Types of Socialization Programs, Activities, and Resources
Sixty-five of the 126 ARL member institutions (52%) responded to the survey. Fifty-seven respondents (88%) report offering programs, activities, and/or resources for socializing newly hired, paid employees into their organizations. While eight respondents (12%) report that they do not currently offer socialization programs or activities, some of those institutions nevertheless noted the value and importance of such efforts. For example, one library indicated that planning socialization programs will be the first priority for a new director of staff development.
Research libraries and archives increasingly focus on effective socialization for all new hires. Fifty-two institutions (91%) reported that their programs and activities are designed for all newly hired, paid employees. Orientation sessions and related resources are the most widely reported and are typically offered to all new hires. Forty-seven of the 51 respondents that use orientation checklists specifically report using them for all new hires.

While the majority of respondents offer some socialization activities for all newly hired, paid employees, certain programs are much more likely at this time to be offered to librarians only. For example, 28 organizations (50%) indicated that they offer formal mentoring programs; of those, 22 report that mentoring programs are designed specifically for librarians and only six provide formal mentoring for all new hires. Respondents describe specific approaches (formal and informal) to facilitate mentoring for librarians. Examples include a “buddy” system to facilitate social networking, peer mentoring, and assigning library faculty mentors to guide new librarians through the tenure process.

Research libraries and archives use a variety of methods and approaches for socializing new hires. Thirty-eight respondents (68%) reported using staff development sessions to enhance the socialization process, while 22 organizations (39%) report using a pairing system (other than mentoring) to facilitate job shadowing or coaching. Only seven institutions (13%) report offering a residency, fellowship, or similar program. Twenty respondents (36%) report using other methods and approaches for all new hires, and/or for specific categories of staff. Selected examples of activities for all new hires include library tours, lunch and/or coffee with administrators and/or peers, and meet and greet events. Selected examples of activities for librarians include faculty committee meetings, informal meetings for untenured faculty, and a “new librarians’ roundtable.”

Responding institutions also offer socialization programs as standardized, group events and/or as individualized, one-on-one activities and sometimes offer programs both ways. For example, 21 respondents offer individualized job shadowing and/or coaching (only two respondents describe job shadowing and/or coaching as standardized activities). On the other hand, more often than not, orientation and staff development sessions are standardized offerings; the reverse is the case for formal mentoring programs, which are much more likely to be individualized. It is of note that in all cases some libraries offer a specific program in both ways.

Respondents reported that their libraries also provide (and are currently developing) a variety of resources to support socialization programs and related activities. Examples include orientation checklists; policy manuals; brochures; training documents on topics such as collection development and instruction; audiovisual materials (such as a welcome video from the Dean of Libraries); welcome packets and notebooks; and electronic sources (such as a Wiki listing various procedures and policies). While selected materials (such as faculty handbooks) are targeted to librarians, respondents indicated that socialization resources are generally developed and offered for all new hires. Responding institutions noted that resources such as faculty handbooks and policy manuals are increasingly available online (replacing physical copies).

**Designing and Coordinating Socialization Programs/Activities**

Design and coordination of socialization activities are generally a shared effort, with complementary responsibilities. For all categories of staff, the immediate supervisor plays the key role in coordination of socialization activities, and the HR/Personnel Officer follows closely. Although the immediate supervisor has a similar level of responsibility in program design for other professional staff and support staff, the HR/Personnel Officer has a notably stronger role in the design of socialization programs for librarians (23 responses for the HR/Personnel Officer, as compared to only six responses for the immediate supervisor).

Noteworthy are how frequently library committees have responsibility for socialization, especially for librarians (16 institutions), and how varied the committees are. The importance of preparation/support for tenure or continuing status responsibilities.
is the likely reason, as evidenced by the number of comments citing promotion and tenure committee involvement in socialization activities. For support staff and other professional staff, the Staff Development Officer is somewhat more likely to be involved than a library committee (eight to nine responses for the Staff Development Officer, as compared to seven for a committee).

Goals and Budget for Socialization Programs

By far the primary goal is to communicate the organizational culture of the library, as cited by 54 institutions (95%). An additional seven goals were selected by 56%–75% of respondents, including those relating to: performance evaluation, promotion and tenure, inclusion, retention, training in specific areas, organizational culture of the campus/parent institution, and professional culture of librarianship. Among other goals described, several institutions seek engagement and identification with the larger entity, communication of the library’s strategic plan and mission, and introduction to the local community.

There is a sense from respondents’ comments that budgeting is not a major issue. Many institutions fund socialization activities from general library funds/operating budget or a combination of library, university, and private funds. Occasionally, the library staff association will fund specific events. A number of institutions report that little or no budget is needed, with costs limited to staff workload.

Length of Participation in Socialization Programs and Activities

The time frame for completing each socialization activity is logically shaped by the nature and scope of each program. Socialization for new hires is an ongoing process, and can vary based on the individual needs of each new employee. For example, respondents describe the individualized nature of job shadowing or coaching, and note that the relationships developed through this activity can last well beyond a specific time frame. As mentoring can also facilitate the development of long-term professional relationships, the time frame for this activity also varies considerably. Other socialization activities have more specific time frames. For instance, orientation programs are typically completed during the first six months to one year on the job. Respondents also noted that orientation activities are often completed in stages, starting with a checklist on the first day or week, and involving meetings (over a period of several weeks or months) with staff from the human resources unit, the immediate supervisor, and/or other colleagues.

Evaluation and Assessment of Socialization Programs

Fewer than half of the respondents (24 or 43%) have tools in place to solicit feedback from participants for evaluation, with an additional 13 (23%) reporting that they plan to develop a process. Surveys, individual interviews, and focus group meetings are typical approaches. Other tools include evaluation forms, breakfast or lunch with the dean or administrators, and exit interviews.

Research libraries and archives utilize various measures of success, with feedback from participants as the largest single response. Also cited are employee and supervisor satisfaction, morale (with one institution specifically seeking improvement as measured by an annual ClimateQUAL® survey), retention rates, and achievement of tenure. One respondent has two simple measures: does the mentee volunteer to become a mentor; and does the mentee encourage other new staff to participate in the mentoring program.

Benefits of Socialization Programs and Activities

Respondents report a wide variety of benefits accrued from socialization programs and activities (for the organization as a whole, as well as for new hires). Socialization programs and activities facilitate general orientation and acclimation to the organization and its culture. Through meeting and getting to know colleagues more quickly, new hires establish a network of contacts within and outside the organization. Respondents also note that new hires receive the necessary tools and support to learn and do their jobs effectively, which enhances and increases productivity. Survey respondents also reported that socialization programs facilitate learning about how to be successful in the promotion and tenure process, which can
increase retention. Socialization activities can also shape and reinforce a collegial environment, which benefits the entire organization.

**Conclusion**

The purpose of the survey was to investigate the progress made in ARL member organizations to establish or enhance socialization programs and activities. Survey results clearly demonstrate that socialization activities are widespread and growing in research libraries and archives. The volume of response and detailed sample documents provided are indicative of the prevalence of existing activities and institutional commitment to these programs. There is a perception of the critical importance and value of these activities to the enhancement of organizational success. The plethora of comments on the benefits of socialization programs indicates that ARL members highly value these efforts.

Orientation programs are ubiquitous. Staff development is second only to orientation as a socialization strategy for all new hires. Somewhat surprising is the relatively low number of institutions that report having a residency or fellowship program.

We were specifically interested in the current status of mentoring programs, because there is ARL data from 1999 in SPEC Kit 239, *Mentoring Programs in ARL Libraries*. At that time, only 26% of respondents reported formal mentoring programs. In the current survey, half of the respondents report the existence of a formal mentoring program, representing a doubling in twelve years. Several cite university mentoring mandates for faculty. In addition, 39% have other pairing arrangements, such as job shadowing or coaching. We anticipate that mentoring will continue to expand as a socialization tool over the coming years.

It is clear from the comments that there is a great deal of interest in improving existing programs and offering new activities. ARL institutions have produced an impressive array of concrete resources that are now available through this SPEC Kit to support the development or expansion of a variety of socialization strategies. The results are rife with creative ideas to enhance existing programs. The authors identified several practices that would strengthen their institution's mentoring and orientation activities. It is not, however, clear from the results which activities produce the best results, as little formal assessment has occurred.

Survey results point to the need for development and future research in the area of assessment. More than half of the respondents have or plan to develop tools for evaluation of socialization programs; however, feedback from participants through surveys or other means is by far the most utilized approach at this time. Without more concrete assessment tools, it is difficult to point to the more successful strategies.

In particular, further research is needed to evaluate the impact of socialization activities on retention and success in tenure or continuing status. Each is cited by more than two-thirds of respondents as an important goal. Similarly, promoting an inclusive workplace is a highly rated goal. It would be valuable for libraries to know the most effective strategies to support those goals, which requires determination of outcome measures and appropriate assessment techniques.

Based on the generalized responses to the budget queries, it is clear that libraries have made a significant but largely unmeasured investment in socialization programs in terms of staff time and other resources committed to these activities. As libraries develop greater capacity for assessment, it may prove fruitful to collect data to evaluate the return on investment for the individual strategies of orientation, formal mentoring, less formal pairings such as job shadowing or coaching, staff development, and residency programs.

Recognizing the importance of socialization efforts, more than one respondent proposed that libraries need to focus more on the continuing socialization of all groups of employees, not just new hires. That too is an area for future exploration.

ARL member institutions are strongly engaged in a wide variety of socialization activities and report significant benefits to both the individual and institution. Continued growth is anticipated.
Endnotes


The SPEC survey on Socializing New Hires was designed by Sharon Ladenson, Gender Studies and Communications Librarian; Diane Mayers, Human Resources Administrator; and Colleen Hyslop, Senior Associate Director and Head of Human Resources, Michigan State University Libraries. These results are based on data submitted by 65 of the 126 ARL member libraries (52%) by the deadline of March 18, 2011. The survey’s introductory text and questions are reproduced below, followed by the response data and selected comments from the respondents.

Socialization is defined by Black and Leysen1 as: “how librarians assimilate the culture, values, and perspectives of the library, the university, and the profession;” and in a wider context by Ballard and Blessing2 as: “the process by which employees learn about and adapt to new jobs, roles, and the culture of the workplace.” Given the challenges that newcomers experience in research libraries—such as highly demanding workload; time management; communicating and working within a large bureaucracy; acquiring knowledge and skills in specific areas (such as collection development and liaison work); and transitioning from school to work—effective socialization is critical.

In 1999, ARL published SPEC Kit 239, Mentoring Programs in ARL Libraries. Only 26% of the respondents reported having formal mentoring programs. The survey identified wide and varied benefits to the mentee, mentor, and institution and provided lessons and guidelines for the development of mentoring programs.

Since 1999, there has been increased focus in research libraries and in the literature on broader organizational socialization issues and programs. The main purpose of this survey is to explore what progress has been made in ARL member libraries to establish or enhance socialization strategies—such as mentoring, orientation for new hires, residency appointments, and staff development opportunities directed at organizational acculturation—for all newly hired, paid employees. Issues to be explored include:

- Current availability and types of socialization programs, activities, and resources in ARL libraries
- Staff involved in designing and coordinating socialization activities
- Organization, budget, and goals for socialization programs
- Rate and length of participation in socialization activities
- Evaluation and assessment of socialization programs
- Primary benefits, impact, and outcomes of socialization activities

The survey will also gather documentation about ARL member libraries’ socialization plans and programs and provide a benchmark for progress toward implementation of socialization strategies.

**BACKGROUND**

1. How many librarians has your library hired in the past two years? N=62

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2. How many other professional staff has your library hired in the past two years? N=62

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4. Does your library offer programs, activities, and/or resources that are intended to socialize newly hired, paid employees into the organization? N=65

| Yes | 57 | 88% |
| No  | 8  | 12% |

Selected Comments

I am filling out this survey in the context of an orientation program that I run for employees new to the Library Services service unit of the Library of Congress. We run three programs a year for 20 staff each who have all been hired by Library Services within the last five years. It is for all levels of permanent staff.

New Employee Orientation - Buddy System: library staff mentor is assigned as the new employee’s “buddy” for a year. Orientation checklist is provided to supervisors of all new hires which includes review of policies and procedures, tours, introductions to colleagues, meetings with senior administrators, etc.

Orientation, department orientations, annual holiday party, annual meet the new folks, and librarian peer mentoring. Our on-boarding activities are fairly significant, including pre-hire, post-hire, and long-term activities.

There is an orientation program that is not very active, but supervisors do make an effort to ensure that new librarians are oriented. Individual departments will ‘socialize’ newly hired staff differently, depending on need and position.

We have a Library Staff Association for all new hires. We have an informal peer librarian “Socializer” assignment for new librarians. We have GOLD, an organizational learning and development team that offers activities.

We have an orientation program for all new permanent employees. We also hold new staff coffees three times per year.

We have orientation activities for all regular employees, but far fewer for graduate assistants and student employees.
Socialization Programs, Activities, and Resources

5. When are new hires informed about your library’s socialization programs, activities, and/or resources? Check all that apply. N=57

- Upon arrival at the library: 47 (83%)
- During an orientation session: 36 (63%)
- During the interview process: 31 (54%)
- Upon being hired: 29 (51%)
- Other time: 10 (18%)

Please describe the other time.

- Announcements via email.
- Weekly staff bulletin via email.
- Immediately prior to starting.
- Informal communication with supervisor prior to start date.
- Ongoing from supervisor and colleagues.
- Orientation and socialization are ongoing processes; information is mentioned informally as the supervisor works with the employee and as new activities, policies, and processes are implemented.
- Personal invitation to annual luncheon of new employees and library managers.
- Varies by unit.
- When new/refresher programs are offered.
- When they are invited to participate in the Library Services New Employee Orientation Program.

Additional Comments

Contact is made immediately prior to the person starting by the Director of Planning, Assessment, and Organizational Effectiveness, the immediate supervisor, and by the mentor. A meeting to begin orientation is scheduled for approximately one month after the start date.
Critical information is provided during the selection process in a “Joining the UA Libraries” packet to be sure candidates are aware of the UA Libraries’ team-based organization in particular and other cultural or unique factors in our environment. The first day of work involves meeting with the Libraries’ HR and orientation begins. A new employee notebook is provided which details everything from library-wide work-related policies to pay information, phone directory, brief history of the organization and its org structure, the Libraries’ mission, vision, and principles, governance structures, types of employees, general expectations of employees and team leaders, and a full description of the performance management, career progression/merit award, and communication systems. There is also more detailed information about several related topics to explain our culture. It covers, in particular, areas where the Libraries differ from the university in how it operates.

Currently, we do not have a centralized orientation and socialization program in the library, but several units and departments have their own.

Information about socialization programs during the interview process is part of library faculty recruitment.

Most staff find out about this program when they are contacted to participate, although now that more staff have been involved it is becoming more widely known.

Tenure track candidates are informed of the Faculty Mentor program during the interview process. After a candidate is hired, a “match” is determined based partially on professional focus and partially on personality.

We have a multi-session “New Employee Orientation Program” that all new career staff attend. In addition, most departments and supervisors provide information about such programs and activities within the unit.

6. Does your library offer socialization programs/activities for all newly hired, paid employees or for specific categories of staff? N=57

<table>
<thead>
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<th>Category</th>
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<td>All newly hired, paid employees</td>
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<tr>
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<td>9%</td>
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<tr>
<td>Other professional staff</td>
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<td>Support staff</td>
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Selected Comments

All newly hired, paid employees

All career employees attend a multi-session “New Employee Orientation Program.”

All employees receive some kind of orientation but the degree varies considerably. The supervisor covers the work duties, work-related expectations of student (and all other) employees, but offers no “socialization” with other student employees. For GA’s, there is a welcome session for library student GA’s but not for other field GA’s. Regular employees (librarians, other appointed professionals, and staff) all follow a fairly standardized process of new employee orientation (NEO) to the Libraries.

Currently, there is more emphasis on socialization for library faculty than there is for library staff.
Socialization excludes student workers, they do receive an orientation. But socialization does include GRA student workers.

Tailored to each employee group: librarians, professional (other), support staff.

Temporary hourly employees not included.

The university provides an “on-boarding” process for all new employees. The library does not provide its own orientation to all.

We tell new hires about our Library Staff Association and its various activities throughout the year.

**Librarians**

For librarians we do this consistently. For professional and support staff it is done at the supervisor’s discretion.

Librarians select a “mentor” to assist them throughout the tenure process.

Librarians have a special faculty welcome and mentorship program.

There are activities in place, but they are more structured for librarians.

**Librarians and Other Professional Staff**

A general orientation for non-professional staff is determined by their supervisor and varies within each department or team.

**Librarians and Support Staff**

Librarian activities are more formalized; support staff left up to department.

7. **Please briefly describe how your library introduces new hires to their colleagues (e.g., reception, email announcement, featured on Web page, etc.) N=57**

Note: More than forty respondents indicated that email is used to introduce new hires. Respondents indicated that they used a variety of methods (in person and electronic) to introduce new hires, such as newsletter announcements; introductions at meetings, receptions, and social events (such as lunches and coffee breaks); and supervisor introductions of new hires to colleagues (as part of a general orientation to the library).

**Selected Comments**

A message is sent to the library’s electronic mailing list; librarians are generally featured in spotlights on the library’s website and staff newsletter (electronic). Individual departments have overall responsibility for the orientation of new employees to the workplace.
All new hires are welcomed in our weekly e-newsletter. Hiring managers are expected to identify the people most likely to be working with the new hire and make appropriate introductions.

All staff are introduced by their supervisors on LibNews-L, the library listserv, on the first day of employment. Library faculty are introduced at the first faculty meeting they attend after their start date. There is a joint reception in the fall to welcome all new faculty to the library and to GSLIS.

An announcement of the new appointment is included in the bi-monthly HR update that is sent to all library employees. To announce new librarian hires to faculty colleagues on campus, an announcement is included in the campus newspaper along with the employee’s picture.

An email announcement is sent prior to their start date. They are introduced at the first “Dean’s Corner” (meeting of all employees) after their arrival. All new employees are given a tour of the libraries. The immediate supervisor also introduces them in their department. Supervisor checklist of departmental activities includes meet the employees, lunch on the first day, and assigned mentor/buddy.

An email is sent to all library staff a day or two after the new employee arrives. During the first few days the supervisor walks the new staff member around to the most relevant departments and branches making introductions along the way. At the next library-wide meeting of all library staff, supervisors introduce any new staff they may have. In the introduction they give a bit of information about the person’s background and previous employment as well as what they will be doing in their new position.

Announcement of hire made in dean’s weekly update & blog. New faculty & professional staff & library science grad assistants are introduced at faculty meeting. Faculty candidates also meet others during interview.

Announcements on our internal listserv before the new hire starts work. New Employee Spotlight in staff newsletter. Introductions at faculty and all-staff meetings. Reception to meet colleagues outside the libraries for new dean.

Departments generally coordinate their departmental receptions or lunches. All new hires are announced via email by the Director of Libraries. Also, new staff are recognized at all-staff meetings (held twice or more per year) and at new staff coffees (held approximately three times per year).

During a new hire’s first day, the individual meets with their manager. Their manager then introduces new hires to their colleagues. New hires are also featured in the monthly publication of “Declarations,” an agency staff newsletter.

Email announcement prior to arrival. Welcome reception in department. Introductions to immediate co-workers on first day and colleagues throughout library system in following weeks. Tours are conducted by department staff for newly hired staff in other library departments.

Email announcement, one-on-one meetings with various employees as part of orientation, and welcomed/introduced at library-wide meetings.

Email announcement, weekly email updates, in-unit tours, invitations to participate on committees, projects, staff luncheons, university-wide orientation (colleagues across campus).

Email announcement to all staff, personal introduction to colleagues in same unit, and introduced at council meetings (for academics and professional staff).

Email announcement, departmental tours, introduction at twice-yearly meetings of library staff association (all library employees), quarterly library faculty meetings, and quarterly welcome luncheons.

Email announcement; supervisor is responsible for arranging in-person introductions and a tour/walkabout throughout the entire library; one-on-one meeting with dean after six weeks or so.
Faculty attend university-wide reception as well as library faculty receptions. New staff send a library-wide email to all other staff announcing their start date, position, office location, contact information, and other information they choose to share. Unit heads and supervisors often lead the introductions of new staff to their colleagues.

In the case of new librarians and supervisors, announcements are sent out to all library staff. Everyone new is listed in the staff newsletter.

Lunch with search committee members. Coffee break with team members. Lunch with colleagues on their first day of employment. Orientation meetings with colleagues and other managers (one-one-one). Email announcement. Personal introductions by manager.

“Meet and greet” events, announcements made during monthly all-staff meetings, email announcements of new hires sent to all staff. Welcome committee meets with new staff, and mentoring opportunities for both classified/support staff and professional librarian & other professional staff.

New hires are introduced at library-wide town meetings and via email from their supervisor to all staff. Some departments hold a “coffee klatch” for new arrivals.

One of the suggestions in a strategic planning group that focused on new employees in Library Services was to mount brief introductions on the LS staff intranet. The form has been designed but that feature has not yet been implemented, awaiting transfer of the LS staff intranet to a new platform. In terms of initial introductions to colleagues, that is handled at the individual team level by the supervisors and team members.

Regular employees (of all kinds) are first mentioned in “hire announcements” from the team leader to the Libraries’ all-staff listserv. This provides notice of their name, position, and a short summary of their background/qualifications. Regular employees are welcomed at the first available all-staff meeting (generally one per month or so), and provided pretty much the same information with a bit more personal information such that other employees might take an interest in them (hobbies, etc.). There are newbie breakfasts held for regular hires with the Dean of Libraries (used to be quarterly but now as long as once a year, depends on the number of hires).

Supervisors and the new employee will visit all the different department. Supervisors will send a “welcome” email to the staff listserv. Departments will schedule training sessions with library staff.

The library hosts a formal orientation program, featuring the university librarian and other members of the Library Cabinet. This is in addition to the campus-sponsored New Employee Orientation. New librarians are invited to a luncheon hosted by the Librarians Association of UCLA (LAUC-LA) on the day of the orientation. LAUC-LA is an advisory group, one of ten divisions of the system-wide Librarians Association of the University of California (LAUC). UC librarians are academic appointees but they are not members of the Academic Senate (i.e., they do not have tenure).

There are announcements of all new hires in the weekly Library Newsletter, which goes to all library employees. There is an annual ice cream social organized by the Amity Committee to which new hires are specifically invited. New librarians are introduced at the regular monthly meeting of the Librarians’ Forum.

Training Coordinator escorts new employee around library to introduce to staff. All-staff meeting introductions. New librarians/professionals get mentors and join New Librarians and Library Professionals Group for first three years.

We announce new hires in our weekly (online) Staff Bulletin. The Library Staff Association includes a “New Faces” profile with photo in its monthly newsletter. Our (online) Library News introduces new librarians to campus faculty and students. New faculty are introduced at each monthly Library Faculty Meeting.

We have town meetings generally once per month and at the beginning of those meetings we do staff transitions. New employees are then introduced by the supervisor or the HR Manager to all the staff present. We make a point of
welcoming new department heads to members of the Department & Council Representatives meeting and at Faculty Council meetings. New hires are taken around by the supervisor or HR Manager on their first day to meet other members of the department and other administrators. Email regarding new hires is also sent out to the entire staff by the supervisor.

We send out an email announcement with a short description of the person, their hobbies, interests, education, etc.

8. In the matrix below, please indicate the types of socialization programs/activities your library offers for new hires and whether they are targeted to all newly hired paid employees or to specific categories of staff. Check all that apply. N=56

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</table>

Please briefly describe the “Other activity” targeted to all new hires.

All new hires review workload, responsibilities, work-related expectations and processes they will handle or be involved in. Work-related expectations vary by classification (type of hire). Librarians often shadow peers to learn “ways” that this library uses to perform librarian duties. If librarians are Continuing Eligible, there is a guidelines document distributed. Staff are hired with a six month probationary period, including a three month review and a 5.5 month review.

Formally introduced by supervisor to library staff at quarterly coffee breaks (2 to 3 minute introduction with info about work, education, hobbies, etc.)

In addition to attending a quarterly orientation session held for all new employees, each new employee has a specially tailored orientation program based on their position. All new permanent hires are invited to a university-wide orientation session coordinated by the HR Division.

Library tours, meeting with all administrative units, lunch with supervisor/co-workers.

Lunch with Executive Group, committee fair.

Meet and greet events, email announcements, announcements during “all-staff” meetings.

Meeting with safety coordinators for the work area.
Meetings arranged with selected other relevant staff to include social as well as work-related conversations, tours, introductions to other staff, etc.

New employee luncheon.

New employee meeting held every 18–24 months. Supervisors receive orientation to library management policies, procedures, and practices.

University-wide orientation program.

Please briefly describe the “Other activity” targeted to librarians.

Group meetings of new librarians and professionals who have been at library for three years or less.

Informal get-togethers of untenured faculty; quarterly one-on-one meetings with the deputy dean throughout tenure process.

LAUC-LA is developing a mentoring program for librarians. The purpose of the program is likely to be two-fold: a more formal program that pairs mentors and mentees, based on goals, and a more informal “buddy” system to foster social connections among librarians.

Meetings with faculty committees, deans.

New librarians are paired informally with a “Socializer” peer librarian from another department.

New librarians are required to participate in the “new librarians roundtable”—orientation meetings held one time per month for two years.

Our Librarians’ Association schedules a special orientation meeting with each newly hired librarian within the first month or two of employment.

Peer mentoring.

Reference creates a training schedule for each new hire. This will include meeting with staff from other parts of the library.

Please briefly describe the “Other activity” targeted to other professionals.

Group meetings of new librarians and professionals who have been at library for three years or less.

Please briefly describe the “Other activity” targeted to support staff.

Reference creates a training schedule for each new hire. This will include meeting with staff from other parts of the library.

Additional Comments

Each new hire attends an orientation session conducted by the university’s Human Resources Management.

Mentoring program for faculty librarians is quite new and is currently voluntary.
Methods of training/orienting to the job vary widely by the need of the individual (say the person is fresh out of library school so needs more involved orientation to librarianship and particular focus on this library). Some teams are highly structured in terms of required training modules and time frames and other teams are very loose in terms of their requirements, supervision, and job shadowing and in what is provided to individuals (little instruction; more on-the-job, in-the-moment Q&A; little coaching or supervision). In the same way there is considerable variation in what is required for output (one time requires up-to-date calendars and email and is rigorous about tracking output especially by data; and others do not). Sometimes a buddy or colleague is assigned to assist or “familiarize” the new employee and sometimes there is little attention to this or no one is available depending on workload. New employees are encouraged to attend library-wide meetings or team reports as well as join in wellness activities or diversity workshops. Most departments have some amount of socialization activities that they undertake with new staff. There is no standardization of these programs so they vary considerably in terms of activities and the amount of time devoted to them.

Orientation: New Employee Breakfast. Meet colleagues from other departments. Meet university librarian. Libraries’ Faculty Advisory Board introduces new librarians at monthly faculty meetings (pastries/donuts, juice are served). Mentoring Program: Each newly hired librarian is assigned a mentor for one year. Newly hired professional receives coaching from colleagues in the employee’s department and from colleagues in other departments. Newly hired support staff shadow one or more current employees.

Orientation is provided at the department level, and varies by department.

Purpose of new library professionals group is socialization and introduction to the culture, profession, and some skills building.

There is a formal orientation and training program for new reference librarians, but it is only for reference librarians. There is a one-day orientation briefing that is offered to all new Library of Congress hires offered by the Human Resources division. The Library Services Program is eight separate sessions over approximately five weeks.

These activities are also included for existing staff who have internally transferred to another library or unit. Staff development opportunities is a whole separate category handled separately.

We are in the process of developing a centralized orientation session for all new hires, but we are still 4 to 6 months from implementing it.

<table>
<thead>
<tr>
<th>9. Please indicate whether the socialization programs/activities for new hires are standardized/group events or individualized/one-on-one activities. Check all that apply. N=55</th>
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<td>Orientation sessions</td>
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<td>Residency, fellowship, or similar program</td>
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<tr>
<td>Other activity</td>
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</tbody>
</table>
10. Please describe the typical time frame (e.g., within the first two months on the job, one year, until program goals are met, etc.) for new hires to complete each type of program/activity offered by your library. N=52

Orientation Sessions N=51

- First day (3 responses)
- First two days
- First week (3)
- First two weeks (3)
- First month/one month (8)
- First two months (5)
- First three months (6)
- First four months
- First six months (3)
- Within the first year/one year (6)
- Until goals are met (3)

Other time frame:

"Day 1," basic information; university orientation within 30 days of hire; "organizational orientation" within 30 days. During first few days; university-wide: as sessions are scheduled.

First day on job in Library Personnel; up to several months in department.

One-on-one orientation checklist with supervisor (within 1st 2 weeks), one-on-one meeting with HR (within 1st month), and quarterly orientation with other new staff (within 1st 3 months).

Orientation sessions take place the first day, the first week, and the first month to six weeks from the employee's start date.

The general timeframe is 6 months to 1 year to learn a job. Internal HR orientation is immediate to 8 weeks. Team much longer. Some orientation is standardized and some is individualized such as for such a type of position. Some orientations are group events and some are individual or one-on-one activities. See website for standardized, group activities. Team leaders or other supervisors provide the majority of orientation to the employee in their work responsibilities; first assessing how much they know and developing a plan of what they need to learn. Milestones are assigned.

The new staff member will attend the university's orientation program the first Monday the new staff member is here.

We target staff for our program that have been in Library Services from six months to five years.

With most department/branch: received feedback, now do gradually over more than two months because recent hire found extensive orientation interfered with learning the core duties of the job.
Formal Mentoring Program N=27

- First week and ongoing
- First 3 months
- First 6 months (2)
- First year (5)
- Throughout the tenure process (6)
- Continuous/ongoing/ throughout the career (4)

Other time frame:

- Anytime at the individual’s request.
- During the first month of employment, each newly hired librarian is assigned a mentor for one year.
- Incumbents asked that they be allowed to get to know people in the organization (over three months) before being assigned a formal mentor.
- Mentoring may occur informally for librarians and for GA’s. Library faculty has an internal organization which meets monthly and staff have a board of elected representatives who participate with Library Faculty Association in governance in Library Cabinet.
- Mentoring program goes on until the faculty member achieves promotion and tenure. Some continue beyond that date.
- This could last from 3 to 5 years. General librarians (one-year contracts) may request to have mentors.
- The six-year faculty probationary period.
- The program begins within the first month of employment and lasts as long as necessary. Typically this is a minimum of through the first reappointment and then is an on again off again process. The professional relationship is established and called upon when necessary.

Other Pairing, such as job shadowing, coaching, etc. N=18

- Assigned pairing upon hiring.
- First day
- Within 1 to 2 months
- First few months
- 2 to 3 months
- Within 3 to 6 months of hire
- Until goals are met
- Ongoing
- Throughout career
Based on program goals; this activity is very individualized.

During the first week of employment, each newly hired professional is given a schedule to meet with multiple coaches during the first four weeks of employment, but the relationships go well beyond that timeframe. Job shadowing for newly hired support staff takes place during the first month.

For the most part, this is probably individualized but some teams make a habit of providing job shadowing for certain positions, particularly those serving public desks, for example, or for learning connection development (librarian). Different people on a team may be assigned to assist a new employee in learning specific tasks or shadowing. Coaching is provided by the team leader or other supervisor (or Sr. Librarian) as needed.

New librarians in some divisions are paired with colleagues for up to six weeks.

New reference staff members will shadow at the reference desk before formally being assigned desk shifts.

Supervisors complete a library checklist with new employee beginning the first week; department heads are responsible for orientation and job training.

This is done on an individual unit level and is much less formal and predictable. Some are only a few hours or a few days, while others are longer.

Up to several months in department.

Within the first year, new employees need more coaching and the development of informal relationships provides support; management "matches up" the new hire with experienced colleagues for counsel and direction.

Residency, Fellowship, or Similar Program N=7

- One year
- Two years (4)
- Every three years
- Entire residency period

Other Activity, please specify N=19

Activities vary considerably. Most of these occur within the first month of employment.

All but the annual recognition program take place the first month of employment. During the annual recognition program a new faculty member of the year and a new staff member of the year is chosen.

Campus has a formal welcoming event for faculty and APs once a year. The library and GSLIS has a reception for new faculty each fall.

First month: Meetings with faculty committees, deans.

First week or month: Meet & greets and announcements (some announcements are prior to their start date).

Mandatory EEO training occurs online through the Learning Management System (LMS) within the employee’s first 30 days. Thereafter, LMS offers employees access to training and professional development courses online throughout their tenure.
Meetings with other relevant, individual staff members begin at about two weeks & last from two to six months.

New employee meeting held every 18 to 24 months.

Ongoing: professional development.

Other activities can happen sometime between the first two to six months.

Reception: first two weeks after hire.

Reference creates a training schedule for each new hire.

Review of the newbie notebook is three to six months along with probationary cycle for classified staff. Performance management and promotion & continuing status system are ongoing. There are luncheons for the “junior (assistant)” librarians about every six weeks with the Dean of Libraries. She discusses issues facing librarians here or nationally; she may send out articles. There is no specific staff development per se except some funding for professional workshop attendance.

Staff development session: within four months. Annual new employee luncheon: within one year.

Supervisors and department heads are encouraged to orient new employees to the home department within the first 3 months of hire.

Three years: Group meetings of new librarians and professionals who have been at library for three years or less.

Throughout the year, the Chief Information Officer/Chief Librarian hosts several events for all staff members as a means of building community: Welcome back coffee break (Fall); Bar-b-que/Tail Gate Party (Fall); Long Service Recognition Celebration (Fall); Holiday Party (Winter); Ice Cream Day (Summer).

Until faculty librarians reach tenure: Informal get-togethers of untenured faculty; quarterly one-on-one meetings with the Deputy Dean throughout tenure process.

Within first 3 weeks: Meeting with safety coordinators for the work area.

11. Please indicate what kinds of resources your library offers new hires to support socialization programs/activities, and whether they are targeted to all newly hired, paid employees or to specific categories of staff. Check all that apply. N=57

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</table>
Please briefly describe the “Other resources.”

All new hires are provided with strategic planning brochures (including our People Plan brochure).

All regular hires receive a new employee (newbie) notebook as described previously. Librarians have web access to materials on promotion and continuing status, professional activities funding. Librarians are provided training documents on such topics as collection development, providing instruction, various policies and processes aligned with these subjects, etc.

Each librarian is connected with a mentor to act as a resource for various areas to include general environment and reappointment and promotion. We also have an orientation listserv developed to provide networking and social opportunities for librarians and professional staff. Orientation committee activities.

Job-related training, i.e., specific Voyager training, etc.

Reference guides, training manuals.

We do not have a single policy manual available, rather the public, university and internal library policies are available on-line.

Web sites, various handouts. Various handouts about the campus (map), policies, Austin (if they have relocated for the position).

Welcome packet: Orientation Checklist, Benefits brochures, Contacts List by Topics, Campus Map, Gym Membership Forms, Organization Chart, Organizational Communication Practices.

Wiki describing various policies and procedures.

Additional Comments

All policies are online so no need for a physical manual. AV resources if the position needs that information. Various handouts are tailored to the type of position and may change throughout the year.

An orientation checklist was developed by the strategic planning group that made recommendations for the new employee orientation program for Library Services. It is given to supervisors of new employees as a recommendation of topics they should make sure to have been covered with new staff.

Policy manuals: Represented librarians and staff are given a print copy of the university/union agreement.

The faculty handbook is online (only) and offers detailed information to all University Libraries faculty from the local culture to the RPT process. There is also an Hourly Employee Guidelines PDF that is provided to all new hourly hires.

The library as a whole does not provide each new employee the exact same materials. These materials are provided at the department level as appropriate to each employee and department.

We are in the process of developing audiovisual resources, including a welcome video from the Dean of Libraries, but it is not currently available.

We have a "Joining the Library" packet (that is) supposed to be sent by email to all interviewees before the interview. We provide brochures on Life & Work Support, campus shuttle, parking rates, benefit options, list of new employee orientations, and required trainings. We offer brochures on many other topics that can be provided as needed, such as disability resources, etc. Teams may provide their own work-related expectations documents as well. We provide
several maps: of campus, of parking, of the Libraries. We provide information card about IT support. Of course, we provide new hires with a position description.

**DESIGNING AND COORDINATING SOCIALIZATION PROGRAMS/ACTIVITIES**

12. Please indicate which group or individual has the primary responsibility for designing and/or coordinating socialization programs/activities. Check all that apply. N=57

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Please briefly describe the “Other” group or individual and their role.

Employment Development Committee. Various units offer to coordinate such opportunities as webinars. Campus HR Training and Development offers weeklong supervisory training program.

Human Resources administrative support person. We’ve also recently established the Organizational Development Team and they will be involved in reviewing and designing future socialization programs.

Library committee coordinates initial orientation. Supervisor makes introductions. Administration supports group events twice a year which are usually one retirement reception and one staff appreciation reception. Individuals within the departments address day-to-day socialization.

Peers, colleagues.

The person responsible depends on the position.

The team leader is the primary person responsible for most critical aspects of orientation and may delegate pieces or the whole to the employee’s immediate supervisor. With non-regular hires such as GA’s and other student employees, it is extremely likely that immediate supervisor will take this on. All employees received some orientation even if it is just a brief overview of policies and employment expectations along with a checklist; these are provided by the Libraries HR. The Libraries has selected one employee (Director of Marketing/PR) to liaison with the library school around graduate assistantships and she does handle a few aspects of the recruitment and selection process of GA’s. Her role is larger with respect to one program of GA’s—the UA has a Knowledge River program for minority library school students and she facilitates/coordinates their selection and placement within the Libraries. She also provides an initial orientation.
meeting at the beginning of the fall semester to the library school student GA’s. All employees are required to complete a few training sessions (public service, sexual harassment prevention, computer security awareness) that have been designed by central HR or other university-level department.

The university’s HR department designs and presents a day-long standardized orientation to all new regular staff to introduce them to the campus.

University Human Resources, Equality Administration, Faculty Affairs, and the Training & Development office within HR.

Additional Comments

Associate Directors and HR Officer send email announcements. HR Officer designs and presents the first part of the library orientations (direct supervisor finishes the library orientation). Two separate committees are responsible for other socialization and mentor activities.

HR/Personnel Officer serves on the Staff Learning & Development Committee. The whole committee is responsible for designing/coordinating the orientation day program. The HR/Personnel Officer is responsible for designing the orientation checklist, and the supervisor implements it.

The immediate supervisor primarily coordinates the orientation for all new hires.

Librarians N=45

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<tr>
<td>Other</td>
<td>11</td>
<td>9</td>
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</tbody>
</table>

Please briefly describe the “Other” group or individual and their role.

A departmental training committee.

Associate Dean for Organizational Development designs and coordinates the New Librarians and Library Professionals Group.

Different people offer different guidance. Librarians also coordinate a program of “welcome.”

Faculty Relations; UBC Librarians and Archivists Association; UBC Financial Services; informal forums; colleagues – peers.

For non-administrator librarians, who are part of the faculty bargaining unit and who are subject to the faculty-like processes for contract renewal, promotion, and regular appointment (tenure), the Promotion and Regular Appointments (PARA) Committee elected by the Academic Assembly of Librarians provides an information session for new librarians about the PARA processes, timelines, and requirements.
Human Resources administrative support person. We’ve recently established the Organizational Development Team and they will be involved in reviewing and designing future socialization programs.

LAUC-LA hosts and invites new librarians to a luncheon held on the day of the library’s formal orientation program. For the past few years, LAUC-LA has been developing a mentoring program that is likely to have a two-fold approach: formal mentoring and informal “buddy” pairings.

Promotion and Tenure Committee offers annual program and workshop for untenured librarians.

Specifically, the three associate deans through whom all librarians report have designed the orientation for new librarians.

The information get-togethers for untenured faculty are coordinated by the untenured faculty. The quarterly one-on-one meetings with the Deputy Dean are coordinated by the Deputy Dean.

Two Libraries’ HR work team members, along with a small cross-library project team, designed new hire program and sessions for all regular employees within the past 10 years (massive overhaul). The program was co-coordinated by each expert with my assistance. The team leader is the primary person responsible for most critical aspects of orientation and may delegate pieces to senior librarian or colleagues as seen fit. The Library Faculty Association (LFA) provides some socialization in and of itself. Librarians involved in the promotion and continuing status process will be involved with the P&CS committee at some point and receive orientation as needed throughout their careers. Colleagues will also be involved in informal mentoring, formal or informal training, and ‘orientation’ to the Libraries’ processes and procedures.

Additional Comments

Associate Directors and HR Officer send email announcements; HR Officer designs and presents the first part of the library orientations (direct supervisor finishes the library orientation). Professional Staff Affairs committee is responsible for other socialization and mentor activities.

The Tenure Track Faculty Mentor Program is implemented by the College Advisory Council and the Associate Dean.

Other Professional Staff N=38

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<td>9 7 7</td>
<td></td>
</tr>
<tr>
<td>A library committee</td>
<td>7 7 6</td>
<td></td>
</tr>
<tr>
<td>Colleagues of higher rank</td>
<td>7 6 3</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>5 5 3</td>
<td></td>
</tr>
</tbody>
</table>

Please briefly describe the “Other” group or individual and their role.

Associate Dean for Organizational Development designs and coordinates the New Librarians and Library Professionals Group.
Colleagues, peers; Association for Management & Professional staff.

Human Resources administrative support person. We’ve recently established the Organizational Development Team and they will be involved in reviewing and designing future socialization programs.

The team leader is the primary person responsible for most critical aspects of orientation, but if there is a work team within the larger functional team, may have delegated supervision to the work team leader as seen fit. The Staff Governance Association (SGA) is a library-based organization of classified staff and it provides some socialization in and of itself thru bi-yearly meetings and occasional social events. As a team-based organization, colleagues may also be involved in formal or informal ‘orientation’ or training regarding the Libraries’ processes and procedures.

Support Staff N=39

<table>
<thead>
<tr>
<th></th>
<th>N</th>
<th>Designing N=35</th>
<th>Coordinating N=37</th>
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<tbody>
<tr>
<td>Immediate supervisor</td>
<td>35</td>
<td>25</td>
<td>31</td>
</tr>
<tr>
<td>HR/Personnel officer</td>
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<td>Staff Development officer</td>
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<tr>
<td>A library committee</td>
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<td>6</td>
</tr>
<tr>
<td>Colleagues of higher rank</td>
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</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Please briefly describe the “Other” group or individual and their role.

Sometimes colleagues: peers or cross-unit peers.

Human Resources administrative support person. We’ve recently established the Organizational Development Team and they will be involved in reviewing and designing future socialization programs.

The team leader is the primary person responsible for most critical aspects of orientation (and likely this employee’s immediate supervisor) but may delegate pieces to colleagues as seen fit. There is no “other appointed professionals” organization within the library. As a team-based organization, colleagues may also be involved in formal or informal ‘orientation’ and training regarding the Libraries’ processes and procedures.

Additional Comments

The Library Staff Association (LSA) plans and organizes twice-yearly events to facilitate informal conversations among library employees at all levels, across the organization. A representative of LSA speaks at the library’s formal orientation program.
## GOALS FOR SOCIALIZATION PROGRAMS/ACTIVITIES

13. What are the primary goals of your library’s programs and/or activities for socializing new hires? Check all that apply. N=57

<table>
<thead>
<tr>
<th>Goal</th>
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<tbody>
<tr>
<td>Communicate the organizational culture of the library</td>
<td>54</td>
<td>95%</td>
</tr>
<tr>
<td>Communicate the process and requirements for performance evaluation</td>
<td>43</td>
<td>75%</td>
</tr>
<tr>
<td>Communicate the process and requirements for promotion and tenure</td>
<td>39</td>
<td>68%</td>
</tr>
<tr>
<td>Promoting an inclusive workplace</td>
<td>39</td>
<td>68%</td>
</tr>
<tr>
<td>Promoting retention</td>
<td>38</td>
<td>67%</td>
</tr>
<tr>
<td>Training in specific areas, such as collection development, instruction, and/or liaison work</td>
<td>33</td>
<td>58%</td>
</tr>
<tr>
<td>Communicate the organizational culture of the campus/parent institution</td>
<td>32</td>
<td>56%</td>
</tr>
<tr>
<td>Communicate the professional culture of librarianship</td>
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<td>56%</td>
</tr>
<tr>
<td>Describe opportunities for collaboration/group work</td>
<td>24</td>
<td>42%</td>
</tr>
<tr>
<td>Describe opportunities for scholarly research and getting published</td>
<td>20</td>
<td>35%</td>
</tr>
<tr>
<td>Developing skills for collaboration/group work</td>
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<td>28%</td>
</tr>
<tr>
<td>Other goal</td>
<td>13</td>
<td>23%</td>
</tr>
</tbody>
</table>

Please describe other goal.

Another goal of the orientation session is to expose the new employees to the collections and staff not housed in the main library. The university has orientations which accomplish some of the other goals listed above, such as organizational goals and evaluation processes.

- Communicate information about educational opportunities.
- Communicate information about professional development opportunities.
- Communicate the research culture of the organization.
- Convey the organizational structure of the library, provide an overview of functional areas beyond the new hire’s own, encourage identification with the larger entity (not just the immediate work group).
- Describing and explaining our unique culture, mission, and principles; our team-based organization (substructures and governance system); the systems model and process improvement models by which we operate; strategic planning and performance effectiveness management system (PEMS); clarifying and reinforcing work-related and performance expectations and ensuring that team is planning and implementing learning goals for the new employee specific to their work and the work of the team. At the same time, the NEO project team recognized the value in socialization and promoting a welcoming, supportive environment for the new employee to the workplace and the costs of hiring and training new employees, so a comprehensive program was put in place. We took care to stagger some of the initial overload for the new employee and allow time to absorb and reinforce new learning. We recognized the often steep
learning curve for the new employee and thus developed the Foundations sessions to comprehensively and consistently train new employees in the Libraries’ team culture, key processes, and philosophy. As part of the Foundations sessions we included “working in teams” and facilitation skills/effective meetings as well as other hands-on tools for participating successfully. We included, optionally, a session on personality assessment and understanding of different types (and consequently how the differences might hinder or help teamwork).

Develop staff to help them reach their potential.

Encouraging engagement in the library in a broad sense of understanding what others do to accomplish the vision/goals.

Facilitate personal networking; provide introduction to the local community.

Introduction to cultural opportunities, restaurants, possible social & civic groups, hairdressers, etc. in the community.

Since Library Services and the Library of Congress are large institutions, our principal goal is to give new staff information that allows them to put their own work into a larger context. For example, acquisitions and bibliographic access staff are often unaware of outreach programs, and technology policy may be unaware of the resources and staff devoted to preservation. We try to give an overview of all areas to inform and increase appreciation for the overall work and mission of Library Services. We also want staff to enjoy and learn about additional benefits of working at the Library and on Capitol Hill so that it is not “just a job.”

Social networking and interaction.

To communicate the strategic plan for the library and its supporting strategies; to communicate our “people” vision and supporting strategies; to provide practical information pertaining to the person’s bargaining unit.

14. Please briefly describe how socialization programs/activities are funded. N=35

General library funds/general operating budget (5 responses)

No budget/Costs limited to staff workload (8)

Other Funding:

A combination of funds from the training budget and from private funds.

By Hospitality Committee, by the Libraries general or discretionary funds.

Cost is supported by the library administration.

Except for programs at the institutional level such as the benefits seminar for new employees, there is not a separate line of funding for socialization programs/activities. The welcome lunch for new employees is funded by the staff association to the extent that they pay for the new hires’ lunches and anyone else who attends goes Dutch treat.

From operating funds or development funds.
Funding for socialization programs comes mostly through the HR/staff development budget line. Funding from departmental hiring and training budgets and library funds allocated for Learning and Development.

Libraries’ Foundation Accounts and Libraries’ Staff Association (LSA sponsors fundraisers with half of the proceeds going to charity and half going to fund programs and activities for all faculty and staff).

Library budget. University-wide orientation from university budget.

Not much funding needed or required. If we need, funded by general library fund.

Operating funds and staff workload.

Our socialization programs/activities are funded primarily through the library’s operating budget, although some activities are funded centrally through the university administration such as the New Faculty Orientation sessions and luncheon.

Primarily funded by library and the university depending on the program.

Primary accomplished using existing resources. Some expense provided by HR budget.

Some are centrally funded by the university; other programs are funded by the Libraries while others require the use of the educational assistance or professional development funds of the employee.

Some programs are funded by the department allocations, other are funded through volunteer collaboration.

The Libraries’ HR has funding in its operating budget to support the New Employee Orientation Foundations sessions and provide meals during them. In the past we provided more booklets and materials and paid for licensure with MBTI certified instructor. Now that we don’t have in-house experts in the NEO Foundations and conflict resolutions modules, we have to rely on “other funding” to provide special catch-up sessions. There has been sporadic funding of training in project management from a national facilitator but now we can provide it in-house. We have worked with central HR to see about substitute facilitators, with only some success (they are understaffed as well). LFA and SGA groups have limited team events funding.

The library’s formal orientation program is funded by staff development funds. The LAUC-LA luncheon for new librarians is funded by monies allocated to LAUC-LA by the university librarian. LSA events are funded by member dues and donations.

The library/GSLIS faculty fall reception are funded by the university librarian out of gift funds. The annual recognition of new employee’s reception is funded by the university librarian, who gives a budget to the social committee for a variety of events, around $1200. The dean also provides additional funds as needs are identified.

Very little funding is required; minimal funding from library administration budget is used, as needed.

Vice Provost discretionary funds are used.

We do it ourselves or send employees to (free) campus training. The Library Staff Association funds its own activities with dues contributions.
EVALUATION OF SOCIALIZATION PROGRAMS/ACTIVITIES

15. Has your library developed any tools to solicit feedback from participants to help evaluate the success of your socialization programs/activities? N=56

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<tbody>
<tr>
<td>Yes</td>
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<td>43%</td>
</tr>
<tr>
<td>Not yet, but we plan to</td>
<td>13</td>
<td>23%</td>
</tr>
<tr>
<td>No</td>
<td>19</td>
<td>34%</td>
</tr>
</tbody>
</table>

If yes or planning to, which tools does/will your library use to solicit feedback from participants? Check all that apply. N=35

<table>
<thead>
<tr>
<th>Tool</th>
<th>Count</th>
<th>Percentage</th>
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<tr>
<td>Surveys</td>
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<td>69%</td>
</tr>
<tr>
<td>Individual interviews</td>
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<td>49%</td>
</tr>
<tr>
<td>Focus group meetings</td>
<td>14</td>
<td>40%</td>
</tr>
<tr>
<td>Other tool</td>
<td>8</td>
<td>23%</td>
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</table>

Please describe the other tool.

Dean and associate dean have lunch with new cohorts of library faculty to learn about their experiences.

Meetings with staff organizations and committees.

New hires are invited to breakfast with the Dean of Libraries each fall.

Our newly formed Organizational Development Team will undertake to solicit feedback from new hires.

The Classified Staff Affairs committee has designed a feedback tool for their mentor program, but has not had an opportunity to use it yet. The Professional Staff Affairs committee has not designed any feedback tools for their mentor program.

We ask each attendee to complete an evaluation form after completing the New Employee Orientation Program.

We developed forms for participants to evaluate every one of the eight components of the program.

We may also consider exit interviews.
16. What measures of success does/will your library use? N=31

Feedback from participants (8 responses)

None at this time (4)

Other Measures:

At this time the overall measure of success is when a tenure track faculty member obtains tenure.

Determining if employees are knowledgeable about necessary policies and procedures. Aware of internal and external contact to gain more information. Fully trained and equipped to be effective in their job. Collegial and tolerant atmosphere. Retention numbers for librarians and professional staff.

Employee and supervisor satisfaction.

For many years, I participated on the campus-wide Provost’s Committee on Retention. This committee surveys those who leave. We offer opportunities for those people to be interviewed as well, to try to analyze what can be done differently for retention. The library dean, or a designated AUL, holds exit interviews with all librarians, if they desire. Supervisors hold exit interviews with all graduate assistants who matriculate, and the head of Library Human Resources meets with all staff members who leave.

For the luncheon, library managers debrief each year. Often, individual staff express appreciation either in person or via email following the luncheon.

In a web-based survey following the new employee orientation, we ask new employees what one or two new things they learned, what questions they still have, and ask them to suggest three ways we can improve the program. We may also review enrollments in campus training courses to determine how many new employees have taken advantage of these opportunities.

Link to strategic plan directions and goals.

Our hiring and intake procedures are currently in a process of moving from a central campus HR-centric model toward one administered by the library to a larger extent. With this change we are creating a hybrid process that coordinates with central HR. We have undertaken needs assessment to identify gaps to be filled and undertaken development/refinement of processes and tools. We have developed and are meeting our formative or process goals. Shortly, we will begin developing appropriate outcome or summative goals and their specific measures for our hiring and acculturation programs.

Our measure of success is when the individual indicates to us as part of our feedback collection process that they felt that the orientation activities provided them with the appropriate information that they needed in their early days on the job.

Our orientation is evaluated by new hire satisfaction survey feedback and retention rates.

Ratings on evaluations, retention statistics.

Results from both surveys and focus groups help continually reshape our programs.

Retention, morale.

Satisfaction on the part of the new employee, also input from mentors, supervisors.

Self-report, observation of engagement, team work, and retention.
Strategic Plan goal achievement. Individual employee achievement of performance goals. Overall improvement on annual ClimateQUAL® survey.

Two measures of success: 1. Does the mentee volunteer to become a mentor? 2. Does the mentee encourage any new staff they may supervise to participate in the Mentoring Program?

Use data to see if programs make a difference, improve program planning, ensure best use of funds and demonstrate impact.

We respond to suggestions by tweaking the course or changing elements around. We also provide feedback to individual presenters based on information in the evaluation forms. Our motto is “continuous improvement.”

**BENEFITS OF SOCIALIZATION PROGRAMS/ACTIVITIES**

17. Please briefly describe up to three primary benefits for participants of your library’s socialization programs/activities. N=52

Note: Primary benefits noted by respondents included meeting and getting to know colleagues; establishing a network of contacts within and outside of the library; acclimating new hires to the organizational culture; facilitating general orientation to the organization; facilitating support for learning about the promotion and tenure process; and getting to know the organizational culture.

**Selected Comments**

Getting oriented to colleagues, work assessment, and environment. Acquaintance with professional development opportunities. Knowledge/expectation of performance appraisal standards (staff) and peer review process (librarians).

Helps new hires develop a network to support them in their role. Enables individuals to feel they are an important part of the organization, builds a sense of community. Encourages collaboration between co-workers.

Meet the university librarian (UL) and other members of the Library Cabinet; connect their faces and names; hear about the scope of their assignments. Learn the strategic priorities of the library from the UL directly. Gain a better understanding of where the employee and his/her department fit into the library as a whole.

Employees feel supported and valued by the organization. Employees receive the necessary tools, knowledge, and support to do their jobs and enhance their promotional opportunities. Employees gain a better understanding of the organization's culture and mission.

Develop contacts, collaborators, research assistance, or professional development. Receive/impart knowledge about the UGA Libraries from a perspective beyond one’s own departmental colleagues or supervisors. Identify library staff and faculty who have interests corresponding to professional research projects and/or have similar community and civic interests.

1. Because of the large size of this institution, it is helpful for all levels of staff to be able to maneuver this large organization. Orientation and socialization help reduce the anxiety of new employees. 2. Orientation and socialization
activities help develop coworker relations & social networks, which can lead to career opportunities down the road. Ultimately, individuals will have higher job satisfaction because they feel that the organization cares about them.

1. Become more productive quickly. 2. Establish contacts/supports. 3. More effectively integrate into the organization.
1. Faster acclimation to new workplace. 2. Greater awareness of staff development opportunities. 3. Have developed one good working relationship with their mentor.
1. Feel welcomed and more comfortable. 2. Meet managers across the library to feel more inclusive. 3. Integrate more quickly.
1. Help new employees understand the organization and culture of the Libraries and feel they are valued members of the organization. 2. Convey the mission and values of the organization to employee so he/she can represent the library professionally on campus and beyond. 3. Inform the employee about job expectations, performance evaluation, compensation, rights, responsibilities, benefits, etc.
1. New tenure track faculty have a personal relationship with a tenured, established faculty member who will help the new faculty member navigate the intricacies of the RPT process. 2. The mentor - mentee relationship helps the new faculty member understand the work culture of the university in general. 3. This relationship often becomes a friendship that spans work and non-work related activities.
1. Obtain new skills. 2. Staff better informed. 3. Improved programming.
1. Speeds assimilation into organizational culture. 2. Provides resources and contacts. 3. Cultivates relationships with staff beyond immediate work area.
1. To learn about the culture of the library and the university. 2. To receive emotional support/inclusiveness - become part of the family. 3. To help more inexperienced librarians and staff to develop professionally.
1. They can hear from the senior leadership of the library about the library’s vision, mission, and supporting strategies. This helps them to ‘connect the dots’ as to how their job supports the achievement of the library’s vision. They also get to meet the dean and senior leadership. 2. They can understand how the library’s strategic plan connects to the university’s strategic plan. 3. They benefit from planned activities which are felt to be advantageous to new hires.

Expands personal contacts. Provides new hires with a sense of where they fit into the larger organization and a sense of connection to a larger process. Provides support for the P&T process, and an understanding of general performance expectations.

Know where to get assistance/describes appropriate workflow. Know whom to approach for help. Know tools and process relevant to their responsibilities.

Knowledge about the organizational culture. Useful knowledge about evaluation and promotion procedures. Opportunities to network with other employees. Solid resources to effectively navigate the environment.

Knowledge of the organization and areas with which they will interact. Feeling of being welcomed and valued. Understanding of cultural expectations and acceptable behavior.

Meeting and building collegial working relationships with other library staff members at all levels; receiving useful information about the library, the university, and the organizational culture; having some fun.

New employee feels like there is a plan for them to be oriented to the library and the university. Librarians quickly learn about the functions performed in all departments and meet all staff. Redundant coverage of topics as well as printed copies of information help ensure that employees have received vital information.
Participants gain knowledge of library and campus culture. Mandatory trainings are clearly laid out. Librarians receive mentorship as they progress toward tenure.

Participants begin to understand the local culture. Participants begin to understand the work environment.

Participants get to meet new people and understand the culture better. Participants are oriented and trained so that they understand the expectations. Participants make friends and find mentors.

Participants report an increased feeling of welcome, and comfort in knowing someone outside the unit (mentoring).

Provides an introduction to the librarian promotion process. Provides flexibility and is geared to the particular needs of the new hire. Our informal mentoring program is an opt-in opportunity rather than a requirement.

Social and professional networking; understanding of library & university policies & procedures; training in their essential job functions or learning the local procedures.

The participants get to know the library’s HR staff. The participants have resources for navigating our unique culture. The participants have an opportunity to contemplate and communicate their staff development needs.

They acquire a better understanding of the library’s culture and how they fit into the organization. They get to know their peers better and become part of a network of young professionals they can rely on for support. They become more engaged in library activities while developing essential skills.

Understand employee benefits; understand process for appointment, reappointment, tenure/promotion (librarians), leaves, professional development; introduction to the university and library environment and welcoming activities.

18. Please briefly describe up to three primary benefits for the library of your library’s socialization programs/activities. N=51

Note: Primary benefits noted by respondents included increasing productivity; developing and reinforcing a collegial environment; increasing job satisfaction and retention; and facilitating success in the promotion and tenure process.

Selected Comments

1. Promote a sense of community among Libraries employees. 2. Enhance productivity by developing motivated and knowledgeable staff. 3. Connect the individual to the overall mission of the Libraries.

1. Become more productive quickly. 2. Establish contacts/supports. 3. More effectively integrate into the organization.

1. Develops collegial atmosphere. 2. Communicates organizational values (service, diversity, intellectual freedom, etc.) 3. Encourages participation and communication.

1. Ease on-boarding. 2. Encourage early participation in staff development sessions. 3. Better retention.

1. Promotes collegiality. 2. Helps bring out the best in our staff so that they can make the most of the resources available to them. 3. Helps promote a healthy constructive workplace.
Acclimate to the university, library. Retention. Inclusion.

An effective orientation has a great impact on the new employee’s job satisfaction, helps to get the new hire successfully acclimated to the agency, and results in better job performance and retention.

Better informed and thus better prepared faculty who understand the promotion and tenure system; faculty who have a mentor to help acclimate them in addition to their supervisor.

Better informed employees. Improved moral. Faculty librarians who are more likely to succeed in attaining tenure and promotion.

Building a common understanding of the library. Retention. Broader knowledge of library.

Employees with adequate knowledge of the organization’s policies and procedures. Good staff retention. Socialized employees who are effective in a collegial and collaborative work environment. Productive and content employees.

Enhance new hires’ ability to work productively on teams not only with their own departmental colleagues or supervisors, but also with colleagues library-wide. Decrease learning curve of new hires role recognition and task expertise. Facilitate the continued professional development of faculty and staff.


Foster inclusive, welcoming environment. Enhances collaboration. Retention.

Gain feedback from new employee participants about how to improve our orientation programs and processes (via questions asked during the program and responses to the survey). We have an opportunity to update the strategic message to new employees, e.g., the statistics/measures reported to ARL and shared with others, such as campus decision-makers, potential donors.

Getting people to fully participate in research and state/national service activities. Assimilate new hires into the organizational culture. Getting people educated in how the library operates so they can become fully participating employees.

Greater personal satisfaction at work for new & longer-term staff and thus improved performance. Greater efficiency & effectiveness of staff. Improved retention.

Helps individuals build personal relationships which in turn fosters trust and leads to the sharing of ideas. Improves productivity and staff morale. Keeps staff engaged which in turn improves services to users and patrons.

Identification with the larger entity. Increased cooperation and cross-functional interaction. Decreased “fit” issues due to ill-defined culture expectations.

Improves the quality of our services to have trained staff. Increases our success in achieving strategic goals. Increases employee satisfaction and commitment to the organization; increases retention.

Promoting inclusiveness among staff. Educating staff of other resources. Opportunity for the dean to meet new staff members.

The library builds strong community. Enhances morale. Creates an engaged and effective workforce.

The library develops a cohort of new people who work together more effectively. The library develops a group of more engaged, better-informed and loyal professionals. The library retains their best people.

The participants get up to speed on administrative issues faster.
With staff having access to the broader picture, they can contribute more fully to the library’s mission, either by performing their specific job with a greater sense of purpose, or by contributing in other ways to the library, e.g., as a volunteer docent or serving on extracurricular committees.

**ADDITIONAL COMMENTS**

19. Please enter any additional information that may assist the authors’ understanding of your library’s activities to socialize new hires. N=17

Another area of related research that is needed is continuing socialization of all employees. For instance, we offer periodic “Open Houses” for our branch libraries and departments that help all employees get to know other areas of the library (and other employees) better. Also, we offer a quarterly “Mystery Meet” where employees volunteer to be assigned in random groups of four to go out to lunch together.

As an employer, we should remember how few chances we get to make a good first impression with a new employee. According to statistics, a person changes jobs roughly 10 times between the ages of 18 and 37. Effective integration of new employees, therefore, becomes essential for good human resource management. Providing new employees with adequate orientation and successfully integrating them into the organization, known as on-boarding, involves making sure employees have the tools and support they need to do their job—from the moment they are hired until they are up and running in their job.

In addition to the Libraries’ specific efforts, the university conducts a broader new hire orientation. This addresses the institution’s mission, history, and culture, as well as policies, benefits, and resources.

Most of our activities are informal, except as it relates to promotion, contract renewal, and tenure. We have nearly completed a newly designed orientation program for new staff that we hope to implement soon, and would like to develop a similar program for faculty.

On our campus, all new faculty can join the new faculty development program. In this formal program, for the first few years they have regular training seminars on how to essentially be successful in the rank and tenure process. New faculty choose a formal mentor. This mentor is paid a few hundred dollars as an incentive.

Our current socialization programs/activities have developed organically and we will begin approaching their design and delivery in a more formalized fashion.

The Archivist Development Program (ADP) is a developmental program that orients new archivists to NARA and provides opportunities for them to network with each other and meet senior leaders in the agency. As a group, participants attend two training classes each year of the two-year program which helps them understand NARA’s mission and vision, what NARA’s archivists do across the different program offices and the challenges they face. The initial training introduces them to the office heads and each other. Prior to the class, we hold a conference call where the participants informally meet each other and share their backgrounds. At the training, they receive nametags and a class roster. Throughout the week, we encourage them to switch their seats each day, so as to facilitate meeting more of their peers. The training also includes time for table and class discussions where they begin the sharing and exchange of knowledge and information. Participants also identify and complete observational assignments/job shadowing and a 30-day rotational assignment of their choice, either within the agency or outside to broaden their understanding of
archival challenges, issues, and practices. In collaboration with their supervisor, participants select a mentor within the first 60 days on the job. This person helps the participant learn the ropes of the office and agency by providing their guidance and perspective. Although participants receive an ADP guide once they join the program, a website has been created with information on the program. A wiki is also being used to encourage participants to network with each other between training classes and share their developmental experiences and knowledge. An ADP coordinator provides regular communication to the ADP participants and their supervisors, either via email or conference calls/webinars.

The department head or supervisor plays a very important role. Providing opportunities for people from different units to interact is very important to build a shared community interest, which translates to excellent library support for students and faculty. Develops appreciation of how others in the Libraries support faculty and students.

The libraries maintain a separate set of programs for student assistants. These activities include departmental orientation/training activities and system-wide programs and events designed to demonstrate appreciation and to enhance the students’ commitment to the organization.

The library does have an informal mentoring group that provides one-on-one matching of new librarians with more senior librarians. The mentoring group also sponsors informal discussion groups, to which new librarians and staff seeking library degrees are encouraged to attend. Topics for discussion may include portfolio reviews, career challenges for new professionals, networking and training opportunities outside of the workplace.

The New Employees Orientation Program (NEOP) was developed and implemented in 2009. Since July 2009, due to budget cuts and a 12-month, campus-wide hiring freeze, we have hired very few new staff. We have also undergone some leadership and organizational changes. Therefore, we will need to revise the content of NEOP before we resume the group sessions.

The New Librarian and Library Professionals Group was formed in 2008. Some have rotated off, others have joined. It is about socialization and enculturation. The associate dean solicits agenda items from the group, but also contributes to the agenda and includes topics such as “library politics,” how to work in teams, leadership, communication issues, and so forth.

The staffing dedicated to our library personnel services has been stretched very thin during the period covered by this survey. Due to hiring freezes since the fall of 2008, a support staff (admin assistant) position has been vacant and frozen for over two years, and an administrative coordinator position that became vacant some time ago remains vacant. We have never had a position dedicated solely to staff development, unfortunately. At present, that basically leaves me (the library’s personnel officer) to oversee and handle all the personnel actions including searches and hiring, performance reviews, librarian contract renewals, attendance and payroll matters, absence and FMLA matters, disciplinary matters, conflict resolution, arrivals and departures. Thus, regrettably, over time, there has been very little ability to develop the number and types of orientation and outreach activities for new hires that we would have wished.

The university specifically mandates mentoring programs for faculty to assist in their development. This is a university priority.

The Library’s HR director believes socialization is most successful when it is informal and not required.

We have developed several avenues for socializing new hires. Including training of supervisors, assigning mentors, better-organized on-boarding practices, and clearly articulated goals communicated to the new hire.

While it is unfortunate that the library does not have any formal socialization activities for other new hires, the university has a mandatory day-long orientation to help new hires get started at Kent State. Most supervisors take new hires under their wings the first several weeks and months to make certain the person is comfortable in the work place and feels a part of the unit.
RESPONDING INSTITUTIONS

University of Alberta
University of Arizona
Arizona State University
Boston University
Boston College
Brigham Young University
University of British Columbia
University of Calgary
University of California, Irvine
University of California, Los Angeles
University of California, Riverside
University of California, San Diego
Case Western Reserve University
University of Chicago
University of Colorado at Boulder
Columbia University
University of Delaware
Duke University
Georgetown University
University of Georgia
University of Guelph
University of Illinois at Urbana-Champaign
University of Iowa
Johns Hopkins University
Kent State University
University of Kentucky
Library of Congress
Louisiana State University
University of Louisville
McMaster University
University of Massachusetts, Amherst
Massachusetts Institute of Technology
University of Miami

University of Michigan
Michigan State University
National Archives and Records Administration
University of New Mexico
University of North Carolina at Chapel Hill
North Carolina State University
Northwestern University
University of Notre Dame
Ohio University
University of Oklahoma
Oklahoma State University
University of Oregon
University of Ottawa
University of Pennsylvania
Pennsylvania State University
Rice University
University of Rochester
Rutgers University
University of Saskatchewan
University of South Carolina
Southern Illinois University Carbondale
Syracuse University
Temple University
University of Texas at Austin
Texas A&M University
Texas Tech University
University of Virginia
Washington University in St. Louis
University of Waterloo
Wayne State University
University of Western Ontario
York University
Orientation Websites
UNIVERSITY OF CALGARY
LCR Staff Orientation
http://www.lcr.ucalgary.ca/lcrstaff/admin/hr/orientation

Libraries and Cultural Resources

Home
Welcome Message
LCR Vision
Mission Statement
Organization Chart
Publications & Reports +
Info for LCR Staff –

Home

Libraries and Cultural Resources Overview

Supervisor Information

New Staff Checklist
Week One checklist
Month One checklist
Information Technology Services (ITS) form for New or Moving Staff

Furniture
Request an ergonomic assessment
For other furniture requests, contact Blair Cherniawsky.

Staff Orientation

Campus Card
LCR Orientation Checklists
Week One checklist
Month One checklist

LCR Orientation Tours
Tour Feedback form
Tour Meeting Points

LCR Round Up Schedule (none currently scheduled)
Technical Services

- Information Technology Services (LCR)
- Information Technologies (UCIT) - (This link includes information on: IT computing, eID and UofC Portal, Access to Administrative Windows Resources, SecurID, Oracle Calendar Account, PeopleSoft Training an Application Training)
- Email Account
- Mailman Lists/Listservs
  - Current LCR Mailing Lists (Please email Shannon MacGillivray for access.)
- PeopleSoft Support Centre
- UC Portal

University Overview

- Campus Navigation
  - Directory of Buildings
  - Map
  - Online Staff Directory (Teleweb)
  - Virtual Tour
- Campus Recreation
- Campus Services
  - Bookstore
  - Campus Security
  - Child Care
  - The Den and The Black Lounge (Run by Students' Union.)
  - Food Court (This is located on the main and lower levels of the MacEwan Student Centre.)
  - Food Services
  - Grad Lounge (Run by Graduate Students’ Association.)
  - Microstore
  - Parking
  - Pharmacy (On the main level of the MacEwan Student Centre.)
  - SIS
  - President's Blog
  - U of C Home

Human Resources

- LCR Human Resources
- Central Human Resources
  - Mission
  - Statement on Principles of Conduct
- Support Staff
- Management and Professional Staff
  - MaPS website
- Academic Staff
- Career Opportunities
- Healthy U of C
- Learning and Development
- Payroll
The UCI Libraries' New Employee Orientation Program (NEOP) will introduce you to the organization and prepare you for success in your vital role at the Libraries, the intellectual crossroads of the UCI community. Thank you for joining our dynamic organization and supporting our efforts to develop and share knowledge on campus and beyond. We look forward to your future success!

The NEOP consists of two parts:
Part I: Checklists & Reference Guide
Part II: Presentation Modules

Please view a welcome message from Gerald J. Munoff, University Librarian.
NEOP Part 1

Part I includes checklists of procedural, job-specific and departmental information to prepare you for your daily work. The checklist orientation is conducted by your supervisor, colleagues, and administrative staff during your first month at the UCI Libraries.

Orientation Master Checklist

- Orientation AUL Div Checklist
- Orientation Business Office Checklist
- Orientation Facilities Checklist
- Orientation IT Checklist
- Orientation Kim Bishop Checklist
- Orientation LAUC I Checklist
- Orientation LHR Checklist
- Orientation Supervisor Checklist

The New Employee Orientation Reference Guide includes information about the orientation process, training, emergency preparedness, and benefits. The Guide also provides useful links and a glossary of terms and acronyms.
NEOP Part II

Part II includes a series of four modules intended to familiarize you with the work of the UCI Libraries as an organization. These modules explain the Libraries' vision, plans, and culture and review the work of our divisions and departments.

Module 1: Introduction to the UCI Libraries: Developing & Sharing Knowledge
Module 2: Library Administration, Administrative Services & Technical Services
Module 3: Collections & Public Services
Module 4: Team/Committees, E-Resources, Emergency Preparedness & the Libraries' Values
Orientation for New Libraries Employees

Congratulations on your new hire and welcome to the University Libraries!

You know the basics of your new position but there’s so much more to learn as you become a member of the Libraries Community. We’ve put together some procedures and resources to get you oriented to the Libraries, the University and the Boulder Community. To get started, please use the links to the left.

Welcome aboard!
New Employee Orientation

Orientation provides new employees with an overview of the University's and the Libraries' culture that assures an understanding of policies and procedures necessary to function efficiently in the environment. Orientation is addressed at various levels: Libraries, University and Department.

All newly hired faculty and staff must report to the Libraries' Human Resources Department at 8:00 a.m. on their first day of employment for Libraries' orientation (New Employee Orientation), which is designed to:

- Supplement the job-related orientation provided by the unit/department;
- Provide an overview of the Libraries' organization and it’s culture;
- Introduce you to key personnel/groups and the roles that they play in the organization; and
- Assure an understanding of policies and procedures necessary to function efficiently.

At that time they will also complete the online Form I-9, Employment Eligibility Verification, E-Verify, and review the information in the New Employee Orientation presentation and checklist. The checklist may be accessed online so that you may read further about the policies, benefits and services available to you as a University of Georgia employee.

All newly hired employees (faculty, staff, temporary, and student workers) should also complete the University of Georgia's online orientation on their first day of employment. All of the necessary employment forms and policy information, a benefits overview, and basic Right to Know information are contained in the orientation session. After completing the online orientation, please bring all of the completed forms to the Libraries' Human Resources Department, so that your employment paperwork can be finalized and submitted to the appropriate UGA department.

Should you need specific information about your individual benefits profile, you are encouraged to attend a Q & A session held the first and third Monday of each month from 9:00 - 10:30 a.m. by the University's Employee Benefits Department. These sessions are held in the Employee Training & Development Center located on Mitchell Street.

In addition, programs are being planned that reacquaint staff on a continuous basis with the workplace by providing practical information sessions on topics that directly impact work performance and related compensation.
Library Welcoming and Orientation

Getting a new employee off to a good start can make a big difference in how welcome they will feel and it will improve their ability to quickly become effective in their position. Do all that you can to make the “on boarding” process as smooth as possible for them by officially welcoming and orientating your new employee to your part of the organization.

Three Main areas of orientation:

Organizational Level Orientation

New employees need to understand the organizational vision, culture and the ongoing strategy for The Library. An overview must be provided by the leadership within the organization.

- Mike Ridley will meet with the employee within their first week if possible to provide the U of G vision, explain the role of the CIO and to speak about The Library in context with CCS and Organizational Services. 30 – 45 minutes.
- One Associate Chief, Helen, or Catherine will meet with the employee within their first week if possible, to provide insight into The Library’s overall relationship with the campus, the Library vision, culture, integrated plan and their role as Associate Chief Librarian. 30 – 45 minutes.

Directorate Level Organization (The Library and Organizational Services)

Additional meetings and plans will be scheduled specific to the new employee’s role so that they can quickly understand the various Library service areas and how their role and service area fit within the overall organization. It will also be important for new employees to learn about Organizational Services support.

- Within the first month, the new employee will meet with each of the Managers to understand their service areas – 30 minutes for each (up to ? meetings)
- Within the first month, the new employee will spend time in the front line service area(s) to better understand our client needs and how we provide them with support
  - Schedule a meeting with ? and then assign new employee to one of the Staff.
- Within the first month the new employee will meet with the AD of Organizational Services to get an overview of the support services offered
Functional Development (position within the Department)

- The New Employee should meet with their Manager within the first week to discuss their role and how they can get support – the discussion should include outline of key responsibilities as well as the regular responsibilities and expectations. An outline of progression to learn and integrate into role can be provided. Job shadowing and info about things they need to do specific to their role can be identified.
- Orientation program – one staff member will be assigned to the new employee, to begin on their first day, to provide extra support. This will include a more involved orientation for the first week. Lunch the first day, events around campus, a campus walking tour, answering any other questions that come up if they are able. A regular ‘check in’ role beyond that for the first month.

PreArrival CheckList

- Contact Organizational Services Support Staff to complete New Hire checklist.
  - Prepare work space/office assignment.
  - Contact Kirk Sprague: ksprague@uoguelph.ca
- Requests Keys/Codes
  - Contact Kirk Sprague: ksprague@uoguelph.ca
- Manager send announcement/email to listserv announcing the new hire and his/her background
  - Library Listserv: liball@listserv.uoguelph.ca
- Computer Systems Requirements
  - Organizational Services Personnel will contact IT Services Jeff Walker: jewalker@uoguelph.ca to inform IT of the staff start date and location
  - Hiring Manager will contact IT Services with computer and access requirements
- Hiring Manager to prepare the first day, first week and first month agenda for new hire (will need to be scheduled in Gryph Calendar)
  - Hiring Manager to review calendar to schedule appropriate meeting times during the new hires first weeks

First Day/First Week

- Organizational Services Support Staff to ensure that the new hire meets with H.R. to enrol in benefits
  - Karen Devries: kdevries@uoguelph.ca
- Organizational Services Support Staff to refer the new employee to the Online Orientation available at:
- Manager to discuss agenda for the first week
- Manager to officially introduce the new hire to the entire department – walk around with Manager or Orientation staff member on first AM or day if possible
- Manager to discuss purpose of unit, department, and the role of other employees
Manager to introduce the Orientation program, which is to begin on their first day and to provide extra support.
- To be provided by designated personnel
  - Conduct tour of floor, building, other appropriate facilities
  - Advise employee of phone extension and brief training or point to the online guide
  - Advise the new employee on where to park, and how to arrange for a University parking permit. (Parking Services, Trent Building, Trent Lane, ext 52118)
  - Show new employee where to find shared drives, printer, useful documentation and so forth
- Go to lunch
- Ensure the new hire gets ID card, keys ID Card Authorization Form
- Provide orientation of Fire and Emergency
  - Ext 52000 (Police, Fire, Accidents, Illness)
  - Fire alarm procedures
  - Emergency Exits and Building evacuation procedures
  - Location of fire extinguishers
  - Emergency First Aid Kit
- Provide information on Gryph Calendar

- Manager or designate to meet with the employee at the end of the first day to answer any questions
- Meeting with Mike within the first week
  - Mike Ridley: mridley@uoguelph.ca
- Meeting with Associate Chief Librarian within the first week

First Month and Three/Six Month
- Manager to arrange meeting with Organizational Services Associate Director
  - Kelly Bertrand: kbertran@uoguelph.ca
- Attend LC Library Council meeting (if appropriate)
- Introduce the employee to key University resource contacts associated with their work (if applicable)
- Review the Performance Review process for P & M staff
- Manager in consultation with the employee, identify job-related learning needs; develop and implement appropriate training plan
- Manager meet with the employee and their designated staff member to discuss progress with orientation and to plan further measures to address unmet needs
Welcome to York University Libraries!

The following links may be of interest to you as you adjust to life at York. If you have any questions about this information, please don't hesitate to ask any member of the Librarians' Group Executive (or any of your colleagues!). The current members of the Librarians' Group Executive are:

- William (Bill) Denton -- Chair, wdenton@yorku.ca, ext 2 0006
- Michael Moir -- Treasurer/Vice-Chair, mmoir@yorku.ca, ext 22457
- Andrea Kosavic -- Secretary, akosavic@yorku.ca, ext 20459

**YORK UNIVERSITY LIBRARIES**
- Current list of Librarians and Archivists
- York University Library Departments and Branches
- Library Hours
- York University Libraries Organizational Chart
- York University Libraries Meeting Calendars
- Librarian's Group: Composition and Rationale
- List of Subject Librarians
- Guidelines for Library Standing Committees
- Guidelines for Library Task Forces and Non-Standing Committees
- List of Policy and Procedures Documents
- Affirmative Action Plan for York University Libraries

**RESEARCH SUPPORT FOR LIBRARIANS AND ARCHIVISTS**
- Research Support website
- Research and Awards committee website
- Calendar of grant opportunities
- Conference Travel Funds -- to access the form to apply, click here
- Librarians' Research Grants (guidelines)
- Professional Expense Reimbursement
- A quick primer on scholarly communications

**ADMINISTRATIVE INFORMATION FOR LIBRARIANS AND ARCHIVISTS**
- Business Cards -- contact Gillane A. Beard, ULO, ext 22375
- List of various YUL forms, including leave requests, conference travel, etc.
- Vacation and Leaves of Absence
- Technical hints and tips (setting up your email, free software, where to go for help)
- Text from Collective Agreement on Workload of Professional Librarians
- York University Faculty Association (YUFA) Information
- York University Faculty Association Collective Agreement
- York University Faculty Association Constitution

**YORK UNIVERSITY**
- York Y-File (daily newsletter)
- Research Centers and Institutes
- York University’s Resource Centres
- York Telephone and Email Directory
- York University Senate Policies, Procedures, and Regulations

**YORK UNIVERSITY SERVICES**
- Campus Maps

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Welcome to York University Libraries!

- Parking Information
- Division of Continuing Education
- Recreation York
- Cooperative Childcare Centre
- Ombudsperson and Centre for Human Rights
- Centre for Human Rights
- University Policy on Sexual Harassment
- Office for Persons With Disabilities
- Positive Space Program (for sexual and gender diversity)
- Counseling and Development Services

TENURE AND PROMOTION RESOURCES (for continuing stream appointments only)
- Introduction to the Promotion and Tenure Process – distributed by PCAC
- Criteria for Promotion and Continuing Appointment (view the current YUFA contract)

SPECIAL PERKS
- YorkU Faculty and Staff Discounted Metropasses
- Edvantage (we're members of YUFA, which is a member of OCUFA, which entitles us to join Edvantage - great deals!)
  - Bell/Bakka Wireless cell phone service
  - Goodlife fitness membership
  - Apple for educators discounts
- Data Integrity (campus computer store)
  - Show your YU Card to get faculty discounts on software and hardware
- We also get a discount on the Chapters iRewards card ($5 off) because we're considered faculty
  - Purchase your iRewards card in store and show your YU card to get the discount

Librarians Group Executive
Updated: January 2011

Last modified by: Andrea Kosavic on Mon Mar 07 11:46:53 EST 2011
Orientation Programs
New Employee Orientation Team (NEO) Charge

Purpose:
To improve the orientation process so that new employees to the Library feel more confident, prepared and able to be successful in their positions and fully participating members of their teams.

Problem:
- Having a new employee orientation process is critical to retention and success of the employee. As the Financial and Administrative Support Team (FAST) assessed its processes at the retreat this was identified as a priority for improvement. This process relates to “recruiting and hiring” and “training and development,” but is not assessed per se in the FAST survey. Experience this past year pointed out the need to collaborate with Team/Work Team Leaders and develop a better process library-wide. The process has never been studied as a whole and assessed for consistency, comprehensiveness, and success. Roles and responsibilities have not been clarified since the 2000 vacancy in the Staff and Organization Systems Team. The design of the “Performance Effectiveness Management System” (PEMS) process called for some responsibilities and monitoring of team new staff/faculty orientation that have not been assessed. Forty or 23% of our current staff could be described as “new” (hired since July 1999).
- The FAST “customer” survey does not assess this process directly.
- Team/Work Team Leaders, and various SOS staff “coordinate” part of this process, but have not done so with clear delineation of responsibility and communication has not been regular and thorough. The Library Information Systems Team (LIST) and FASTCATS also play a role in NEO. Teams are not aware of what each other do. There have been 6 new team leaders since 1998.
- In the most recent restructuring there are new work teams and new teams and new staff will need to understand their teams relationships to these teams.
- There is no documented NEO process recognizing responsibilities.
- Timing of parts of the NEO process may be problematic i.e. the employees ability to absorb.

Context/Opportunity:
- The Library continues to change and this new information needs to be integrated into present process and continually updated.
- Campus changes need to be incorporated into our NEO processes -- and the library’s relationship to the University needs to be incorporated.
- The Learning Networks and partnerships with our customers present an opportunity to cooperate in improving this process.
Parameters:
- Include candidates that search teams are interviewing, finalists and new hires before they actually arrive.
- Include all permanent and extended temporary full and part-time staff, and permanent and year-to-year appointed personnel (including Sabio residents) through their first full year.
- Exclude students, temporary staff and librarians (although teams can decide how to include these employees when appropriate).

Products/Outcomes:
1. A process map/flow chart of all NEO processes, with assigned responsibilities.
2. Written guidelines for NEO at the Library/Team/Work team levels that resides on the SOS website and each team’s internal website.
3. Orientation materials for new employees.
5. Training for TL/WTL’s and SOS/FAST and others involved.
6. The performance measures for this project team will be:
   a) satisfaction measured by a survey of new employees after their first year
      QS: 80% satisfaction on a scale of 1-4
   b) satisfaction measured by the FAST survey (needs to be added as a process and baseline data gathered)
   c) satisfaction measured by input from Team/Work Team Leaders
      QS: 80% satisfaction

Resources:
- Current NEO guidelines on SOS website.
- Checklists for NEO (SOS)
- Binders for NEO (SOS)
- $500 (FAST marketing may be available)
- Michael, Martina, Ketty
- All Library staff
- U of A HR website/office
- Present orientation materials (UA, Library)
- Chamber of Commerce; other local companies
- Literature on NEO
- The Diversity Council

Suggested Approach (Steps):
1. Assessment with new staff (up to 1 yr.) and Team/Work Team Leaders.
2. Map the current process
3. Gather other data related to NEO (#s of new staff since July 1999)
4. Analyze all information
5. Identify/pareto major problems
6. Benchmark other institutions
7. Brainstorm solutions to top problems and gain agreement to pilot
8. Pilot improvements
9. Assess which have been successful and gain agreement on implementation
10. Train appropriate people in new processes/guidelines
11. Integrate into new SOS/Team NEO processes
12. Annual assessment as part of FAST survey and to new staff (quick survey)

Reporting Relationships:
- We are a FAST project team.
- We will need SOS', FASTCATS' support
- FAST is the Management Review Team (MRT)
- We want to partner with the TL/WTL, Learning Networks, LIST
- We will report out as part of FAST Team Reports.

Roles:
Teams:
- SOS is a source of "current situation"
- TL/WTL are a source of "current situation"
- We will recommend to FAST/TL/WTL's changes in the process and jointly decide with them.

Individual:
- To be determined

Timeframe:
- May 2002 - Final report and FAST survey
- 2002 and beyond - survey done by SOS after 1 year completed
- Steps 1-4 - Nov. 1
- Steps 5-7 - Jan. 15
- Step 8 - April 15
- Steps 9-11 - May 15

Skills and Knowledge:
- Orientation and education of staff
- Process improvement
- Focus group and survey skills
- PowerPoint
- Guideline writing
- Old and new perspectives
- Knowledge of current processes, guidelines
- Different work teams in FAST
- New staff or Work Team Leader with non-FAST perspective
LIBRARY OF CONGRESS
Orientation to Library Services for New Staff

ORIENTATION TO LIBRARY SERVICES FOR NEW STAFF

Prepared by
Tim Carlton

Cooperative and Instructional Programs Division
Library of Congress

Rev. October 2010
Orientation to Library Services for New Staff

Course Summary

This 3-hour course is designed to provide a comprehensive orientation to Library Services. It is intended as a follow-up to the general orientation to the Library, provided by Human Resources in the first days of an employee’s service at the Library, and is the culminating element in the Library Services “New Employee Orientation Program.”

The course has three purposes: summarize the essential “need to know” information (e.g., policies and logistics) which the staff member should already have learned; provide “good to know” information about the Library and Library Services missions, activities, and procedures; and go “Beyond the Walls” to enhance the employee’s “Library life” through a selection of documents, web links, discussions, and “Tips from an Expert.”

The course can serve as a means of regularly reviewing the growth of the employee’s career, both by the employee and in consultation with the supervisor. For that purpose, “Action Items” are interspersed throughout the units, and a checklist of these appears in Unit 5.

Learning Objectives

At the end of this course, participants will be able to:

- Access, review, and process all HR-related resources (such as WebTA, NFC, etc.)
- Comply with Library policies for absenteeism, tardiness, leave, and behavior
- Comply with the Library policies for Computer Security
- Utilize Audix and email
- Access LC Regulations and the Collective Bargaining Agreements
- Know what to do in cases of emergency
- Describe the mission and basic history of the Library of Congress
- Describe the structure of Library Services and its Directorates
- Describe in some detail the mission of their Division, its importance within Library Services, and its key partners in other Divisions and Directorates
- Search the collections, request items, and monitor their borrowing account
- Practice effective procedures for Collection Security
- Work with their supervisor to develop and manage a comprehensive training plan
- Locate interesting “extracurricular activities”
- Learn about employee organizations
- Know about the world “Beyond the Walls” of the Library
- Be able to share a few interesting “I bet you didn’t know” anecdotes

Training Methods: Lecture, discussion, and guided exploration of LC and LS web pages
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Orientation to Library Services for New Staff

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# Unit 5: Checklist of Action Items

Use this checklist as a record of your personal progress.

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<td></td>
</tr>
<tr>
<td>1-2</td>
<td>Review LCR 2015 to make sure you understand the various types of leave.</td>
<td></td>
</tr>
<tr>
<td>1-3</td>
<td>Make sure you know your WebTA responsibilities, and those of your WebTA clerk and approving official.</td>
<td></td>
</tr>
<tr>
<td>1-4</td>
<td>Review any Standards of Conduct that might be relevant to you.</td>
<td></td>
</tr>
<tr>
<td>1-5</td>
<td>Complete the mandatory IT Security Awareness course.</td>
<td></td>
</tr>
<tr>
<td>1-6</td>
<td>Complete the mandatory Ethics Briefing.</td>
<td></td>
</tr>
<tr>
<td>1-7</td>
<td>Search the Staff Directory for yourself, your work unit, and 1 classmate.</td>
<td></td>
</tr>
<tr>
<td>1-8</td>
<td>Review the CBA that applies to you, and ask your supervisor if anything is unclear.</td>
<td></td>
</tr>
<tr>
<td>1-9</td>
<td>Read the Employee Emergency Action Guide and your Internal EAP, and learn your assembly and SIP locations from your colleagues.</td>
<td></td>
</tr>
<tr>
<td>2-1</td>
<td>Read the web-documents: “Jefferson’s Legacy” and “On These Walls”.</td>
<td></td>
</tr>
<tr>
<td>2-2</td>
<td>Take the Tour – and consider becoming a future docent.</td>
<td></td>
</tr>
<tr>
<td>2-3</td>
<td>Learn to effectively navigate the LS web page.</td>
<td></td>
</tr>
<tr>
<td>2-4</td>
<td>Learn all you can about your own Directorate, and then about the others.</td>
<td></td>
</tr>
<tr>
<td>2-5</td>
<td>Consider conducting an interview for the Veterans History Project.</td>
<td></td>
</tr>
<tr>
<td>2-6</td>
<td>Access your “My EPP” account, review your latest earnings and leave statement, and click on “Self Service” to consider making changes (change withholding? allocate some of your pay to savings accounts? buy bonds?)</td>
<td></td>
</tr>
<tr>
<td>2-7</td>
<td>With your supervisor’s approval, complete the classroom course, Federal Benefits &amp; Financial Planning for New Employees.</td>
<td></td>
</tr>
<tr>
<td>2-8</td>
<td>Review the Ergonomic Tips and arrange to make any needed adjustments to your workstation.</td>
<td></td>
</tr>
<tr>
<td>2-9</td>
<td>Complete the searching course most appropriate for your duties.</td>
<td></td>
</tr>
<tr>
<td>2-10</td>
<td>Set up a borrower’s account and request an item from the collection</td>
<td></td>
</tr>
<tr>
<td>3-1</td>
<td>Create a personal Development Plan in the Online Learning Center</td>
<td></td>
</tr>
<tr>
<td>3-2</td>
<td>Consider applying for the Leadership Development Program or Career Development Program</td>
<td></td>
</tr>
<tr>
<td>3-3</td>
<td>Watch at least one webcast from each of these groups: “Webcasts”, “Journeys and Crossings”, “LCs Digital Future and You!”</td>
<td></td>
</tr>
<tr>
<td>3-4</td>
<td>Become active in LCPA or another employee organization</td>
<td></td>
</tr>
<tr>
<td>3-5</td>
<td>Develop the routine of studying the web sites of divisions cited in “Friday’s News”</td>
<td></td>
</tr>
<tr>
<td>3-6</td>
<td>Explore myLOC.gov</td>
<td></td>
</tr>
<tr>
<td>3-7</td>
<td>Attend the Briefing for staff attending ALA Annual or Midwinter.</td>
<td></td>
</tr>
</tbody>
</table>
New Employee Resources

Message from the Archivist of the United States

Start the Orientation and Welcome Video

Welcome to NARA! You have joined a great agency!
You can start learning about your new agency in this 10-minute introductory video.

Introduction to NARA

How does your work help NARA accomplish its mission? What does everyone else do at NARA? This three-hour interactive course presents a comprehensive overview of our agency. You can start and stop the course at any time.

Start the Introduction to NARA Course

After viewing the course here, you will need to login to NARA@training (you will receive an ID and password to access the site 2-3 weeks after your start date), access the course link from the homepage, and review the course again in order to receive a certificate of completion. You may also wait until you have access to NARA@training to complete the course.


The U.S. National Archives and Records Administration
8601 Adelphi Road, College Park, MD 20740-6001 • Telephone: 1-86-NARA-NARA or 1-866-272-8272
Module 5: Course Summary

D-link:
Page indicating completion of the Introduction to NARA course. Page has 4 buttons and a note saying "The Main Menu displays this icon (Archives building with a tick mark) to indicate which modules have been completed. Make sure you have completed each module to receive the credit. Once you have a check mark for each module, find the Completion Certificate on your Learning Progress page in the LMS." The four buttons are labeled Module 1-History of NARA, Module 2-Facilities and Organization, Module 3-Managing our Government's Information, and Module 4-Our Customers Matter. These buttons can be selected to see the key summary points of the corresponding module. The thanks icon on the page can be selected to open up the course credits page.
Introduction to National Archives and Records Administration

Module 5

Course Summary

Congratulations! You have completed the Introduction to NARA course. It’s time to review some key points from this course.

Module One--History of NARA covered the following key points:

• NARA was formed because records were widely dispersed and in jeopardy, and various organizations requested a single agency be charged with maintaining the Government’s historical records.
• NARA is an independent agency of the executive branch of the federal government. In our facilities around the country, customers are able to discover, use, and learn from this history.
• NARA is an important part of the Federal Government and continues to grow and embrace its mission of safeguarding and preserving the records of our Government.
• We will continue to ensure that American citizens have access to records that document the actions of their Government and promote the historical understanding of our national experience.
• The mission of NARA is rooted in various laws that provide NARA with its authority.

Module Two--Facilities and Organization covered the following key points:

• All employees and program offices throughout the country are connected and are vital parts of NARA.
• NARA has eight staff offices and six program offices. Each of these offices has specific functions.

Module Three--Managing our Government’s Information, covered the following key points:

• The records life cycle includes the following steps: Records Creation, Records Maintenance, Records Disposition, Archival Preservation, and Access.
• At NARA, our work touches all stages of the records life cycle. The Federal Register, Information Security Oversight Office, Presidential Libraries, Office of Records Services, Washington, DC, and Office of Regional Records Services all play a key role.
• The offices of Records Services, Washington, DC, and Regional Records Services collaborate in implementing a National Records Management Program intended to assist agencies.
• An important outcome of successful Federal records management is the identification of records appropriate for transfer to the custody of the Archivist for long term preservation and access.
• NARA’s holdings provide information about people, places, and events.
**Introduction to National Archives and Records Administration**

Module 5

- NARA holdings are created and stored in various formats such as paper, electronic, microfilm, microfiche, special media, and artifacts.
- NARA manages internal records by creating and receiving records as required by the job, keeping records correctly to document work activities, as determined by your unit, and keeping records for the required length of time in accordance with the NARA Records Schedule.

Module Four--Our Customers Matter covered the following key points:

- NARA's customers include those who are creators of records and those who are users of records.
- NARA makes holdings available through a series of steps: initial processing, holdings maintenance, preservation, arrangement, description, and access/reference.
- Customers may gain access to our records through: published guides and other finding aids, online databases, and consultation with reference staff (e.g., ARC)
- Reference services are available throughout all NARA locations. These services include onsite reference services, digitization of holdings, AAD resources, Presidential Libraries, FOIA, declassification, access through FRCs, public programs and exhibits, educational outreach programs, and special events.
- The ERA program is a strategic initiative by NARA to preserve and provide long-term access to the electronic records of the U.S. Government. The ERA is moving certain NARA business processes from primarily a paper-based process to an online process.

**Audio Transcript:**

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Introduction to National Archives and Records Administration

Module 5

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University Libraries
Orientation Process for New Faculty

A Message from the Dean
Welcome to the University Libraries (UL) faculty. The Libraries are a great place to work and we will all be doing our best to make your library experience top notch. It is an exciting time to be a library employee as we adjust to the information needs of UNM students, faculty, and staff in this electronic age.

Mission of the University Libraries
The University of New Mexico Libraries is a dynamic leader in connecting customers to information, collections, and instruction - anyplace, anytime, as well as providing and maintaining exceptional facilities for the evolving education, research and service needs of UNM and the wider community.

Completing the Orientation Process
Your supervisor (or their designee) is responsible for guiding you through the Libraries’ orientation process and will answer any questions you have as you complete each step. The orientation is divided into three parts, each with its own form to complete, sign, and turn in. Part Four is a feedback form which is optional. You may turn in each form as it is completed. Some steps in the orientation will require scheduling time away from your new job. Your supervisor will work with you to coordinate this time with the other needs of your department. Some steps may not be necessary if you have transferred to the Libraries from another UNM department.

Important Discussion Points
Confidentiality: Details of the library information resources used by UNM students, staff, faculty, and other customers are confidential and should never be released. UL employee personnel and personal information should also never be released. Your supervisor will elaborate on this topic and provide specifics related to your position.

Security: All employees are expected to keep abreast of new policies and procedures as they arise. Your supervisor will provide more specific security information related to your position and your department.

Chain of Command: Your supervisor will provide you with the chain of command details for your department.

Faculty Sponsor Program: The UL supports new faculty in many ways including the faculty sponsor program. The UL Promotion & Tenure Committee and the Deputy Dean will assist you with selecting a tenured faculty member to act as your mentor as you move through the tenure-track process. Set up a meeting with the Chair of the P&T Committee and with the Deputy Dean early on so that you know what to expect of this important support program and how to select a mentor.

Sharing Knowledge and Ideas: Employees are encouraged to generate and share creative/imaginative ideas that may enhance workflow and/or the work environment. Please explore the many avenues provided for this exchange of ideas such as unit meetings, serving on committees, speaking with your supervisor, or with other management personnel.
New Faculty Orientation (Part One)  Employee Name:

SUPERVISOR (or designee): Discuss each item with the employee. Coordinate any time needed to complete the checklist within the first few weeks of work. Assist the employee with finding specific UNM offices and with making any appointments with Library staff or faculty that may be needed. Answer questions as needed. Turn in when complete and signed.

EMPLOYEE: Check off each item on the list as it is completed. Schedule your time to complete this list in the first few weeks of work. When complete, sign and give to your supervisor.

The Basics

☐ FIRST: Meet with UL Employee Resources Manager to determine if any hiring paperwork is needed
☐ LOBO Card: go to LOBO Card Office located in the SUB.
☐ UL Badge: (requires a LOBO Card and UL form) Obtain the form from Administration and take card and form to LOBO Card Office.
☐ Parking on Campus: visit Parking Services to request parking pass, review parking maps, rules, and restrictions (if interested, discuss bicycle parking availability in Zimmerman with Facilities Services staff)
☐ Departmental Functions and Responsibilities
☐ Work Schedule, Hours, Breaks and Work Space
☐ Payroll & Faculty Leave Requests: meet with UL Payroll office to review leave forms, information, and receive training (if employee is a manager or supervisor, payroll training is also required)
☐ Groupwise Email, Chat, and Calendar Account: request an account at http://its.unm.edu/groupwise/accountrequest.html
☐ Campus Mail: UNM and UL policy/procedures
☐ Telephone Use: UNM system, department procedures and rules
☐ Voice Mail Training: schedule training, if applicable
☐ Sick Leave, Annual Leave, Professional Leave: policy and procedures
☐ Lateness: policy and procedures
☐ Introductions to Other Department Employees
☐ Facilities: department and employee areas
☐ Emergency Contacts: review department procedures
☐ Emergency Evacuation: visit primary/secondary routes; review procedures and roles
☐ Safety:
  ☐ Review policies and procedures
  ☐ Role of UL Security Personnel
  ☐ Right to Refuse Service policy http://elibrary.unm.edu.libproxy.unm.edu:8080/services/facilitiespolicy.php
  ☐ Schedule employee for required safety training
  ☐ Hazard communication training (required if employee has chemical exposure beyond normal household use)
☐ Security: review policies and procedures
  ☐ building entry/exit
  ☐ offices, rooms, files, desk, equipment, and personal belongings

Part 1 Review completed: _______________________________ _______________________________

Employee Signature Date Completed

SEND SIGNED FORM TO: Rita Critchfield, Zimmerman 201
New Faculty Orientation (Part Two)  Employee Name: ____________________________

SUPERVISOR (or designee): Discuss each item with the employee. Coordinate any time needed to complete the checklist within the first few months of work. Assist the employee with making any appointments with Library staff or faculty that may be needed. Answer questions as needed. Turn in when complete and signed.

EMPLOYEE: Check off each item on the list as it is completed. Schedule your time to complete this list in the first few months of work. When complete, sign and give to your supervisor.

Who, Where, & How

☐ Using University Resources: department and UNM policy/procedures for use of offices, computers, computer accounts, campus mail, department equipment, etc.
☐ General Building Tour in assigned area
☐ Chain of Command
☐ Channels of Communication
☐ UL Organization Charts
☐ Confidentiality: review policies
☐ Performance Review (employee and direct supervisor only)
  □ review job description (see letter of offer for details)
  □ review Faculty Performance Review policy
  http://libintra.unm.edu.libproxy.unm.edu:8080/Main/Policies/
  □ review Professional Enrichment Award Program including available funds,
  UNM tuition remission, etc.
☐ Faculty Sponsor Program (employee meets with Promotion & Tenure Committee and Deputy Dean)
☐ Promotion and Tenure (employee meets with UL Promotion & Tenure Committee and Deputy Dean)
☐ Office Supplies
☐ Food and Drink (if applicable)
☐ New Managers and Supervisors Only -- UNM Manager Orientation Workshop
  (contact UNM’s HR Department to schedule this workshop)
☐ Disaster Preparedness and Recovery
☐ Branch Libraries on Campus: schedule meetings & tours, as appropriate:
  □ CSEL  □ FADL  □ PML  □ ZIM

☐ Meetings with UL people:
  Arrange a meeting time with each person or department listed below
  □ Dean
  □ Deputy Dean
  □ Assoc Dean of CSWR & Special Collections
  □ Assoc Dean: Facilities and Access Services
  □ Director of Instruction
  □ Director of Library Information Technology
  □ Employee Resources Manager
  □ Facility Services Manager
  □ Director of Cataloging and Discovery Services
  □ Director of Collections and Acquisitions Services
  □ Director of Access Services
  □ Director of Outreach
  □ Curator: InterAmerican Studies
  □ Curator of INLP
  □ Budget & Cost Management Manager

Part 2 Review completed: ____________________________  Employee Signature  Date Completed

SEND SIGNED FORM TO: Rita Critchfield, Zimmerman 201
New Faculty Orientation (Part Three)  

Employee Name: ____________________________

SUPERVISOR: Coordinate any time needed by this employee to complete this electronic resources review within the first few months of their new assignment. Answer questions, as needed. Turn in when complete and signed.

EMPLOYEE: Check off each website or policy as you complete your review. When complete, sign and give to your supervisor.

Websites & Policies

GENERAL UNM INFORMATION

☐ Section 3000, Personnel Policies (for new employees and for managers/supervisors) – this page contains important, relevant policies that will help guide you as an new employee or as a supervisor of other employees such as Performance Review, Leave and Paid Holidays, Work Schedules, Compensation, Benefits, and many other general policies.

HUMAN RESOURCES DEPARTMENT INFORMATION
☐ UNM HR: Conduct a general review of this important and helpful website: http://hr.unm.edu/ You will find in-depth information on benefits and insurance, retirement, employee training, UNM’s employee health programs, employment, and access to your electronic pay statements.

FACULTY HANDBOOK
☐ Faculty Handbook: the home page for this document is located at http://handbook.unm.edu/. It contains information related to your status as a UNM faculty member including the tenure-track process, promotions, faculty leave policies, performance review, and much more.

UNIVERSITY LIBRARIES INFORMATION
☐ Home Page: http://elibrary.unm.edu/
☐ UL Intranet: https://libproxy.unm.edu:4443/login?url=http://libintra.unm.edu/
☐ UL History at a Glance: http://elibrary.unm.edu/deansoffice/ULhistory.pdf
☐ Fast Facts: http://elibrary.unm.edu/deansoffice/factbook/ULFactSheet06.pdf
☐ Strategic Plan: http://elibrary.unm.edu/deansoffice/StrategicPlan2006-09.pdf
☐ Library Branches: http://elibrary.unm.edu/locations.php
☐ Library Committees: http://library.unm.edu.libproxy.unm.edu:8080/Main/Committees/
☐ Library Organizations & Affiliations: http://elibrary.unm.edu/libproxy.unm.edu:8080/Main/Affiliations/
☐ Library Policies: http://elibrary.unm.edu.libproxy.unm.edu:8080/Main/Policies/
☐ Library Forms: http://elibrary.unm.edu.libproxy.unm.edu:8080/Main/Forms/
☐ Library Employee Phone List: http://elibrary.unm.edu/employment/lists/employee-phone-list.pdf
☐ Library Department Phone List (under Directories): http://elibrary.unm.edu/employee.php

Part 3 Review completed: ____________________________  ____________________________

Employee Signature     Date Completed

SEND SIGNED FORM TO: Rita Critchfield, Zimmerman 201
NCSU LIBRARIES NEW STAFF ORIENTATION TOUR SCRIPT [updated 9/22/09]

Introduction

As part of orientation you will participate in three tours of D.H. Hill Library today. We will be doing a lot of walking, so if you have any limitation such as not being able to use the stairs, please let me know. Throughout the year, you can also participate in advertised tours of other important parts of the Libraries, such as the branches, offered by the Staff Learning and Development Committee. The tours today will provide a broad introduction to various departments and the services provided to our users. You can find out more about each department by exploring the departments websites available on the NCSU Libraries public website.

* = unit where we would like to have a representative introduce themselves and department in 2-3 minutes (provide a face)

10:45 – 11:05  First Tour – Preservation / Ground Floor

Ground Floor

Receiving and Distribution Unit
The mailroom processes all incoming and outgoing mail and shipments, including books. It is managed by the Facilities department, which also oversees building maintenance, housekeeping, and ongoing construction projects.

Metadata and Cataloging
The Metadata & Cataloging Department provides effective, accurate tools that assist Libraries’ clients in locating information resources of value to them, either locally or remotely through the Internet. They catalog all materials, including electronic journals and texts, for all libraries in the NCSU system.

Acquisitions
The Acquisitions Department is committed to acquiring resources in all formats for the NCSU Libraries’ collections. They collaborate with Collection Management to spend just over $9 million. The department has 19 staff divided into two units: the Monographs Unit and the Serials Unit. Last fiscal year, we bought over 25,000 books (in various formats), processed more than 47,000 serials, and more than 500 electronic journals.

Preservation – Presentation (~10-15min.)
The Preservation department works to maintain and preserve collections and the information they contain in viable and accessible formats. It consists of two units: Conservation and Shelf Preparation.

Special Collections Research Center Offices
The Special Collections Research Center identifies and collects rare and unique materials to support the research and teaching needs of the university. The collection contains over 13,000 linear feet of material as well as some 250,000 photographic images documenting the history of NCSU, the history of science, entomology, architecture and design, engineering, and a host of other subjects. These resources are housed in one of three collecting units: Manuscripts, Rare Books, and the University Archives. The Special Collections Research Center also provides access to its collections through digitization and exhibition programs. The digitization program makes digital versions of photographic and manuscript materials available online. With the completion of the East Wing
renovations, the exhibition program expanded by adding a special exhibit
gallery for original material that would be otherwise too sensitive to display.

* NC LIVE
North Carolina Libraries for Virtual Education (NC LIVE) offers the citizens of
North Carolina online access to various electronic resources. NC LIVE is
available free of charge for library patrons, researchers, and educators from four
communities of interest – public libraries, community colleges, the state's
university system, and members of the North Carolina Association of
Independent Colleges and Universities.
Contact Scott Ross in NC Live to let them know we're coming so they can
be prepared.

invite new staff to take a 5 minute break in the bathroom / seating area of the
learning commons / exhibit gallery

11:10 – 11:55  Second Tour – East Wing

First Floor
Special Collections Research Center – Presentation (~10-15 min.)

Friends of the Library
Friends of the Library organizes an annual book sale and organizes various
programs in support of NCSU Libraries. Membership is open to all.

Second Floor

*Digital Media Lab (SKIP??)
The Digital Media Lab provides assistance for the NC State community in
creating and converting all types of media to digital formats. In addition to a
diverse mix of scanners allowing conversion of documents, slides, photographs,
and microforms to digital format, the Digital Media Lab provides the means for
converting analog video to digital video, as well as creating digital video clips.

Information Technology
IT ensures the smooth operation of information technology services to a diverse
constituency of both Libraries staff and the NCSU community. IT staff are
responsible for managing existing production services as well as designing and
implementing new services, often in collaboration with DLI staff. Services
include: Desktop support for Libraries staff (Help Desk), programming and
development, technology training for Libraries staff, and management of
networked resources.

Scholarly Communication Center
The Scholarly Communication Center is a campus resource on issues related to
scholarly publishing, intellectual property, and copyright.

Information Technologies Teaching Center Labs (ITTC Labs)
The two ITTC teaching laboratories are used to train faculty and students in
pedagogical technologies. They can be reserved online, and the keys are
available in Reference and Information Services. DELTA, which has a unit
housed in DH Hill (sharing space with DLI), also uses the labs to provide
instruction to the campus faculty.
Assembly Room
The Assembly Room is used for mid-sized library meetings and programs.

Interlibrary Loan and Document Delivery Services (ILL/DDS)
Interlibrary Loan and Document Delivery Services provides access to materials needed by NCSU students, faculty, and staff but not available in the NCSU Libraries. ILL/DDS also delivers library materials to distance learners and Extension faculty and staff.

Learning Technology Service
LTS offer instruction and support primarily to faculty, helping integrate technology into instruction and training. LTS is part of DELTA, which manages the university's learning technology infrastructure, including the Wolfware and WebCT course management systems, and the campus video classrooms.

Third Floor
*Personnel
The Personnel Services Department coordinates recruiting and hiring of librarians, library staff, and student assistants. They provide staff development and training programs, and offer employee relations services. They are your first contact for any questions or concerns regarding employment in the NCSU Libraries. Contact Laura Blessing (Director, Personnel).

Finance and Business
The Finance and Business Office leads the budget development and reconciliation processes for all the Libraries funds sources: state appropriated, service fee generated, privately donated, and extramurally funded. F&B performs the purchasing function for library staff, including the collections purchases, and also assists the funds receipts processes in Circulation, ILL, RIS, and FOL. Travel and non-travel employee reimbursements are also handled here. Finally, the department also performs contract management, maintains insurance coverage, and does the wage reporting.

Administration
The NCSU Libraries Administration helps plan, organize, direct, and promote activities across the Libraries, including recruitment and personnel development, planning and research, facilities, and public relations. The offices house the Director and Vice Provost of Libraries, Deputy Director and four Assistant and Associate Directors as well as support and professional staff. Tuition waiver forms must be brought to the office for approval from the Director. Their staff is available to answer or direct questions to the appropriate person.

Break!
1:00 – 1:55
Third Tour – West Wing / Learning Commons

First Floor
*Digital Library Initiatives
Referred to as DLI, this department works to create new digital services and collections utilizing leading-edge library and Internet resources. DLI staff often
test and refine initiatives before working with the IT department to implement the full-blown rollout of a digital “product”. For any given web, database, or software technology in use for patrons or staff, it’s very likely that both DLI and IT have contributed greatly to the effort. Contact Tito Sierra (Associate Head) or Angie Ballard.

Research and Information Services Offices
RIS provides research and research assistance to all university students, faculty, and staff — at the Reference Desk, over the telephone and via chat, and in the classroom.

Learning Commons / Service Desk – Presentation (~15 min.)

*Circulation / Reserves and Bookstacks
Circulation staff provides information on how users can borrow library materials from the NCSU Libraries as well as from other libraries. They can explain loan, recall, and fine policies, provide borrowing privileges to students, faculty and staff from NCSU and from institutions with which NCSU has reciprocal borrowing privileges, and search for books that cannot be found in the bookstacks. Behind the desk are materials placed on reserve by N.C. State faculty as assigned or supplemental readings for their courses. Most items can only be checked out for short-term use by currently registered NCSU students and faculty members.

Media and Microforms Services
The Media and Microforms Services provides in-library use of material in several formats: videocassette, CD, DVD, laser disc, slide, and audiocassette. The center also contains collections in microfiche, microfilm, and microprint formats. Newspapers, technical reports, standards, statistics, NCSU dissertations and patents are included.

WolfCopy
WolfCopy provides support for and answer questions about using the public photocopiers and network printers

Second Floor

*Collection Management
The Collection Management Department develops the Libraries’ collections, allocates the collection budget, formulates collection development policies, assesses users’ needs, and performs faculty liaison activities. Please contact Katie Wheeler (was Garling) – she will make sure someone is available.

First Floor

Assistive Technologies Center (ATC) – Presentation (~5 min.)
Facilitates library research and alternate format access to library materials

Basement

Staff Lounge
Welcome to York Libraries,
new hire!

This package contains information to assist you in getting started at York Libraries.
I. Personal Information at Work

Employee ID –
Direct Line (voicemail) – x temporary password:

Computer Workstation Userid –
Password –  (to be changed immediately upon login)

Email Userid –
Email Password –  (to be changed immediately upon login)

Passport York Account – This account is required for online services on and off campus at York. Send an email to: accounts@yorku.ca and request a Passport York account. The request must include your full name and your employee number.

FAS Account – This account is required to access public workstations on campus. If you would like one of these accounts, go to Manage My Services: http://mms.yorku.ca, sign in with your passport York password, and click on FAS – File Access Service on the left side of the page.

When you use your FAS account to log into a campus computer, you get access to the software applications specific to that location. For example, a computer in the library offers different resources from a computer in the Computing Commons.

Library Card – At York, we have a multi-purpose YU Card, which serves as your overall York ID. Visit the YU-card Office to have your photo taken. You will need your York employee ID number and one piece of valid, government-issued photo identification. Your photo will be taken and you will receive your YU-card on the spot. To learn more: http://www.yorku.ca/yucard/facultystaff.html
II. Map Library (home branch)

Hours
Monday - Thursday  10:00 am - 9:00 pm
Friday    10:00 am - 5:00 pm
Saturday & Sunday  12:00 pm - 5:00 pm

File Management
Home Personal Drive –
Map Library staff shared Drive –
Public Drive
H:/PUBLIC/

Phone
Dept Phone (voicemail) – x33353
Department Fax - 416-736-5838
Long distance fax usage – retain activity reports for reconciliation

Note – To place internal calls, just dial the extension; for external calls, dial “9”

Online
dept library home page –

Maintenance of the web pages: http://www.library.yorku.ca/ccm/pvt/
UserID:     Password:

Library Hours that are fed via RSS feed to the Library Home Page:
http://www.google.com/calendar/embed?src=1nrnldvryqbyvoq2ctgsjct9nn8%40g roup.calendar.google.com&ctz=America/Toronto

Currently, dept staff and ULO staff have access to update the hours. Further documentation: http://www.library.yorku.ca/ccm/web/docs/hours/

Caretaking Service Requests
dial 22401 or http://www.yorku.ca/csbo/requestform.html

Absence Reporting
Self: complete leave request form, sign and submit for approval by Mark Robertson
Staff – contact you directly, state reason and anticipated date of return

YUSA Collective Agreement
Meetings

Pan-Library Meetings
Listed in the YUL Google Calendar, which can be viewed and printed from the staff home page, or visit:
http://www.google.com/calendar/embed?src=ulo.yorku%40gmail.com&ctz=America/Toronto

Christina encourages Librarians and Department Heads to use the Google calendar for scheduling, and to give ulo.yorku access to see their free and busy time. It helps decide the best times for meetings, invitations can be sent and pan-library events can be sent directly to the staff web page.

Library Management Committee
- monthly on the 3rd Monday
- Librarian Department Heads and CPMs
- (see enclosed agenda/notes)

Library Forum
- monthly on the 2nd Tuesday
- all Librarians and CPMs

III. York University Libraries

Staff intranet
http://www.library.yorku.ca/staff
Username:
Password:
Here you'll find the YUL google calendar, staff phone & email list, Committee pages, policies and other useful information.

YUL Google Calendar:
address
The YUL calendar is public.

*we use this for:
- listing pan-library events
- checking librarians' availability
- scheduling meetings b/w librarians and ULO people. (using a Private ULO calendar)
- updating branch hours
Welcome to York Libraries, new hire!

**Mailing Lists**
Your email account has been included in the following mailing lists:

- Library Management Committee - LMC
- Library Forum – LF
- All Staff

**YUL listservs (with contact information):**

- **Reference-L:** reference related and general discussion. (Admin: Walter Giesbrecht walterg@yorku.ca) *you have been added to this list.*
- **Web Committee:** used by the committee, but open to other interested parties (Admin: Bill Denton wdenton@yorku.ca)
- **Information Literacy Committee:** used by the committee, but open to other interested parties (Admin: Sophie Bury sbury@yorku.ca)
- **Librarians' Group:** Librarians only, meets twice quarterly (Admin: Bill Denton wdenton@yorku.ca)

**Important Contacts**

**University Librarian's Office** – 416-736-5601 (or x55601)
Hours: 8:30am-4:30pm

- **Mark Robertson** markr@yorku.ca
  - Associate University Librarian
  - X88869 310 Scott
  - Issues related to operation of Department and staff

- **Glenn Cumming** gcumming@yorku.ca
  - Executive Officer
  - X88867 310 Scott
  - Issues related to Finance, Ereports, Expense accounts, Facilities, Personal Expense Reimbursement Accounts,

- **Anita Lee** anital@yorku.ca
  - Administrative Officer
  - X66592 310 Scott
  - Issues related to Human Resources, YUSA Collective Agreement, non-academic staff

**Library Computing Services**

For computing assistance, please contact lcshelp@yorku.ca.
A ticket will be entered and you will be contacted by a technician or appropriate LCS staff.
IV. Health and Safety Contacts in the Library

John Thomson, Manager, Facilities  
(Health and Safety Officer for the Libraries)

Glenn Cumming, Executive Officer  
Anita Lee, Administrative Officer

V. Emergency Contact and Procedures

If you require any security related information or if you would like to contact Security, please call 416-650-8000 or Ex. 58000. For more urgent matters contact 416-736-5333 or Ex. 33333. York’s Security Control Centre is staffed 24 hours every day. In a Life Threatening Emergency call 911 Directly.

<table>
<thead>
<tr>
<th>URGENT MATTERS</th>
<th>NON-URGENT MATTERS &amp; SERVICE ENQUIRIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call 416.736.5333 or Ex 33333</td>
<td>Call 416.650.8000 or Ex 58000</td>
</tr>
</tbody>
</table>

- If you observe suspicious persons or situations  
- First aid for non-life threatening incidents  
- When crimes such as thefts have taken place  
- Potential hazards  
- Hate Crime Incidents

- Building or room access  
- Minor floods, spills  
- General security information  
- Lost or stolen keys  
- Broken windows, walls or graffiti

In a Life Threatening Emergency call 911 Directly.

For situations where people or property is at immediate risk, for example a medical emergency, fire or a crime in progress we ask that you contact 911 directly, and then contact security services at 416-736-5333 or Ex. 33333. York Security meets and expedites emergency vehicles directly to the scene of the emergency so that valuable time is not lost searching for a particular building or location.

Keele Campus
York University  
4700 Keele Street, 228 William Small Centre  
Toronto, Ontario, M3J 1P3  
General Phone: 416.650.8000 or Ex. 58000  
Urgent Phone: 416.736.5333 or Ex. 33333  
Fax: 416.736.5377 or Ex. 55377  
E-mail: scc@yorku.ca

Glendon Campus
York University  
2275 Bayview Avenue, Greenhouse  
Toronto, Ontario, M4N 3M6  
General Phone: 416.650.8000 or Ex. 58000  
Urgent Phone: 416.736.5333 or Ex. 33333  
Fax: 416.736.5377 or Ex. 55377  
E-mail: scc@yorku.ca
Orientation/Socialization Checklists
New Employee Checklist

Employee Information

<table>
<thead>
<tr>
<th>Name:</th>
<th>Position:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hire date:</td>
<td>Library/Dept.:</td>
</tr>
<tr>
<td></td>
<td>Supervisor:</td>
</tr>
</tbody>
</table>

Prior to First Day of Employment

- □ Respond to letter/e-mail from Library Human Resources confirming appointment and confirm start date
- □ Visit the UCLA Transportation website to learn about parking/commuting options:
  - www.transportation.ucla.edu
- □ Review campus map to locate relevant buildings and parking lots
  - Review parking instructions for first day of employment and allow ample time
- □ Visit and peruse the Campus Human Resources website, UCLA Payroll and the At Your Service websites to learn about employment and benefits
  - http://www.chr.ucla.edu
  - http://www.payroll.ucla.edu
  - http://atyourservice.uccop.edu/
  - □ Create your At Your Service login/password

First Day of Employment

- □ Attend LHR New Hire Sign-In Appointment (Library Human Resources, Room 22478)
  - Bring work authorization documents to New Hire Sign-In Appointment
  - Review and complete all New Hire Paperwork
  - Learn about UCLA Benefits
  - Complete paperwork to obtain UCLA parking permit or bus pass
- □ Obtain employee ID number from HR Representative
- □ Go to UCLA Parking Services to obtain parking permit, or to Central Ticket Office for bus pass
- □ Meet with Supervisor and begin departmental orientation
- □ Create your UCLA Logon ID
- □ Schedule appointment with UCPD for Criminal Background Check and Identification and building use permit within first week of employment
- □ Organize work area, read orientation materials, etc.
- □ Review departmental procedure manuals

Your First Weeks of Employment

- □ Review Supervisor’s checklist to understand orientation process
- □ Obtain your Bruin Card
- □ Submit UCPD Criminal Background Check and Identification and Building Use Permit receipt to LHR
- □ Read about and analyze your Benefits Package
- □ Enroll in benefits during your Period of Initial Eligibility (PIE)—31 days after your hire date via the At Your Service website
- □ Review Personnel Policies for Staff Members or Labor Contract if represented by an exclusive bargaining agent (union)
- □ Learn about your vacation and sick leave accruals, usage and reporting
Explore the UCLA website, the UCLA Library’s public website and the Library Staff Intranet website:
   o http://www.ucla.edu
   o http://www.library.ucla.edu
   o http://staff.library.ucla.edu/

☐ Attend CHR New Employee Orientation Training session
☐ Check the UCLA Directory (http://www.directory.ucla.edu/search.php) to confirm your name and department information is correct
☐ Review campus emergency procedures on the EH&S website under Emergency Management

Your First Months of Employment

☐ Check your medical plan ID card when it arrives to ensure it reflects the correct information and your benefits information
☐ Review your paycheck to confirm it reflects your health and welfare choices, payroll deductions, personal information and more
☐ Complete University of California Office of the President’s (UCOP) mandatory Sexual Harassment Training for Supervisors (if applicable) -- UCOP generates invitation to online training based on job classification or EDB code input by LHR staff
☐ Complete UCOP’s Ethics & Compliance Program: http://www.directory.ucla.edu/search.php

Notes:
Supervisor New Hire Checklist

Employee Information

Name: ____________________________ Position: ____________________________

Hire date: ________________________ Library/Dept.: ____________________________

Supervisor: ________________________

Prior to the Employee’s Arrival

☐ Prepare new hire announcement and send to DLHR for distribution on first day initial/date__________
☐ Review details of email from LHR confirming selected candidate start date and sign-in appointment time initial/date__________
☐ Review copy of appointment letter sent to selected candidate initial/date__________
☐ Prepare departmental staff for the arrival of the selected candidate:
  o Make announcement to departmental staff about hire of selected candidate initial/date__________
  o Add name to departmental organizational chart initial/date__________
  o Set-up meetings with Departmental staff as appropriate initial/date__________
  o Determine who will orient and train selected candidate on which tasks/responsibilities/processes initial/date__________
☐ Ask for volunteers from your staff to serve as the “buddy” during the first six months; designate someone who has been employed with the UCLA Library at least one year (optional) initial/date__________
☐ Meet with the “buddy” before the employee arrives and discuss what role they will play and what activities the buddy will perform. Such activities might include introductions to departmental staff; tours of the department, library, and campus; being available to answer questions; having lunch with the employee, including the employee in library social activities initial/date__________
☐ Create schedule for first day initial/date__________
☐ Draft a plan for the first few weeks, which includes: meetings, tours, training, etc. initial/date__________
☐ Create agenda for first meeting with employee and plan to discuss employee schedule initial/date__________
☐ Review initial jobs assignments and training plans initial/date__________
☐ Determine where the employee’s work station or office will be and make arrangements as necessary to assign this work space to the employee initial/date__________
☐ Prepare the employee’s work space:
  o Arrange for computer for employee initial/date__________
  o Arrange for telephone, as appropriate initial/date__________
  o Ensure employee has a safe, secure place for personal belongings initial/date__________
  o Have work area cleaned/straightened; remove any personal effects left by previous employee initial/date__________
  o Stock desk with basic supplies (paper, pens, pencils, etc.) initial/date__________
  o Supply work space with telephone/campus directories and Library Telephone Directory initial/date__________
☐ Determine if/which keys will be needed and issued initial/date__________
☐ Send key request to Building Services or appropriate individual(s) within the Library (“key numbers needed) initial/date__________
☐ Create Supervisor file for selected candidate initial/date__________

Employee’s First Day of Employment

☐ Arrange for refreshments on first day of work to welcome employee (optional) initial/date__________
☐ Be available to pick up and greet the employee after the LHR sign-in initial/date__________
☐ Pick up employee at LHR and escort to department and workstation initial/date__________
☐ Meet with the employee to orient them to the workplace and provide an overview of the first day’s activities initial/date__________
☐ Review resources for employees (include links to these sites) initial/date__________
☐ Explain payroll cycle/check pick-up or direct deposit options initial/date__________
Supervisor New Hire Checklist

- Explain leave reporting policies and procedures and time reporting system (timesheets) initial/date__________
- Discuss your availability during the orientation. Include your supervisory approach/philosophy initial/date__________
  - Discuss reporting relationships and lines of authority initial/date__________
  - Discuss organizational structure and interrelationships initial/date__________
- Provide tour of immediate work area and department ensuring that the employee knows the basics (public/staff entrances, work areas, restrooms, fire exits, etc.) initial/date__________
- Introduce employee to all department staff and briefly describe each person’s function initial/date__________
- Have lunch with employee individually or in a group (optional) initial/date__________
- Discuss work schedule and outline departmental notification process for illness, lateness or schedule adjustment initial/date__________
- Explain to employee how to obtain UCLA Logon ID (Bruin Online Account) initial/date__________
- Complete New Account Request Form to set up via (http://services.library.ucla.edu/welcome/netcreate/delete.html) initial/date__________
  - Email Account initial/date__________
  - Network Account initial/date__________
  - Oasis Access (If employee needs Oasis system access see Department Security Administrator) initial/date__________
- Allow time for employee to organize work area, read orientation materials, obtain parking permit, etc. initial/date__________
- Discuss personal use of office equipment (phone, fax, computing equip., printer, copiers) initial/date__________
- Inform the employee of his/her new phone number initial/date__________
  - Review telephone policies and procedures, including voicemail and long distance calls initial/date__________
  - Help employee set-up voicemail initial/date__________
  - Review campus emergency telephone procedures initial/date__________
- Provide the employee with your department’s campus mail address, local address, and phone/fax numbers; explain campus and U.S. mail system, how they are used and approximate delivery/pick-up schedules initial/date__________
- Review library and department policies on food and drink, headphones, etc. initial/date__________
- Discuss Emergency Procedures:
  - Suggest employee to sign up for Bruin Alert system for cell phones/PDAs initial/date__________
  - Security protocol for department (building access, visitors, etc.); discuss emergency procedures; security; escort services initial/date__________
  - Location of unit’s copy of the Disaster plan; evacuation plan for your building; library unscheduled closing and hours line initial/date__________
  - Safety Program and Emergency Response initial/date__________
  - What to do if a library visitor has an accident or injury initial/date__________

**Employee’s First Few Days**

- Give the employee a copy of his/her job description OR Statement of Responsibilities initial/date__________
- Discuss job responsibilities and Supervisor’s expectations initial/date__________
- Determine preliminary work assignments for first two weeks, meet with employee, make assignments and describe expected outcomes initial/date__________
- Introduce the employee to the person who will be his or her trainer initial/date__________
- Discuss and schedule appropriate training sessions initial/date__________
- Set up additional departmental, library, and campus tours as appropriate to the position initial/date__________
- Create a plan for how/when to introduce employee to library and university staff outside of the department as appropriate during tours and meetings initial/date__________
- Introduce employee to staff in other departments and library administration and briefly describe each person’s function initial/date__________
- Set up short welcome/orientation meetings with department head, supervisory AUL, DUL, UL, DLBES, DLHR as appropriate initial/date__________
- Provide overview of library organization; discuss library departments; history of department; unit organization and hierarchy initial/date__________
1. Provide employee with the link to the UCLA Library's current strategic plan; ask employee to read it within three weeks.
2. Review office protocol/procedures: files, mail, fax machine, copiers, email, supplies (explain use of equipment, location and how to obtain supplies).
3. Discuss timesheet and leave reporting policies and procedures; overtime/comp. time (if applicable); sick/vacation accrual; department flextime (if applicable).
4. Discuss with the employee how and to whom to request/report schedule adjustments, absences, late arrivals, illnesses, and emergencies; review attendance policies pertinent to your department.
5. Train employee how to use Outlook to access email and calendar; department intranets, etc.
6. Set up weekly meeting between supervisor and employee for first three months.
7. Provide employee with list/schedule of any standing group meetings they are required to attend.
8. Introduce designated "buddy"/mentor (optional).
9. Review location of bulletin boards and special notices within unit.
10. Add employee's information to departmental contact list/phone tree.
11. Provide employee with contact information for Supervisor and department as appropriate.
12. Distribute keys/assign Omni lock codes to employee as appropriate.
13. Arrange times with the employee to orient them to:
   - Library's public website: [library.ucla.edu](http://library.ucla.edu)
   - Library staff intranet: [staff.library.ucla.edu](http://staff.library.ucla.edu)
   - University Librarian's Blog: [blogs.library.ucla.edu/universitylibrarian](http://blogs.library.ucla.edu/universitylibrarian)
   - Library SharePoint sites, sandbox, etc.
   - Departmental websites, blogs, wikis, etc.
   - Relevant University websites: CHR Training and Development, UCLA campus, etc.
14. Advise the employee to review departmental procedure manuals.
15. Explain Systems and Facilities Help Desk procedures.

**Employee's First Few Weeks**

1. Discuss the Library Strategic Plan and the Unit Work Plan with employee after both documents have been read:
   - Explain the function, mission, and priorities of your department in the context of the strategic plan.
   - Discuss philosophy and general goals of unit within the context of the UCLA Library and UC.
   - Discuss/explain the importance of the employee's job.
   - Provide the employee with a copy of the current fiscal year Unit Work Plan and discuss the status of the work plan.
   - Develop a timeline for an orientation work plan for the employee that extends through the end of the fiscal year.
   - Document their orientation work plan in writing for Supervisor, Dept. Head, and/or AUL approval.
1. Explain performance management procedures for type of appointment and performance expectations.
   - Explain librarian salary scale, peer review, and career status process.
   - Explain staff salary scale, performance evaluation cycle, and career status process.
2. Provide appropriate and timely feedback of work as it is performed and clarify performance expectations as needed.
1. Review and discuss UCLA Library's Learning & Development Curricular Framework:
   - Determine immediate need for specific internal or external training and register as appropriate.
   - Determine core competencies needed for the job.
   - Assess skills as they relate to job duties, evaluate the need for training, and schedule on the job or external training as appropriate.
   - Use Learning & Development Curricular Framework to identify potential courses.
   - Assess basic computing skills and evaluate the need for further training.
   - Assess supervisory skills and evaluate the need for further supervisory training and UCLA specific training.
Supervisor New Hire Checklist

- Assess need for UCLA Personnel Systems training as it relates to the job duties and register for appropriate courses initial/date
- Assess need for UCLA Financial Systems training as it relates to the job duties and register for appropriate courses initial/date
- Assess need and interest in UCLA CHR Certificate Programs and register for appropriate courses:
  - UCLA CHR Level I Supervisory Certificate Series initial/date
  - UCLA CHR Financial Management Certificate Program initial/date
- Assess need to attend the UC Business Officer Institute; discuss with Deputy University Librarian and nominate as appropriate initial/date
- Determine eligibility for internal career/leadership development programs, and provide information to employee
  - UCLA Staff Enrichment Program initial/date
  - UCLA Professional Development Program initial/date
  - UC Management Skills Assessment Program initial/date
- Assess need and interest in external leadership development programs; e.g., ACRL/Harvard Leadership Institute, Prye Leadership Institute, etc. initial/date
- Outline a written Learning & Development Plan initial/date
- Discuss travel and reimbursement policies and procedures and provide links to appropriate Library, UCLA and UC websites initial/date
- Schedule discussion of employee's workstation with Library Ergonomic Coordinator (LHR Coordinator) to ensure the workstation arrangement meets the employee's needs initial/date
- Request order of business cards (optional) initial/date
- Discuss meetings (Library, department, etc.) and which meetings employee is expected to attend initial/date
- Outline departmental resources and sources of information initial/date

Employee’s First Few Months

- Evaluate staff employee during fourth month of probationary period initial/date
- Provide regular and timely feedback on work performed initial/date
- Make sure all departmental and other tours have been completed initial/date
- Explain availability of library meeting rooms and procedures for making reservations initial/date

Administrative Items for Supervisor during First Days/Weeks of Employee’s Employment

- Complete staff directory form and submit to LHR (get staff directory form online) initial/date
- Add employee to department listservs and routing lists. If applicable, also add him/her to the department telephone tree initial/date
- Schedule employee for new student training session with LHR/LBES representative if employee supervises students initial/date
- Confirm that employee has attended CHR New Employee Orientation initial/date

Notes:

For all staff positions: to be submitted to LHR in conjunction with 4 month probationary period evaluation.
For all librarian positions: to be submitted to LHR in conjunction with 6 month probationary period evaluation.
This document will be filed in the employee’s personnel file in LHR.

<table>
<thead>
<tr>
<th>Employee Signature</th>
<th>Date</th>
<th>Department Head Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor Signature</td>
<td>Date</td>
<td>AUL Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Name:</td>
<td>Start Date:</td>
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<td></td>
<td></td>
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<tr>
<td>Title:</td>
<td>Supervisor:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department:</td>
<td>Classification/Rank:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### I. Payroll/Benefits Information
- **1st paycheck** – 
  - During your UGA online orientation you will have an opportunity to fill out a Direct Deposit form.
- To view electronic check stub go to the [University's Self Service Website](https://employee.uga.edu/FacStaff/index.jsp)
- Benefits can be effective on your start date, anytime between your start date and the end of the month, or the first day of month following your start date. Q & A Benefits Information Session (1st & 3rd Mondays, 9:00-10:30 a.m. @ UGA HR, Training & Development) Enroll online using [HR Connection Guidelines for New Employees](http://www.hr.uga.edu/benefits/hrc_user_guide.pdf)
- [COBRA](http://www.hr.uga.edu/benefits/cobra.html)
- Teachers Retirement System of Georgia (TRS) [www.trsga.com](http://www.trsga.com) – Participating mandatory. You will receive a welcome letter from TRS with instructions to visit the TRS website to create a user account where you may designate beneficiaries, update personal information, and check account balances.
- Optional Retirement Plan (ORP) [http://www.hr.uga.edu/benefits/bensumm/orp.html](http://www.hr.uga.edu/benefits/bensumm/orp.html) (Faculty, key administrators and newly-hired exempt benefit-eligible staff have the opportunity to make a one-time irrevocable decision to participate in an ORP in lieu of the TRS. This decision must be made within 60 days following employment.)

### II. The Basics
- Establish UGA MyID account & create an Email Account [https://myid.uga.edu/](https://myid.uga.edu/)
- Registering preferred e-mail account for official UGA communications [www.emailinfo.uga.edu](http://www.emailinfo.uga.edu)
- GRAPEVINE Posting Policy (Libraries' listserv) [http://www.libs.uga.edu/staff/grapevine.html](http://www.libs.uga.edu/staff/grapevine.html)
- Guidelines Register for Online Calendar Account [www.uga.edu/eits/calendar](http://www.uga.edu/eits/calendar)
- Parking procedures [www.parking.uga.edu](http://www.parking.uga.edu)

### III. Schedule and Leave
- Work Schedule [www.libs.uga.edu/staff/worksched.html](http://www.libs.uga.edu/staff/worksched.html)
- Sick & Annual leave accrual/usage [http://www.hr.uga.edu/benefits/bensumm/paid_summ.html](http://www.hr.uga.edu/benefits/bensumm/paid_summ.html)
- Other Leave [http://askuga.uga.edu/default.asp?id=961&SID=&Lang=1](http://askuga.uga.edu/default.asp?id=961&SID=&Lang=1)

### IV. Services and Fringe Benefits
- Staff Borrowing Privileges [http://www.libs.uga.edu/access_services/borrowing/staff.html](http://www.libs.uga.edu/access_services/borrowing/staff.html)
- Training & Development: [http://www.libs.uga.edu/humres/training/index.html](http://www.libs.uga.edu/humres/training/index.html)
- UGA Campus Transit [www.busfin.uga.edu/transit/](http://www.busfin.uga.edu/transit/)
- Athens Transit [www.athenstransit.com](http://www.athenstransit.com)
- UGA Extras [http://www.hr.uga.edu/benefits/uga_extras.html](http://www.hr.uga.edu/benefits/uga_extras.html)
- Tuition Assistance Program (TAP) [http://www.reg.uga.edu/or/nsf/preview/(TAP)%20Homepage](http://www.reg.uga.edu/or/nsf/preview/(TAP)%20Homepage)
  - Contact the UGA TAP Coordinator if you have questions: Jack Panneceoucke, Tel: (706) 542-9362, Email: [jep@uga.edu](mailto:jep@uga.edu)

### V. About the Libraries
- Mission Statement [http://www.libs.uga.edu/staff/missionstate.html](http://www.libs.uga.edu/staff/missionstate.html)
- Facilities: [http://www.libs.uga.edu/libinfo.html](http://www.libs.uga.edu/libinfo.html)
- Special Collections: [http://www.libs.uga.edu/special_collections/index.shtml](http://www.libs.uga.edu/special_collections/index.shtml)
- Libraries Departments: [http://www.libs.uga.edu/admin/depthead.html](http://www.libs.uga.edu/admin/depthead.html)
- Personnel News [http://www.libs.uga.edu/humres/persnews/persnews.html](http://www.libs.uga.edu/humres/persnews/persnews.html)
- Staff Recognition // ASSET Awards [http://www.libs.uga.edu/asset/index.html](http://www.libs.uga.edu/asset/index.html)
- University Librarian and Associate Provost: Dr. William Gray Potter [http://www.libs.uga.edu/admin/index.html](http://www.libs.uga.edu/admin/index.html)
University of Georgia Libraries New Employee Checklist

Hiring Department/Unit (rev. 08/10)

Name: 
Title: 
Department: 
Classification/Rank: 

Probationary Evaluation Schedule

<table>
<thead>
<tr>
<th>Due 1</th>
<th>Due 2</th>
<th>Due 3</th>
<th>Due 4</th>
<th>Due 5</th>
<th>Prob. Due</th>
</tr>
</thead>
</table>

I. The Basics

- UGA Online Orientation [http://www.hr.uga.edu/ori/orient.html](http://www.hr.uga.edu/ori/orient.html)
- Department tour
- Library Tour (location of restrooms, vending, staff lounge, ‘Tween the Pages)
- Various departmental policies (food, drink, noise, cell phone use, parties, office hours, etc.)
- Office key assignment (Becky Wortham - bwortham@uga.edu)
- Computer log-in, set-up, access
- E-mail log-in, set-up
- Establish and register a preferred e-mail account for official University communications [www.emailinfo.uga.edu](http://www.emailinfo.uga.edu)
- Departmental administrative and organizational communication protocols.

II. Job responsibilities/evaluation

- Review of job description
- Probationary & Annual evaluation procedures
- Departmental overview/goals/projects
- Libraries Mission/Strategic Plan related to Dept.

III. Schedules, Attendance and Leave

- Work schedule
- Break & lunch schedules
- Timesheet/payroll procedures and schedules
- Use and request of annual leave & scheduled sick leave
- Notification process when ill or tardy
- Use of work time for training, professional development, educational purposes
- Independent professional activities policy
- Travel & Funding Guidelines
- Family and Medical Leave [http://www.hr.uga.edu/fmla/fmla_intro.html](http://www.hr.uga.edu/fmla/fmla_intro.html)

IV. Safety, Security & Ethics

- Personal accident/injury reporting – Worker’s Compensation [http://www.libs.uga.edu/staff/workerscompguidelines.pdf](http://www.libs.uga.edu/staff/workerscompguidelines.pdf)
- SecureUGA (modules 1-10) [https://secure.uga.edu](https://secure.uga.edu) **Mandatory**
- Building/Department emergency procedures (including links to emergency plans) [http://www.libs.uga.edu/access_services/security/index.html](http://www.libs.uga.edu/access_services/security/index.html)
- University Office of Security & Emergency Preparedness [http://www.osep.uga.edu](http://www.osep.uga.edu)
- USG Ethics Course [http://www.hr.uga.edu/ethics.html](http://www.hr.uga.edu/ethics.html) **Mandatory**
- University Risk Management Office >> View the “Driving Do’s & Don’ts Training Video” (Click link, then scroll down to video) [http://www.doas.georgia.gov/StateLocal/RiskPages/RiskInsurance.aspx](http://www.doas.georgia.gov/StateLocal/RiskPages/RiskInsurance.aspx) **Mandatory**

VI. Telephones/Copies/Supplies/Mail

- Personal Use of Office Equipment (Phone, Fax, Computing Equipment, Printer, Copiers)
- Long distance authorization card, if applicable
- Office Supply requests
- Location & how to use photocopier
- Mail regulations and procedures

New Employee Date 
Supervisor/Department Head Date
Form that is shared with Supervisors of New Employees

Library Services - New Employee Orientation Checklist

<table>
<thead>
<tr>
<th>Employee</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Start Date</th>
</tr>
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<tbody>
<tr>
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</tr>
</tbody>
</table>

**Preparation**

- [ ] New Employee Profile Form (attached)
- [ ] Designated work space/cubicle
- [ ] Office supplies
- [ ] Paperwork and forms
- [ ] Meet the Team
- [ ] Quiet place to meet
- [ ] Lunch arrangements in first week

**Mandatory Activities**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buildings tours (Jefferson, Adams, Madison)</td>
<td></td>
</tr>
<tr>
<td>Session with ALLS</td>
<td></td>
</tr>
<tr>
<td>Session with Deputy Librarians</td>
<td></td>
</tr>
<tr>
<td>Session with Directors/ABA &amp; C&amp;S</td>
<td></td>
</tr>
<tr>
<td>Session with Directors/POP &amp; Tech Pol</td>
<td></td>
</tr>
<tr>
<td>Session with Director/Preservation &amp; Tour</td>
<td></td>
</tr>
<tr>
<td>“Be a Book” Tour</td>
<td></td>
</tr>
<tr>
<td>ITS Security Course (online)</td>
<td></td>
</tr>
<tr>
<td>“Ethics Briefing: Standard of Conduct for Library Employees, Online version”</td>
<td></td>
</tr>
<tr>
<td>COIN Course (in person)</td>
<td></td>
</tr>
</tbody>
</table>
Elective Activities

New staff will select and complete at least five of the activities listed at the bottom of this checklist in the first six months of work in Library Services.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

Elective Activities Examples

Attend: An Exhibit, Concert in the Coolidge Auditorium, Noon Treasure Talk, Gallery Presentation by a Curator, TOPS lecture, “LC’s Digital Future and You” presentation, or similar events. See http://www.loc.gov/today for ideas.

Participate in at least one meeting of a Language Table or another Employee Association. See: http://www.loc.gov/staff/page.php?name=clubs

Watch a Webcast from http://www.loc.gov/today/cyberlc/index.php

Complete a course such as ILS Searching or the Research Orientation to the Library of Congress. See http://www.loc.gov/rr/main/inforeas/orient.html and http://www.loc.gov/staff/idt/ for ideas.

10/06/10
New Employee Orientation

Unless otherwise noted arrangement for these duties will fall to the unit administrator (UA).

At hiring

• Determine if there is a need for furniture, new telephone or electrical services or computing equipment. Work with Dean’s Office and Systems Department to accomplish.

One month out

• Remind Systems of computing needs

Two weeks out

• Contact Systems re new employee’s arrival – verify start date and remind of computing needs
• Obtain vehicle information from new employee to acquire temporary (one week) parking permit; alternatively, if the new employee is given their position number, they can obtain a regular permit (verify up to how far in advance)
• Contact library senior administrative officer re setting up benefits meeting- get date for benefits meeting so this can be factored into early scheduling of new employee; remind about need to post announcement re new employee on email and if faculty need for notebook.
• Contact Coordinator of Library Publications and Information to get out announcements about new hire to appropriate media outlets
• Schedule appointment for new employee to meet with Dean
• Check with Dean’s Office about availability of keys for new employee
• Check to see if new employee’s work area is clean and stocked with supplies
• Plan welcome within department

First Day

Within the Dean’s Office

• Payroll, check distribution (JG)
• Keys (JH)
• Parking Permit Info (JG)
• ID Card – through sectioning at Student Union (JG)
• Review benefits sign up and tell employee when their session is scheduled (JG)
• Secure temporary access to campus network – applications, set up machine (Systems)
• Post announcement to full-time library employees re new employee in In the Loop
• Speak with Dean’s Office staff re name badges (MW)
Within the Department (Unit Administrator)

- Intro to office area, supplies, other staff members, students
- Telephone operation, long distance, etiquette, policies etc.,
- Photocopying, card, personal use, polices
- How to check out books for personal use
- (STAFF ONLY) probation, evaluation, vacation, sick leave
- Tour of Library/Departments

First Week

Within the Dean’s Office

- Meet with Dean and receive notebook from Dean (JG, HC)

  Notebook should have:
  - Library Mission statement
  - Phone lists, staff lists, floor maps, branch info, organization chart, statistical data, Intro to the OSU Library, Intro to OPAC, Circ info
  - APLU and the land grant tradition
  - Faculty Handbook
  - Reappointment Promotion Tenure Info (JFP)
  - 11-Month Appointment Information
  - Sick Leave Process
  - Fee Waiver, enrollment info
  - Library committee info
  - Library Faculty by-laws
  - Edmon Low Library Staff Association by-laws
  - Travel guidelines
  - List of University Policies and Procedures available on website
  - Info regarding Friends of the OSU Library and opportunities to give to the Library and the University

Within Office (UA or designated)
OKLAHOMA STATE UNIVERSITY
New Employee Orientation

- Computer: public access terminals guidelines
- Review leave policies
- Attend OPAC training
- Gobi training (may be delayed due to start date/primary assignment)
- Campus Tour
- Collection Development Liaison (may be delayed due to start date/primary assignment)
- Training room session
- Approval plan (may be delayed due to start date/primary assignment)
- Reference desk policies and procedures, in-depth tour of reference area
- Role of faculty, staff, and students within dept.

First Month (UA unless otherwise designated)

- Welcome lunch with welcome committee
- Go over notebook from Dean
- History of OSU and Library (JFP)
- OPAC staff mode training, (JLJ-circ), (BB-acq)
- Begin in-depth tours of library departments

First Quarter

- Instruction- discuss and observe instructional sessions if appropriate
- Meet with appropriate AD
- Meet with Library Faculty Chair to discuss organization
- Review Reappointment Promotion Tenure info towards end of quarter (JFP)
University Library Pre-Arrival Checklist for New Employees

For Supervisors & Branch Heads

Employee Name: ________________________________________________

Arrival Date: ________________________________________________

- Announce new employee’s arrival date, position, duties to branch staff
- Prepare the work area e.g. clean out desk and files, review remaining materials for appropriateness
- Gather and have available written materials that pertain specifically to the new employee’s immediate work environment and responsibilities, including:
  - Branch staff list/organization chart with basic job responsibilities of each person
  - Email and telephone lists for staff
  - Job description
  - Diagram of evacuation route for building
  - U of S and Saskatoon telephone directories
  - Parking information
  - Collective agreement (can be found on the HRD website)
  - Appropriate professional organizations
- Ensure basic office supplies are available
- Order keys (can be obtained from Tammy Hornung)
- Install telephone or complete change order (arrangements to be made by Tammy Hornung)
- Arrange for computer and software installation. Email and system orientation will be arranged by the HR Manager as part of the employee’s orientation.

October 2008
New Employee Orientation Checklist

The Orientation and Retirement Team created this checklist to use once a new employee has been hired. Included on the checklist are things to cover beyond the needs of a specific position. We hope you find it helpful and we’d like to make it even more useful so send us any comments or suggestions.

The University’s Human Resources, the Libraries’ Human Resources, supervisor and new employee all have responsibilities for the successful transition of a new hire.

**S=Supervisor**  **LHR=Libraries Human Resources**  **E=Employee**

### Once a person is hired

<table>
<thead>
<tr>
<th>LHR</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LHR</td>
<td>Send a welcoming letter along with a campus map. Includes contact information for any questions. Lets new hire know what kind of identification she will need to bring in to complete her paperwork.</td>
</tr>
<tr>
<td>LHR</td>
<td>Send notice of hire and first day to include in LINKS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>S</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Send a welcome note signed by everyone in the department</td>
</tr>
<tr>
<td>S</td>
<td>If the person is relocating send a city map and offer the names of realtors and rental agencies.</td>
</tr>
<tr>
<td>S</td>
<td>Give the person contact information for any questions not related to HR.</td>
</tr>
<tr>
<td>S</td>
<td>Give work and office phone numbers and e-mail addresses of anyone willing to assist in the transition</td>
</tr>
<tr>
<td>S</td>
<td>(moving, orienting them to new location, etc).</td>
</tr>
</tbody>
</table>

### Before the person begins

<table>
<thead>
<tr>
<th>LHR</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LHR</td>
<td>request a UserID a few days before the new hire arrives and ask UTS to send the new employee’s email username to you. UTS won’t set it up more than a few days before the effective date.</td>
</tr>
<tr>
<td>LHR</td>
<td>Sends information about parking decal</td>
</tr>
<tr>
<td>LHR</td>
<td>Tells supervisor new hire’s email address. Communicates phone number and e-mail address to Circulation for incident report emails, Communications for LINKS distribution list, Dean’s Administrative Assistant, and Computing Services for Contacts webpage.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>S</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Communicate with the new hire about logistical issues (parking, when and where to report, work schedule/hours). Offer to make referrals to stores, car repair, insurance agents, dry cleaners, credit unions, etc.</td>
</tr>
<tr>
<td>S</td>
<td>Assess immediate equipment needs</td>
</tr>
<tr>
<td>S</td>
<td>Work with Maggie Bergmans for phone and voicemail requests. Give phone number to LHR for further distribution.</td>
</tr>
<tr>
<td>S</td>
<td>Work with Cherrie Brown if keys are needed.</td>
</tr>
</tbody>
</table>
If Millennium client access is required consult with ILS System Administrator regarding logons.

Inform Director of Administrative Services to have a mentor assigned if new hire is in a tenure-track position.

Consider sending announcement to LINKS with a little more description of the position (if appropriate), previous work experience, and educational background.

Inform department members when new employee is expected to relocate and begin work.

Prepare work space
  ___ Clean office space and stock with any essential office supplies
  ___ Make a copy of the most recent library roster
  ___ Make arrangements the first week for breaks and lunch.

Assemble written materials to give to the new employee (or if on Libraries webpages or intranet communicate where materials can be found)
  ___ organizational history
  ___ mission statement
  ___ vision statement
  ___ organizational charts
  ___ employee handbook
  ___ Faculty Manual (university)
  ___ Annual reports
  ___ operations manual
  ___ maps (library locations, campus)
  ___ library publications
  ___ telephone and email directory
  ___ list / directory of key people
  ___ pay schedule (also covered by LHR)
  ___ job description
  ___ training program schedule

Make arrangements for some breaks and lunches the first week.

Consider assigning a buddy.

When you get new employee’s UserID, you will need to get the Libraries Computing Services to set up a profile on the computer she/he will be using.
## First day

| S ___ | Welcome new employee |
| S ___ | Take new employee to Libraries Human Resources in the morning so paperwork can be completed and turned in to the University’s HR. (Schedule ahead with Ann, expect it to take 45-60 minutes). **will not be in VIP until his/her paperwork is entered in the system** |
| LHR ___ | ___ Get emergency contact information  
 ___ Tell employee someone from Benefits Office will contact him/her about a benefits orientation  
 ___ Tell staff employee that someone from Professional Development will contact him/her about attending a University Orientation  
 ___ Tell employee attendance at a Sexual Harassment Workshop is mandatory and information to schedule attendance will be sent  
 ___ Tell employee a member of the Libraries Orientation and Retirement Team will contact him/her about attending a University Libraries orientation.  
 ___ Give employee a copy of the Implementation of Variable Work Schedules  
 ___ Tell employee it will be about two weeks before he/she can get a CarolinaCard (USC ID). Give employee the phone number to verify he/she is in the system. Tell employee where to go to get the card and what ID to take.  
 ___ Give employee a benefits overview and go over **Information for Employees** or **Information for Supervisors**  
 ___ Send two copies of a staff employee’s position description and tell supervisor when staff employee’s planning stage is due. Send information needed for planning stage (name, social, job class slot).  
 ___ Tell supervisor what information has been sent to the new employee. |
| S ___ | Review position description, job duties and responsibilities |
| S ___ | Review orientation schedule |
| S ___ | Meet co-workers |
| S ___ | Tour the library with emphasis on immediate need and “personal” spaces (department members if dispersed, staff lounge (give the code), staff bathroom (give the code), public bathrooms, Cooper’s Corner, emergency exit procedures, any likely meeting rooms, library hours) |
| S ___ | Any applicable safety issues with equipment or people including safeguarding personal possessions, first-aid supplies, responding to fire drills |
| S ___ | Assign an initial work task (something to be accomplished the first day, the first week) |
Examples:
____ reading (manual, Libraries webpages)
____ set up voicemail
____ arrange desk and office space
____ Review files created by the previous job holder
____ Schedule interviews with key people
____ many more possibilities related to a new employee’s specific position

Benefits Office will contact the new employee about attending the Benefits Orientation, and it will be within 31 days of his/her date of hire.

Sexual Harassment workshop. Those workshops are usually in November and April and LHR will inform the new employee of the details.

First Week

S _____ Review personnel policies
   ___ Work hours and scheduling
   ___ Reporting work hours in Itams
   ___ Breaks
   ___ Types of leave (sick, annual, comp time, conference, release time, flex time)
   ___ Expectations for calling in sick
   ___ Inclement weather policy
   ___ Staff development programs/training (including campus training)
   ___ Dress code
   ___ Orientation to departmental resources (policies, procedures manuals, where to get and how to request supplies)
   ___ Mail policies and procedures for campus mail
   ___ Eating/drinking in department and library
   ___ Requesting time off for vacation
   ___ Thomas Cooper Library backdoor policy

S _____ Explain phone (including voicemail if appropriate)

S _____ Explain e-mail system (client, web interface). Find your department’s copy of the Outlook book.

S _____ If appropriate, have employee order business cards when email address is known. Remember that something can be printed on the back as well.

S _____ Discuss and review unit or department policies

S _____ Tour the library concentrating on key operations and relations to one’s own position and department. Have the new hire meet at least one person in a department.
**Orientation and Retirement Team** will try to organize tour of all the campus libraries within the first 3 months. (If position has more immediate or deeper need than a general introduction schedule meetings individually)

<table>
<thead>
<tr>
<th>S</th>
<th>Discuss library organization (including committees and teams), library goals and objectives, library-wide policies</th>
</tr>
</thead>
<tbody>
<tr>
<td>E</td>
<td>Individual meetings with unit staff</td>
</tr>
<tr>
<td>E</td>
<td>Make appointments to meet key people (people identified by supervisor). Training in core job areas</td>
</tr>
<tr>
<td>E</td>
<td>Have new employee meet with Head, Library Computing Services if necessary regarding ergonomic computing and remote needs.</td>
</tr>
<tr>
<td>S</td>
<td>Departmental and Common shared drives</td>
</tr>
<tr>
<td>S</td>
<td>Review confidentiality, especially for anyone working with patron records but applicable to other situations</td>
</tr>
<tr>
<td>S</td>
<td>Consider planning a coffeebreak or lunch with the department to celebrate the new member’s arrival</td>
</tr>
<tr>
<td>LHR</td>
<td>Tuition reimbursement</td>
</tr>
<tr>
<td>E</td>
<td>Recreational facilities and programs (explores USC website or materials to be created by Orientation and Retirement Team)</td>
</tr>
<tr>
<td>E</td>
<td>Campus events (explores USC website or materials to be created by Orientation and Retirement Team)</td>
</tr>
<tr>
<td>E</td>
<td>Recreation and wellness (explores USC website or materials to be created by Orientation and Retirement Team)</td>
</tr>
<tr>
<td>E</td>
<td>With supervisor’s approval, take a campus tour. Tours are available Monday through Friday at 11 a.m. and 2 p.m. Reserve a spot <a href="http://www.sc.edu/visitorcenter/showSelfServiceWizard.do?admissionStatus=NE">http://www.sc.edu/visitorcenter/showSelfServiceWizard.do?admissionStatus=NE</a></td>
</tr>
</tbody>
</table>
| E | Want to learn more about the university?  
  - subscribe to the ANNOUNCE listserv [http://www.sc.edu/announce/join.html](http://www.sc.edu/announce/join.html)  
  - read USC Times backfiles [http://www.sc.edu/usctimes/](http://www.sc.edu/usctimes/) |
| E | Want to learn more about the community?  
  - Pick up a *FreeTimes* (available near Thomas Cooper Library exit and area businesses or online [http://www.free-times.com/](http://www.free-times.com/)) |
| S | Ask new employee what questions he/she has about:  
  - the libraries  
  - the university  
  - the department  
  - his or her job |
| S | Determine what you expect the new employee to accomplish during the first three months on the job. Discuss with new employee. |
Define the amount of authority the new employee has during the first three months

First Month

**E ____** “Tour” the intranet (Supervisor highlights any key documents)

**E ____** After new employee receives a CarolinaCard, contact Library Computing Services (Tony Branch) and give him your UserID and password so new employee can be added to Active Directory. Expect to be in the system and be able to get a CarolinaCard within the first two weeks.

Contact Library Computing Services (Randy Heard) with the barcode so you can be entered into the back door database for swiping your card to enter Thomas Cooper Library.

**E ____** If you have liaison responsibilities, take your own tour of the department/college.

**S ____ or contact Reference Department** Once employee has a CarolinaCard explain library services available to the employee for work or enjoyment (Requesting materials in the catalog, PASCAL Delivers, Interlibrary Loan, Educational Films, audiobooks, Browsing Collection, Juvenile Collection)

**E ____** Ask new employee what questions he/she has about:

- __ the libraries
- __ the university
- __ the department
- __ his or her job

Later

**E ____** Attend the orientation and tour of libraries and Annex tour organized by the Libraries’ Orientation and Retirement Team.

**E ____** Faculty positions. The Provost holds an orientation for new faculty in August. Plan on attending at least some of it. It’s a great way to meet other faculty members from across the university. You should receive an invitation [http://www.sc.edu/cte/newfaculty/](http://www.sc.edu/cte/newfaculty/)

Compiled by Marilee Birchfield for the Orientation and Retirement Team for University Libraries at the University of South Carolina. December 2010.
DEPARTMENTAL ORIENTATION CHECKLIST

Employee’s Full Name:_______________________________________________  Employee #:____________

Department:_________________________________  Department Contact:___________________________

Date of Hire:_________________________________  Phone:______________________________________

This checklist is designed to assist hiring departments and new employees with departmental orientation. Departmental representatives need to discuss the items below with new hires, then sign and date the back of this form to indicate completion. The completed form should be placed in the employee’s departmental file.

<table>
<thead>
<tr>
<th>DEPARTMENT</th>
<th>Completed(✓)</th>
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<tbody>
<tr>
<td>Via Telephone with New Employee</td>
<td></td>
</tr>
<tr>
<td>(Prior to first day of employment)</td>
<td></td>
</tr>
<tr>
<td>Confirm first day/work hours</td>
<td>☐</td>
</tr>
<tr>
<td>Discuss dress code/uniform distribution</td>
<td>☐</td>
</tr>
<tr>
<td>Discuss payroll frequency, overtime pay (straight pay and time and one half rate)</td>
<td>☐</td>
</tr>
<tr>
<td>Discuss parking arrangements; provide directions to Dept. of Parking and Transportation</td>
<td>☐</td>
</tr>
<tr>
<td>Emphasize the importance of benefits/payroll appointment</td>
<td>☐</td>
</tr>
<tr>
<td>Obtain emergency contact phone numbers</td>
<td>☐</td>
</tr>
<tr>
<td>Complete Section 1 of I-9 (online)</td>
<td>☐</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department Arrangements</th>
<th>Completed(✓)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Prior to first day of employment)</td>
<td></td>
</tr>
<tr>
<td>Introduce new employee by e-mail or letter</td>
<td>☐</td>
</tr>
<tr>
<td>Select current employee to assist new employee; inform current employee of expectations</td>
<td>☐</td>
</tr>
<tr>
<td>Assign 1st day/1st week checklist activities to appropriate staff</td>
<td>☐</td>
</tr>
<tr>
<td>Provide workspace and necessary office equipment/supplies</td>
<td>☐</td>
</tr>
<tr>
<td>Prepare department orientation agenda</td>
<td>☐</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>1st Day/1st Week</th>
<th>Completed(✓)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor to greet new employee at start of first day</td>
<td>☐</td>
</tr>
<tr>
<td>Introduce new employee to current employee who was assigned to assist</td>
<td>☐</td>
</tr>
<tr>
<td>Accompany new employee to his/her office</td>
<td>☐</td>
</tr>
<tr>
<td>Review computer set up, log on, e-mail, data security and Responsible Computing Handbook</td>
<td>☐</td>
</tr>
<tr>
<td>Review phone number and phone system training, FAC (Forced Access Code), phone mail as applicable</td>
<td>☐</td>
</tr>
<tr>
<td>Discuss/distribute office supplies, UVA directory, Charlottesville directory, name plate, etc.</td>
<td>☐</td>
</tr>
<tr>
<td>Tour office/department (restrooms, break room, introduce to internal/external staff, identification/access card, and/or appropriate keys)</td>
<td>☐</td>
</tr>
<tr>
<td>Discuss communication opportunities - staff meetings, department meetings, newsletters, etc.</td>
<td>☐</td>
</tr>
<tr>
<td>Provide brief history of department</td>
<td>☐</td>
</tr>
<tr>
<td>Provide departmental/university organizational charts</td>
<td>☐</td>
</tr>
</tbody>
</table>
### Departmental Orientation Checklist

**University of Virginia**


<table>
<thead>
<tr>
<th>1st Day/1st Week</th>
<th>Completed(√)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Section 2 of I-9 (online)</td>
<td></td>
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<tr>
<td>Brief discussion of employee’s role in department/University (also discuss department’s and University’s mission)</td>
<td></td>
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<tr>
<td>Provide up-to-date written position description (job duties/scope, essential/non-essential employees) and performance expectations</td>
<td></td>
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<tr>
<td>Discuss Performance Planning and Evaluation (Lead @) process (general overview)</td>
<td></td>
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<tr>
<td>Discuss recording leave (Self Service Time and Leave -SSTL)</td>
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<tr>
<td>Discuss/provide reference for leave policies</td>
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<tr>
<td>Discuss holiday schedule and process for requesting leave</td>
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<tr>
<td>Discuss lunch/break periods</td>
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<tr>
<td>Discuss training/educational opportunities/recommended reading</td>
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<tr>
<td>Discuss tuition waiver/reimbursement–other educational opportunities</td>
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<tr>
<td>Discuss UTS (University Transit Service) - have bus schedule available in department</td>
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<tr>
<td>Discuss safety and security/emergency conditions and response, such as:</td>
<td></td>
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<tr>
<td>a. Fire, disaster preparedness, emergency/ bomb threat procedures</td>
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<tr>
<td>b. Accident injury procedures</td>
<td></td>
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<tr>
<td>c. Emergency blue phones on Grounds (Dial 9+911)</td>
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<tr>
<td>d. Inclement weather policy</td>
<td></td>
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<tr>
<td>e. Universal precautions and HAZMAT (if applicable)</td>
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<tr>
<td>Discuss the Resource Fair</td>
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<tr>
<th>Approximately 3 Months From Hire Date</th>
<th>Completed(√)</th>
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</thead>
<tbody>
<tr>
<td>Consider conducting 3- Month Performance Evaluation (recommended)</td>
<td></td>
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<tr>
<td>Discuss professional development opportunities</td>
<td></td>
</tr>
<tr>
<td>Recommend attending Resource Fair with department representative (should occur within 6 months of hire)</td>
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### Department-Specific Requirements/Notes - to be customized by each department

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<tr>
<th>Department-Specific Requirements/Notes</th>
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**Completion of Checklist:** (Both new employee and departmental representative must sign below indicating checklist information has been completed in full).

**Employee:**

Signature

Date

**Department Representative:**

Signature

Date

**Updated 10-12-10**
Mentoring/Peer Socializing Programs
Mentoring

Policies and Guidelines

Approval

- Supervisor's approval is required for mentors to participate in the program.

Meetings

- Meetings should be arranged at a mutually convenient time for both mentee and mentor and with consideration to departmental or branch library responsibilities.
- Mentees should consult with their supervisors when arranging meetings.
- All meetings are on work time, but should not be scheduled outside of the participants' usual working hours.

Relationship between supervisors, mentors and mentees

- New employees will not be mentored by someone in their supervisory line.
- Mentors will not report to the new employee's supervisor about job performance or personal matters.
- Mentors are not responsible for negotiations between employees and supervisors.

Mentor commitment

- Mentors are expected to commit to the program for approximately 10 meetings with their mentee
- Each meeting lasts approximately one hour.
- Mentors are asked to have a positive and professional attitude.
- Mentors are asked to attend training sessions.

Referrals

- Mentors and mentees are given packets of materials and brochures. This would be a good place to start should the mentee need a referral for help.
- Any questions about unions should be referred to the appropriate union representative.
Mentoring

Responsibilities of Peer Mentoring

Recruiting and Training of Mentors

The Peer Mentoring Committee will hold an informational meeting whenever appropriate to present the idea of peer mentoring to staff and to solicit volunteers. The meeting will emphasize expected time commitment (time frame of 10 meetings, estimate of hours to be spent) and will address issues of attitude and professionalism. The fact that the program is open to anyone with the permission of his/her supervisor will be emphasized. Interested employees will be invited to attend a training session on the requirements of the program. The training sessions will include a discussion of the policies of the program, the matching process, and the available support and resources. Training sessions will be held as needed.

During the six to twelve month mentoring period both mentors and new staff are encouraged to contact the Mentoring Committee with suggestions or concerns. This is a dynamic program, and evaluation will be key to its success. An evaluation form will be given to participants at the end of the process.

Approximate time frame:

- 1st month - Recruitment meeting/training
- 3rd - 4th month - Mentor follow-up meeting
- 6th - 12th month - Evaluation

Reporting

- The Mentoring Committee reports to the Steering Committee, which oversees the effectiveness and progress of the program.
- The librarywide list shall be used to inform staff about the program and special events and to encourage participation.
- As a matter of policy, a mentor will not report to a new employee’s supervisor on the progress of the employee, nor should a supervisor inquire or expect such a report.

Communication

It is important for the success of the program that supervisors of mentees are consulted about the timing of the meetings between mentors and mentees. Mentors should encourage mentees to discuss possible times with their supervisors and to be sensitive to particularly busy times of the year. Everyone involved—the committee, the mentors and the mentees—should be sensitive to the time constraints on staff at the beginning of the semester and at other times indicated by the supervisors and mentees. Meetings can always be spread out or postponed during especially busy times.

The Mentoring Committee should remind supervisors that the Peer Mentoring program is an official program of the Library and that the meetings between mentors and mentees are to be considered work time.

Selection

Employees who have secured supervisory permission and demonstrate a commitment to the goals of the program will be selected to serve as mentors. The Mentoring Committee expects a high level of professionalism and positive attitude on the part of volunteers.
The Mentoring Committee will use judgment in matching new employees with those with experience. While same-department matching has some advantages, such matching also poses potential difficulties, and therefore will not be the preferred mode. Cross-departmental mentoring offers more potential for growth for both mentor and employee. No individual will be matched with someone in his or her supervisory line. To facilitate the process, the Mentoring Committee is willing to arrange the first meeting among mentor, new employee and new employee’s supervisor, if appropriate.

Matches will be monitored by the Mentoring Committee for any tension that might arise, and mentors and employees will be encouraged to report any discomfort with the process.
The University of Delaware Library Assembly of Professional Staff

Mentoring Program Guidelines and Procedures

Orientation Mentoring Relationship | Promotional Mentoring Relationship | Professional Mentoring Relationship | Mentoring Program Coordinator Responsibilities

Revision 2009

Background Information

The development of this program was recommended by the Steering Committee of the University of Delaware Library Assembly of Professional Staff (UDLAPS) in March of 1993, based on interest from the general membership of UDLAPS. The purpose of the program is to help provide professionals with peer counselors and role models to supplement the relationships within reporting lines. Furthermore, the purpose of the mentoring program is to enhance the professional atmosphere within the library, and to encourage all professionals to create and participate in career enrichment activities. The program is designed to provide mentoring opportunities to meet the diverse needs of the various professionals working in different areas of the University of Delaware Library.

These guidelines are meant to encourage participation in the program, providing activities to assist participants in meeting their goals. Participation in all types of relationships in the program is voluntary and may be ended by either party for any reason. Though professionals are encouraged to become involved as mentees and mentors, they are not required to use the program. It is hoped, however, that the benefits of mentoring will provide motivation to prospective participants, and that past successes of the program will stimulate continued involvement. Mentors serve in an advisory capacity only and the establishment of a mentoring relationship should not be seen as a guarantee of advancement or career success for either mentee or mentor.

Types of Mentoring

This program consists of three types of mentoring relationships, each addressing the needs of professionals at particular stages of their careers. There may be some overlap in the activities between each of the mentoring relationship types as best fits each individual situation. It is recognized that each mentoring relationship will be unique. In any type of mentoring relationship, the purpose of the program is to enhance the relationship between the individual and the Library, and to encourage all professionals to create and participate in career enrichment activities. The program is designed to provide mentoring opportunities to meet the diverse needs of the various professionals working in different areas of the University of Delaware Library.

Types of Mentoring

- **Orientation** - for new professionals or for professionals new to the Library. It includes general peer training and orientation to the Library, the University, and the local area. A checklist of recommended activities may be used for guidance. This type of relationship usually represents a short-term formal relationship with a recommended content, time limit, and specific goals.

- **Promotion** - for established librarian professionals with an interest in career advancement and promotion. This type of relationship allows for a focused range of activities and specific requirements for the participants while still allowing a large degree of freedom as to the activities and goals chosen.

- **Professional** - for professionals wishing to explore professional development activities, seek job enrichment, achieve the high skills needed for specialty or administrative positions, or to
change their career emphasis. This type can represent a special, highly personal and unstructured relationship that requires strong commitment, or it can be a somewhat formal relationship of more limited duration with activities chosen by the participants in consultation with the Mentoring Program Coordinator.

**Orientation Relationship Goals**

- Acquaint newcomers with University of Delaware Library staff structure, future planning visions, mission, etc.
- Act as a sounding board for questions related to the organizational structure of the Library and the University.
- Facilitate interaction with colleagues beyond supervisor and immediate department; encourage cross-departmental and cross-divisional communication.
- Introduce new professionals to career-related activities.
- Discuss professional committees, organizations, and scholarly activities, as well as introduce the professional to local and regional groups such as the Delaware Library Association.
- Welcome new professionals to the geographic area.

**Criteria for Mentors**

- Interested professionals may volunteer to serve as mentors; it is recommended that the volunteers have two or more years of experience at the Library.
- Volunteers should be knowledgeable of the Library and University, flexible, considerate, cognizant of the needs of new professionals, and committed to meeting the steps and calendar of the checklist.
- Mentors may be within the same reporting line, but outside the supervisory relationship.

**Mentors**

- Communicate with the mentee about calendar and checklist.
- Follow checklist to provide orientation and answer additional questions from the mentee.
- Recommend arrangement of at least monthly contacts with mentee for a six-month period.
- Solicit feedback from the mentee and report progress to the Mentoring Coordinator.

**Mentees**

- Determine meeting schedule and orientation needs.
- Be open to the program, ask questions, and keep appointments with mentor.
- Participate in appropriate checklist activities.
- Provide feedback to the mentor and submit completed evaluation form to the Mentoring Coordinator.

**Possible Activities**

- See checklist for suggested activities.

**Promotional Relationship**

This relationship is geared specifically toward the librarian promotional process.

**Goals**

- Provide assistance in dossier preparation and use of the promotion process to early-to-mid-career librarians.
- Assist librarians in building a record of professional activity by acting as a source for networking and answering questions about aspects of the professional career that fall outside job duties.

**Criteria for Mentors**

- Mentors must have been promoted and/or have served on the promotion committee.
- Mentors should be at the same level of responsibility or above that of the mentee, but should not be in the same direct reporting line.

**Mentors**

Formulate, with input from the mentee, a program and schedule tailored to the needs of the
mentee. Activities may include any or all of the following:

- assist individual mentees in identifying professional development activities such as conferences, committees, publishing opportunities;
- introduce mentees to appropriate colleagues, committee chairs, etc., outside of the Library. Inform mentee of appropriate volunteer opportunities;
- provide assistance in preparation and critique of mentee’s dossier, and answer questions about promotion process;
- assist mentee in locating resources for service or research activities related to promotion;
- encourage mentees to attend appropriate UDLAPS programs, including the Dossier Preparation Workshop and other professional development programs; and
- solicit feedback from the mentee and report progress to the Mentoring Coordinator.

**Mentees**

- Mentors will not be held responsible for the outcome of any personnel actions involving advancement, promotion, or continuing appointment of their mentees.
- Establish contact with the chosen mentor; formulate a program and schedule tailored to the mentee’s needs. Modify the program if and when needs change.
- Be prepared to ask specific questions about professional activity, career, and promotion criteria.
- Use mentor to help focus career activities in appropriate ways. Pursue committee opportunities and networking activities suggested by the mentor and participate in any other activities that would be appropriate.
- Provide feedback to the mentor and submit completed evaluation form to the Mentoring Coordinator.

Activities chosen by participants may include the following:

- dossier preparation assistance;
- introduction to Library and professional committees;
- introduction to leaders in regional and local organizations;
- assistance with figuring out "the system" in the Library: who knows what, who has expertise, etc.;
- assistance with research, writing, and publishing; and
- assistance in selection of courses, degree-work, etc.
- dossier preparation workshop; and
- publishing and writing workshops.

**Professional Relationship**

Characterized as the least structured mentoring relationship with a duration determined by mentor and mentee.

**Goals**

- Help professionals enrich their careers and find opportunities to focus within their chosen specialty, or to break out into new areas.
- Help mid- and upper-level professionals to change direction; diversify their skills and duties; or develop management, specialty, or administrative skills.
- Provide a means for upper-level management to pass on the benefits of their experience to newly-emerging managers.

**Criteria for Mentors**

- Mentors can be drawn from any level.
- Mentors should be skilled in their job responsibilities, and/or active professionally, and/or be considered an expert in their field.
- Mentors can be either in the same reporting line or in a different division, but should not be the direct supervisor of the mentee.

**Mentors**

- Formulate goals with the mentee; help the mentee develop his/her career in desired ways.
- Mentors may plan formal activities, depending on the goals of the mentee.

**Mentees**

- Establish contact with the chosen mentor and formulate goals.
- Participate in activities appropriate to the growth of both mentee and mentor.
- Provide feedback to the mentor and the Mentoring Coordinator.

Activities are only limited by that which is appropriate in a work or professional relationship. They may include:

- regular meetings;
- assistance in furthering involvement in professional organizations, particularly at the national level;
- assistance with publication; and
- referral to prospective mentors outside the Library or University, who may have more appropriate expertise.

Mentoring Program Coordinator

The Mentoring Program Coordinator is responsible for the successful administration of the mentoring program and for maintaining required records and archives. The Coordinator is an elected officer of UDLAPS nominated by the UDLAPS Nominations and Elections Committee and elected by the full membership every other year in regular UDLAPS elections. The responsibility of the Mentoring Program Coordinator, according to the UDLAPS Constitution, is to "coordinate the activities of the Mentoring Program in accordance with the UDLAPS Mentoring Program Guidelines and Procedures." The Coordinator plays a large part in helping to establish mentoring relationships and in evaluating the effectiveness of the program. Specific duties of the Coordinator related to administering the mentoring program are:

- publicize and promote the program and recruit participants;
- achieve representation of mentor volunteers from a variety of Library departments and divisions by encouraging interested professionals to participate as mentors as appropriate;
- maintain list of mentors;
- attend professional candidates’ interviews/breaks in order to explain the UDLAPS Mentoring Program;
- attend the Dossier Preparation Workshop to describe the benefits of a mentoring relationship;
- write e-mails of introduction to new professionals advising that contact will be made shortly after their arrival;
- match mentees with mentors;
- present program goals and guidelines to mentors for added assistance;
- in cooperation with the Assistant Director for Library Administrative Services, plans and revises the checklist for all new professional orientations;
- resolve problems for/between mentors and mentees;
- assist participants in formulating goals and developing activities;
- solicit informal feedback from participants on progress and effectiveness of each relationship and/or the program as a whole;
- and review and evaluate the program and identify problems.

Specific duties of the Coordinator related to the UDLAPS organization are:

- coordinate with UDLAPS Steering Committee and appropriate groups to plan programs related to promotion and to encourage attendance by mentors/mentees;
- attend the UDLAPS Steering Committee meetings and UDLAPS Business meetings regularly as an elected member;
- report the general successes and needs of the program to the UDLAPS Steering Committee regularly and, periodically, to the entire UDLAPS membership;
- maintain archives of program documentation;
- maintain informal list of mentoring relationships established (all personal notes or e-mail about relationships are considered confidential and must be shredded/deleted after the Coordinator’s term ends);
- maintain and report basic statistics of number and type of mentor/mentee matches, their duration, and indication of general success of the program;
- recommend necessary changes to the Mentoring Program and Guidelines to the UDLAPS Steering Committee;
- and provide an overall report to the new Mentoring Program Coordinator and/or UDLAPS Steering Committee at the end of the Mentoring Coordinator’s term to maintain continuity and an archive.

If the Mentoring Coordinator feels that revisions/changes need to be made in the Mentoring Program Guidelines and Procedures:

- a revision committee is appointed by the Mentoring Coordinator and is comprised of
the Mentoring Coordinator, at least one member of a previous revision committee, and other interested UDLAPS members;

- a draft of the revisions should be sent to the UDLAPS Steering Committee;
- the final proposed revision and the current version of the document should be presented to membership of UDLAPS for their consideration;
- and the UDLAPS Membership will vote on proposed changes by secret ballot.
UMASS AMHERST UNIVERSITY LIBRARIES
LIBRARIAN MENTORING PROGRAM

- Goals
- How the Program Works
- Applications
- Guidelines
- Tips for Mentors
- Tips for Mentees
- Suggested Activities
- Articles
- Books
- Why Mentoring Matters
- Program History
- Contact Information

start.txt · Last modified: 2010/08/10 11:53 by bmorgan
Guidelines and Suggestions for Socializers (Peer Librarians)

A ‘socializer’ is an informal peer librarian who has agreed to assist a new librarian in relocating and making the transition into the UO Libraries. The idea is that the former new librarian will now be a sort of informal mentor to the new librarian, using his/her own recent experiences as a gauge to assist the new librarian with whatever he/she needs in that first month or so. These needs may be as simple as a reassuring e-mail, meeting for coffee in the first few weeks of employment, introducing the new librarian to other employees or friends outside the library, making arrangements to attend a mutual meeting together, talking about moving company experiences, and so on.

Suggestions of what the new librarian may be interested in:

- New librarians who are relocating (particularly from cross-country) are typically most interested in finding a place to live. They are sent a new faculty packet that includes some information about apartments, rentals, real estate, and local utilities, however, you might be able to help them analyze neighborhoods and commutes to the UO, bike paths, locations for local stores, etc. Laine refers them to this site, which contains many useful resources on places to start looking: http://libweb.uoregon.edu/admnpers/staff/Faculty/new/housing.html.
- In reference to the above, you may be able to help the new librarian better determine which rentals may accept pets or where child care is available, which are also major concerns.
- Find out if the new librarian will be arriving in town before finding a place to rent/buy, and if so, does he/she need a place to stay for a few days? See Laine if help is needed making arrangements. Once in a while, we can find house sitting arrangements, which can work out well for everyone.
- What hobbies does the new librarian have that might correspond to you or someone you know? Can you or that person point out opportunities for involvement or where to find supplies for that hobby?
- Is the new librarian nervous about his/her first day of work? What activity that you both enjoy (such as bike riding, hiking, seeing a movie, etc.) might help take his/her mind off those first day jitters?
- Arrange to take the new librarian to Valley River or Gateway Mall or Saturday Market to see what’s available, including movie theatres, restaurants in the area, and so on. If you have a favorite place to shop or eat, share that with him/her.
- Some of what the new librarian may be interested in will have to do with organizational culture. Which meetings to attend? Who’s who? How do most of us correspond, and should they be worried when a person does not get back to them (i.e. some folks are better at using the phone rather than responding to e-mail quickly).
- Make sure he/she knows where the staff lounge and break area is.
- Make sure he/she knows about the Library Staff Association, another great way to meet other people from around the library.
• Make sure he/she knows how to navigate Iris and find directories and organization charts that may be of particular use the first few months.
• Invite the new librarian and another friend or coworker to lunch. Listen to what’s on that person’s mind to see how he/she is acclimating to the workplace. Is there something else we can do to help that situation?
• Contact Laine to organize an informal brown bag or Friday Forum on a common theme for other new librarians. This can help build a natural cohort with mutual interests and concerns.
• Organize a monthly night out with that group of new librarians to try different restaurants in Eugene and chat about your experiences.

Things to Keep in Mind:

• If for some reason you and your new librarian do not hit it off, feel free to check back with Laine to see if she can find someone else. There’s no failure here. People simply have different interests and personalities, and chances are we can find another good match with someone else. No pressure! This should be fun for both of you.
• Check in semi-regularly (once a week or so) with that new person for their first few months or so. Just see how he/she is doing and if any questions come up. Be there to listen and help him/her learn about us as an organization. The goal is that no one should feel isolated.
• Sometimes the best thing you can be is a sounding board for frustrations while the new person is learning the system. If there’s something you think Laine or Library Administration needs to know about, please feel free to share. We are all learning from these experiences, and want each person to start out in a positive and confident manner, feeling they have a supportive environment in which to grow and succeed.
• Some new librarians may require or prefer more assistance than others. Just go with the flow and be prepared. If they don’t want your assistance, that’s okay, too.
• If you try a particular activity, let Laine know, and she will add it to her list of suggestions!

*Most important of all: have fun!*

June 29, 2007
Syracuse University

SUL Mentoring Program: Home

http://researchguides.library.syr.edu/mentoring

About the Program

The Library’s Mentoring Program is intended to provide librarians with guidance and assistance relative to the Library’s promotion process and professional service and related activities. While librarians receive direction and support through the annual performance evaluation process and other interactions with managers and administrators, they also may wish to avail themselves of the expertise and experience of their colleagues. The Program is a voluntary, multifaceted team-based program that allows for both group and individual mentoring.

Who is the Program for?

- Librarians new to SUL
- Librarians coming up for promotion
- Librarians seeking professional development advice and opportunities

How does it work?

The Mentoring Team brings together mentees and mentors based on areas of need and other factors. They will then meet to discuss the need and independently determine meeting frequency. In some cases especially if multiple requests for the same need are expressed, group meetings may be suggested.

The Mentoring Program is not designed to mediate in supervisory or other personnel related issues, nor can it answer questions related to the Librarian's Manual. It goes without saying that all requests will be treated with the utmost confidentiality.

To become a Mentor or to seek one, click on the appropriate tab above.

What will it accomplish?

- Facilitate the building of collegial relationships between librarians.
- Provide guidance in the promotion process.
- Provide guidance in professional development activities such as presentations, publications, and service to member organizations.

Contact the Team

- Jenna Mayotte, 3-9524
- Marty Hanson, 3-1947
- Fantasia Thorne, 3-9515
- Nancy Turner, 3-2237
- Peter Verheyen 3-9756

About the Mentoring Team:

The Mentoring Team consists of a small subgroup of volunteer mentors that manages the program under the broad oversight of the Associate Deans. The Mentoring Team connects Mentees and Mentors, sets meeting schedules and coordinates events (e.g., workshops, etc.), communicates with all librarians about Mentoring Program activities, and serves as a liaison between the mentoring team and the Associate Deans.

As with many new things, terms of appointment remain to be determined and we welcome your input into what will become a democratic peer-managed process.
Volunteer!

To volunteer to become a mentor, click here to enter your information in the form.

About Mentoring

What is a mentor?
A mentor is a trusted and experienced advisor. The relationship between the mentor and mentee is unique. The mentor may assume one or several roles, while contributing to a sustaining relationship of shared interests and goals. A mentor makes a commitment to an assigned mentee to help her or him grow within organization as well as the profession.

A person can never have too many mentors. As a professional librarian, you might have several formal and informal mentors at the same time.

Who can be a mentor?
Any librarian can serve as a mentor – remember we all have valuable experiences to share that are not always related to rank.

Benefits of participating in the program for a mentor:

- Contribution to the professional development of new colleagues
- Gain increased respect and recognition from others in the University as a professional with ability to encourage and promote other colleagues
- Extend one's own organizational and professional network
- Experience professional and personal growth and renewal
- Use or develop additional skills not required in current position
- Stay sharp and creative

Qualities of a good mentor:

- Willing to share knowledge
- Committed to the mentoring process
- Considered a role model in his/her position or area
- Encourages and motivates others
- Creates a continuous learning environment
- Possesses good interpersonal communication skills
- Commits time to be a mentor
- Maintains confidentiality

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As with many new things, terms of appointment remain to be determined and we welcome your input into what will become a democratic peer-managed process.
Syracuse University Library has a strong interest in seeing that each librarian realizes his/her full potential. We want to support and advance all librarians, both in his/her own interest as well as in the Library community.

Although all librarians have responsibility for their own growth and success, having a mentor offers an avenue to become acclimated more quickly to the SUL environment. The effectiveness of having a mentoring relationship depends on the active participation of the mentee as well as the mentor.

**Benefits for a librarian in having a mentor:**
- Expand your view of the Library and University
- Increase awareness about other areas of the Library
- Understand how to build a network within the University community and the profession
- Expand growth in your sense of competence, identity, and effectiveness as a professional
- Provide an outlet to discuss concerns
- Receive honest and informal feedback
- Receive advice on how to balance your work life
- Obtain knowledge of skills for showcasing one's own work
- Provide a perspective on long-term career planning

**Mentee responsibilities:**
- Meet regularly with the mentor
- Maintain confidentiality
- Keep yourself informed in regard to the requirements for tenure and promotion and your progress toward meeting these requirements
- Ask for and give feedback
- Follow through on referrals from mentor to appropriate office for specific information
- Listen actively
- Ask your mentor for guidance and assistance whenever it is needed
- Present needs in an articulate way

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As with many new things, terms of appointment remain to be determined and we welcome your input into what will become a democratic peer-managed process.
Syracuse University Library Mentoring Program - Mentee Information Survey

Please answer all questions. Thank you!

1. Date

2. Contact Information
   Name: 
   Department: 
   E-mail Address: 
   Phone Number: 

3. What is your current position at the Library?

4. How many years have you worked at SUL?

5. How many years have you been in the profession?

6. I would like to be paired with a mentor who can (check all that apply):
   - [ ] provide informal introduction to SUL
   - [ ] provide publishing and presentation advice
   - [ ] help me network in the library
   - [ ] help me network in the profession
   - [ ] provide career progression or promotion advice
   - [ ] Other (please specify) 

7. My mentee goals are:

8. Is there anything else that might help us match you successfully with a mentor?
Program Evaluation
Mentoring Program Evaluation

The Mentoring Committee would like feedback about the Peer Mentoring program from both mentors and mentees. The Committee is interested in your evaluation at any point during this process. Please send your completed questionnaire via email if possible, or on paper, to Phyllis Payne (pcpayne@bu.edu) after you’ve finished meeting as mentor and mentee. We will consider all suggestions for improvements; please limit your responses to comments about the mentoring process.

For Mentees:

- Has the Peer Mentoring Program helped with your transition to working at the Boston University Libraries? Please elaborate.

- What activities, explanations or introductions would you add and/or delete and why?

- Do you have a good beginning sense of how the Library and the University function? How did the Peer Mentoring program contribute to this understanding?

- How did you learn about instructional opportunities at BU?

- Do you understand the opportunities that BU offers for meetings, conferences and workshops for continuing education?

- Did you find the Peer Mentoring Checklist useful? Please elaborate.

- How has your participation in this program affected your relationships with other library staff members?

- How often did you meet with your mentor in person, by phone and/or by email? Was the number of meeting times sufficient? Was the method of communication effective? If not, what would work better?

- What other comments would you like to make?

For Mentors:

- How do you think that the Peer Mentoring Program helped your mentee with his/her transition to working at BU?

- What activities, explanations or introductions would you add and/or delete and why?
- What did you learn about BU or the Library that you didn’t know before?

- Did you find the Peer Mentoring Checklist useful? Please elaborate.

- How often did you meet with your mentee in person, by phone and/or by email? Was this effective? If not, what would work better? Did you find it difficult to meet with the mentee four times a month?

- How would you evaluate your mentoring training?

- What other comments do you have?
Thank you for participating in Module 1, *Introduction to the UCI Libraries: Developing & Sharing Knowledge*. To assist in providing a quality orientation program, please take a few minutes to complete this evaluation. All responses are confidential and anonymous.

Date of Session:____________________

Please select the response that best describes your experience.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The session format was effective.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2. The length of the program was adequate.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3. The session provided me with a basic understanding of the UCI Libraries guiding documents.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4. The session provided me with a basic understanding of the UCI Libraries Organizational Priorities.</td>
<td></td>
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</tr>
<tr>
<td>5. The material covered was easy to understand.</td>
<td></td>
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<tr>
<td>6. The information shared is useful to me as a new employee.</td>
<td></td>
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<tr>
<td>7. This program was effective at making me feel welcome to the organization.</td>
<td></td>
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</tr>
</tbody>
</table>

8. What is your overall evaluation of the orientation? Excellent Very good Good Fair Poor

9. What aspects of Module 1 were most useful?
10. What improvements or changes would you suggest?
11. What questions do you have about the information presented that did not occur to you at the time? OR what did you like most? What did you like least?
12. Please share any additional comments or feedback about the orientation session.
Recruitment and Orientation Survey

Introduction

Please take a few moments to evaluate your hiring and orientation experience. Your input will help us to improve the effectiveness of NARA’s hiring and orientation processes.

Recruitment

1. Your Name (Optional): 

2. Title/Series/Grade (Optional): 

3. Orientation Date: 

4. How did you learn about this position? Please check one:
   - USAJobs website
   - Professional organization
   - NARA website
   - NARA Human Resources Office
   - Federal, State, or Local employment office/Job Information Center
   - Newspaper or other print publication service
   - Mailing to your organization or school
   - Private Employment Office/Information Service
   - Job Fair or Recruitment Visit to your organization or school
   - Word of mouth
   - School or college counselor or other official
   - Other (please specify) 

5. Are you on a student appointment?
   - Yes
   - No

6. How did you apply for your job?
   - Mail
   - Hand delivery
   - Online through USAJobs
   - Combination
**Recruitment and Orientation Survey**

**7. Please indicate your satisfaction with the following aspects of your HIRING experience:**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>NARA's Career Website (<a href="http://www.archives.gov/careers">www.archives.gov/careers</a>)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interaction with NARA through a career event</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NARA's marketing materials (brochures, booklets, etc)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacancy announcements (user friendliness, clarity, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application process (timeliness, efficiency, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication and interaction with NARA human resources staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall, how satisfied were you with your RECRUITMENT/HIRING experience</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Orientation**

For this part of the survey, we are interested in your orientation experience.

**8. Where was your orientation conducted?**

- DC/Metro area
- Any location outside of the DC/Metro area
- Not applicable. I did not receive an orientation.

**9. Please indicate your satisfaction with the following aspects of the HUMAN RESOURCES SESSION (welcome, introduction, benefits, etc):**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Length of the session</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledgeable Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**10. Please indicate your satisfaction with the following aspects of your SECURITY/BADGING PROCESS:**

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeliness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledgeable Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Recruitment and Orientation Survey

11. Please indicate your satisfaction with the following aspects of the FACILITY TOUR:

<table>
<thead>
<tr>
<th>Content</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of the tour</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledgeable Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

12. Please indicate your satisfaction with the following aspects of the PHONE AND COMPUTER TRAINING:

<table>
<thead>
<tr>
<th>Content</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Length of the training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledgeable Personnel</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. How satisfied were you with the following aspects of the pre-employment mailing/forms package that you received?

<table>
<thead>
<tr>
<th>Timeliness of receiving the package</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content of the package</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

14. How satisfied were you with these orientation items?

<table>
<thead>
<tr>
<th>Orientation Binder</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
<th>Did Not Receive or N/A</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits Videos</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcome Videos</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intro to NARA On-line Course</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

15. Overall, how satisfied were you with the orientation process?

<table>
<thead>
<tr>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
<th>Very Dissatisfied</th>
</tr>
</thead>
</table>

16. If you were Dissatisfied or Very Dissatisfied with any part of the ORIENTATION AND/OR RECRUITMENT PROCESS, please explain:


17. Additional Comments: Please share any positive or negative experience that stood out in your mind with regards to the orientation process:


Thank you
New Faculty Orientation (Part Four)  

Employee Name:  

SUPervisor: Part Four is optional. If completed, the employee will submit this form. 

Employee: Optional. If completed, submit this sheet separately to Fran Wilkinson (see below)  

Improving the New Employee Orientation Process  

Please provide any feedback for improving this process for future new employees. Although your suggestions and comments will be held as confidential, you are welcome to make an appointment with Fran Wilkinson, Deputy Dean, to discuss your experiences more directly. Just check the box below.  

[ ] I would like to meet with Fran Wilkinson to discuss this process  

Please make the following improvements to the UL’s New Employee Orientation program:  

Add  

__________________________________________________________________________  

__________________________________________________________________________  

__________________________________________________________________________  

__________________________________________________________________________  

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Expand  

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Comments  

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SUBMIT COMPLETED FORM TO: Fran Wilkinson, Deputy Dean, Zimmerman 218
# New Staff Orientation Evaluation

Please complete this form and either drop off at the Personnel Services office or email to Laura Blessing at laura_blessing@ncsu.edu.

**Date:** __/__/____  
**Name:** ___________________________  
*(optional)*

<table>
<thead>
<tr>
<th>I have a better understanding of how my work relates to work done in other departments or units.</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>No Opinion</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am more confident that I can find my way around the D.H. Hill building.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I am more comfortable approaching staff in other departments with questions or to ask for help.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I can explain the Libraries’ vision statement in my own words.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I can think of examples of projects, ideas, or activities that are consistent with the Libraries’ mission and vision.</td>
<td></td>
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</tr>
<tr>
<td>I can think of ways that the Libraries promotes and values diversity among staff and users.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I know who to contact to raise a concern related to diversity issues or make a suggestion for diversity programming.</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>I believe that I know what computing tools and resources are available to me as a Libraries staff member.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I know how and when to contact the IT Helpdesk.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Did you feel that the Orientation program met its objectives?**

In what ways do you feel better prepared to be more productive and work collaboratively in the Libraries?

---

**Over ------------**
What did you like most about Orientation?

What did you like least about Orientation?

Did you find the Orientation comfortable?

Do you have any suggestions for making the Orientation a better experience?
Professional/Staff Development Resources
UCLA Library

Curricular Framework for the Learning & Development Program

The UCLA Library seeks to foster an atmosphere of involvement, commitment, creativity, innovation, challenge and fun across the organization. The Library is committed to creating a culture of trust and mutual respect, providing equal opportunity and fair treatment, and fostering an environment of open communication that appreciates differences and emphasizes personal accountability.

The UCLA Library’s Learning & Development Program is managed by Library Human Resources and is organized around a cohesive curricular framework that provides a flexible mechanism for planning.

Statement of Philosophy and Purpose

The ongoing professional development of each and every academic and staff employee is a crucial and integral part of the Library’s strategic plan and priorities. Access to learning opportunities is open to all Library employees. Participation in learning and development activities:

- improves effectiveness in the employee’s current job;
- enhances career opportunities within the UCLA Library, UCLA, and the University of California; and/or
- increases professional knowledge, skills, and abilities.

The UCLA Library invests in individuals and the organization by providing opportunities for learning and professional growth for all employees and the organization as a whole.

Professional development is defined as growth in an individual’s knowledge, skills, and abilities that leads to enhanced effectiveness and increased efficiency. The employee and the supervisor are jointly responsible for professional development. Employees are expected to share in the responsibility for their own learning, professional development, and continuing education. Supervisors are expected to coach, counsel, and mentor employees and to suggest professional development and continuing education opportunities to individual employees.

Professional development and continuing education activities should be planned and annual learning goals should be established at the same time that unit and individual work plans are developed. Annual individual work plans should be developed with the intent to acquire and improve new knowledge and skills, to increase an individual’s ability to assume greater responsibility, and to prepare for future career opportunities.
As employees prepare individual work plans and outline professional development goals, they are encouraged to:

- Evaluate their own effectiveness;
- Assess their learning needs;
- Make plans to improve their knowledge base and skill set; and
- Improve their performance.

Managers are expected to encourage and be supportive of employee development by:

- Providing honest and helpful feedback on performance;
- Encouraging employees to learn and grow throughout their careers, and to pursue appropriate career goals;
- Offering or supporting education and learning opportunities to the extent possible to enhance an individual’s performance and capacity, which may go beyond their current position; and
- Publicizing job opportunities so that individual employees can pursue positions which they see as advancing their own development.

Progress in meeting these goals should be evaluated on a regular basis – through the peer review process for academic employees and through the annual performance evaluation process for staff employees.

The UCLA Library’s Learning & Development Program is dedicated to serving library employees by providing opportunities to acquire a wide variety of knowledge, skills, abilities and competencies to enhance professional practice throughout the library system in all levels and types of jobs.

Rapid advances in technology, changes in user expectations of service, transformations in the ways that academic users seek information, and expanding roles for library employees at all levels require investment in the Library’s talented and agile employees, helping them to be continual and strategic learners.

The Learning and Development Program seeks to provide opportunities for Library employees to share with one another what they learn about trends in research and scholarly communication, interests of UCLA faculty and students, and the results of experiments – whether successful or not – in providing new and better service to the Library’s primary clientele.

**Curricular Framework and Tracks**

The UCLA Library’s Learning & Development Program is managed by Library Human Resources and is organized around a cohesive curricular framework that provides a flexible mechanism for planning.

Learning & Development opportunities span activities such as orientation, continuous learning through formal and informal training, mentoring, and coaching. Within the curricular framework are specific tracks which cover a broad range of knowledge, skills, and abilities for all levels of staff.
For each track, the Library may provide release time, funding, and/or and support for learning opportunities at the UC system level, UCLA campus level, and the library level as well as for external opportunities and offerings. Interactive offerings such as journal clubs and book discussion groups may be a part of any track. Departmental offerings tend to be job-specific and may not be open to all Library employees. Departments and managers develop their own internal training and documentation.

Within each of the twelve tracks, there are five types of offerings:
- system level offerings;
- campus level offerings;
- library offerings;
- departmental offerings; and
- external offerings.

Note: Courses and other offerings may appear under more than one track.

Curricular Tracks

- **Orienting Employees (Orientation)**
  This track is designed to help new employees adjust to the Library and the campus environment, and succeed in performing their duties and responsibilities. At the campus level, a general orientation is offered. The Library’s New Employee Orientation Program complements with offering. At the departmental level, orientation is tailored to the learning needs of new employees, and to their specific job duties.

- **Appreciating Differences (Diversity)**
  Courses in this track are focused on diversity-related issues and are aimed at fostering harmony and enhancing group effectiveness by encouraging appreciation of and sensitivity toward all individuals.

- **Ensuring Health and Safety (Health, Safety and Wellness)**
  This track is focused on workplace health and safety and individual wellness. Offerings are varied and include courses and programs on health, well-being. The workplace environment and ergonomics are topics covered in this track.

- **Developing Professional and Interpersonal Effectiveness**
  Offerings in this track aim to increase the employee’s professional effectiveness on an individual level and within teams. Courses address development in planning and organizing, self-assessment and self-understanding, and individual skill-building.

- **Building and Maintaining Professional Knowledge & Expertise**
This track provides offering related to librarianship and academic librarianship and offers staff at all levels an opportunity to increase and maintain their professional knowledge.

- **Providing Service (Customer Service)**

  The quality of service we provide to library users, both internal and external, affects our efficiency, our working relationships and overall productivity. Courses in this track provide a foundation in public service philosophy and essential skills. The ideas and concepts apply to the relationships among individual employees and University departments.

- **Building Collections (Collection Management)**

  Development and management of collections represents one of the most important priorities of the UCLA Library and involves multiple levels of staff. Offerings in this track focus on enhancing staff knowledge and awareness of collections, particularly specialized collections, and on developing skills of individuals to efficiently and effectively manage our collections.

- **Harnessing Technology (Information Technology)**

  These courses provide training in the use of computer applications at basic and more advanced levels that help employees use technology effectively and increase their productivity.

- **Stewarding Fiscal Resources (Business Processes & Accountability)**

  Courses in this track prepare managers to handle University resources responsibly and increase awareness of the need for accountability.

- **Seeking Support (Fundraising, Development & Grantsmanship)**

  This track focuses on development of knowledge, skills, and abilities related to fundraising and development and grantsmanship (writing and managing grants).

- **Managing Human Resources (Supervisory Development)**

  The purpose of this track is to help current and prospective supervisors to develop an understanding of theories and concepts of supervision and human resource management as well as practical skills in managing people.

- **Becoming a Leader (Leadership Development)**

  The intent of courses in this track is to prepare employees for leadership roles at many levels within the Library and UCLA campus, and deepen their competencies as leaders and managers.
Issuing Officers

Pat Hawthorne, Director of Library Human Resources; Jenifer Abramson, Assistant Director of Library Human Resources

Responsible Department

Library Human Resources

Approval

Approved by Library Cabinet – November 2007

Review Cycle

This document will be reviewed initially in May 2008. Thereafter, its provisions and relevance will be reviewed annually.
Training and Development

Libraries' Staff Training & Enrichment Program [S.T.E.P.]

The Libraries' Human Resources Department has responsibility for coordinating training and enrichment for the organization. In that role, the HR staff will work with various groups/committees, such as the Department Heads Group, Libraries Staff Association, Professional Development and Research Committee, and individual departments or groups with special training needs.

S.T.E.P. Mission:

To facilitate a program that enhances organizational effectiveness while promoting individual career objectives.

S.T.E.P. Objectives:

- Create a continuous learning environment
- Develop core knowledge and skills
- Stimulate communication
- Address professional issues
- Improve morale and contributes to retention
- Foster commitment to the organization
- Prepare staff for future challenges in the workplace

Professional Development and Research Committee (PDRC)

The Libraries' Professional Development and Research Committee (PDRC) is charged with fostering professional growth of the Libraries' faculty through developing and promoting continuing education activities, encouraging and facilitating participation in local, state, regional, and national organizations; and promoting research interests and activities of the Libraries Faculty. To accomplish these goals, PDRC sponsors programs of interest to the Libraries' faculty and periodically schedules professional forums, discussions and workshops. PDRC also administers the Libraries' mentoring program. To learn more about PDRC current programs, please visit: [http://www.libs.uga.edu/profdev/](http://www.libs.uga.edu/profdev/).

Libraries' Faculty Independent Professional Activities Policy

Libraries' faculty are encouraged to engage in independent professional activities in addition to their assigned job responsibilities when the activities increase their professional competence and advance the Libraries' mission. Every faculty member may use up to five hours per week to pursue independent professional activities. Such release time is considered part of the faculty member's work week and does not require supervisors' permission. Accumulating and using release time beyond five hours per week requires supervisors' permission since it may affect the operation of the faculty member's department. The procedures for taking advantage of this faculty benefit can be viewed at: [http://www.libs.uga.edu/staff/independentprof.html](http://www.libs.uga.edu/staff/independentprof.html).
UGA Training & Development Center

The UGA Human Resources' Training & Development Center provides a variety of classroom and e-learning courses. Most courses are free, but some do have a nominal fee. Please visit their web page for more information.

Element K

The University of Georgia has been offering online learning via Element K, a leading provider of online learning solutions, since September 2003. Element K's online training modules offer you the flexibility to learn about various elementary to advanced topics at your own pace. Element K's modules are free to all UGA faculty, staff and students. To learn more about Element K, please visit: http://eits.uga.edu/elementk/.

Attendance at Library-Sponsored and University Sponsored Academic Events

Library-Sponsored Events (excluding training):

Employees are encouraged to attend library-sponsored events. Support of these events promotes job satisfaction, increases the sense of community among employees and encourages potential donors and others to look at the libraries in a positive light.

Employees may attend library-sponsored events during their normal work hours without taking annual leave or making up hours. Attendance must be mutually acceptable to employees and their immediate supervisor.

If all members of a unit wish to attend the same event, then priority will be at the supervisor's discretion.

University-Sponsored Academic Events (excluding training):

Employees may attend up to 5 university-sponsored events per semester (Fall, Spring and Summer), taking place during their normal work hours, without taking annual leave or making up hours. Attendance must be mutually acceptable to employees and their immediate supervisor.

If all members of a unit wish to attend the same event, then priority will be at the supervisor's discretion.

For further information about training and development resources or to suggest a training event, contact Jan Hudson at libjobs@uga.edu.
Who You Are

New Employee
- New Employee Checklist

Graduate Assistant
- New Employee Checklist--Graduate Assistant Supplement
- Continuing Education Opportunities
- Fall 2010 Orientation Schedule
- Training Manual

Librarian
- New Employee Checklist--Faculty Supplement
- Supervisor or Unit Head
- Tenured
- Untenured

Staff
- New Employee Checklist--Civil Service Employee Supplement
- Policy regarding time for taking courses in the University

Student
- New Employee Checklist--Student Assistant Supplement
- Illinois Compass Online Training (coming Fall 2010!)

For comments on this page contact: Staff Development & Training
Last modified by: Carrie Pirmann on 8/12/10
Staff Development and Training Advisory Committee

Charge

The University of Illinois Library has a responsibility to inform and train staff so they are prepared to serve the library community knowledgeably and effectively in a period of rapid technological change and organizational transition. The Library provides training, development, and enrichment opportunities; consulting services; and access to relevant training information in a variety of formats and levels.

The Staff Development and Training Advisory Committee advises the Library administration and the Staff Development and Training Coordinator on the planning, coordination, and evaluation of the Staff Development and Training Program. The committee makes recommendations for the establishment of competencies and standards, identifies training needs of library staff, prioritizes those needs, and makes recommendations about how to go about meeting those needs. The committee participates in planning policy and decision-making efforts regarding the offering of these programs. The committee reviews and makes recommendations regarding the creation, implementation and ongoing provision of a New Employee Orientation program. The committee helps to identify, recruit, train, develop, evaluate, and maintain a pool of staff trainers, resource personnel, and facilitators. The committee shares in accountability for performance of the training program and evaluates the performance of the training program.

Composition

The Committee is chaired by the Staff Development and Training Coordinator. Committee members are appointed by the University Librarian, with the advice of the Executive Committee. The Committee normally will be composed of nine members serving two-year staggered terms, and may be reappointed for repeated terms.

Membership

Beth Woodard, chair

*Susan Braxton (08/15/12)
Paula Carns (08/15/11)
*Camilla Fulton (08/15/12)
Gail Hueting (08/15/11)
*Kate Swan (08/15/12)
Barb Trumpinski-Roberts (08/15/12)
*Sandy Wolf (08/15/11)
Lisa Hinchliffe, ex officio
Cindy Kelly, ex officio
Helen Zhou, ex officio

*second term
### Books and Articles


