Train the Trainer

Sreedevi Satyavolu
Bill Jones
Tim Bowersox
Today we will cover:

Training New ILL Staff

Virtual Classroom Training

Supporting Staff to Supervise Students
Training New ILL Staff
Department– Overview

- Department Operations
- Staffing
- Annual ILL Activity
Getting Started

Prior to Training : Tech Stuff

- ILLiad settings
- Staff permissions
- Operating systems & Settings
- Printer and Scanner
Training Checklist

- ILL Department overview
- Department Responsibilities
- Interlibrary Loan Policies
- Procedures (Lending/ Borrowing/Doc Delivery)
- Terminology
- Task list
- Customer Service
- Communication
- Do’s and Don’ts
- Troubleshooting
Daily Tasks

1. Check ILL email box. Address any customer concerns.
2. Log into ILLiad.
3. Switch into the Borrowing Module.
5. Process the Awaiting Copyright Clearance folder.
7. Check-in any articles received via email. Change articles’ statuses from Awaiting Post receipt processing to Request Finished.
10. Print new requests.
11. File into active binder.
12. Process any renewal requests. If a renewal request was approved (Awaiting Renewal Request Processing), note the new due date on the appropriate sheet in the active binder.
13. Check in new items received in the mail. Forward any received articles via email to the appropriate patrons and check in as well.
15. Print receives (books only) on green paper.
16. Loose paperwork gets clipped to the appropriate sheet in the active binder. The lending institution, received date, and due date is noted on the sheet.
17. Slips are cut apart and highlight the due date and fine notice.
18. Tape slip to the front cover of the book with removable tape.
19. Contact customers and bring items up to Access Services.
20. Collect any books that were returned.
21. Levy overdue fines, if applicable.
22. Print Returns (can be done on a weekly basis as well).
23. Check LAND list. If there is a book going back to a school that participates in LAND, write the hub and today’s date on the address label. Cut out the label and put the book in a LAND bag. Slide the label into the clear plastic pocket.
24. For non-LAND books, write out the invoices and mail as usual.
Training Materials

- Have the training material ready for the new staff.
- Break down the Steps with Screen Shots & If possible prepare AV training material.
- Think of Loose leaf (easy to make changes)
- Cheat Sheets
- Keep track of your training
Cheat Sheets

- Tips and Shortcuts
- ILL – License Notes
- Scanner Instructions
- Microfilm Digital Reader Instructions
- Shipping Instructions
Show and Tell

- Introduce the interface
- Queues
- Workflow chart
- Break down into different Modules
- Use it as a patron and staff
- Job shadowing co-worker
ILL Competencies

- Basic research skills
- Conduct basic reference interview with a patron
- Understand the components of the request
- Library Resources (Print and Electronic)
- Able to understand and interpret library's
- Interlibrary Loan policy to patrons
- Customer service (Internal and External)
- Technical Skills
Questions

Sreedevi Satyavolu
Manager- ILL/Doc Delivery/ Periodicals &
Adjunct Reference Librarian
Adelphi University
New York
Email: ssatyavolu@adelphi.edu
Thoughts?
Suggestions?
Pilot Course:

Resource Sharing 101

The IDS Project Online Learning Institute’s Course, Resource Sharing 101, provides students with a basic foundation in resource sharing best practices while building a community of support and connections for future troubleshooting and collaboration.

Future Courses:

Mentors in Training

Future courses will include training opportunities for mentors within the IDS Project as well as our extended community.

Workflow Evaluation

Future courses will include opportunities to dive into various aspects of resource sharing workflows and tools including building Addons, ILLiad customizations, Copyright & ILL, marketing your service, etc.
Pilot Course Completed!

• 8 Week Course:
  • January 13\textsuperscript{th} – March 7\textsuperscript{th}
• Online components:
  • Resources
  • Assignments
  • Discussions
• Weekly Web Conference
  • Opportunity to hear from Guest Speakers recognized as experts and innovators in the field.
Guest Speakers:

Beth Posner | CUNY Graduate Center
Megan Gaffney | University of Delaware
Collette Mak | University of Notre Dame
Tom Bruno | Yale University
Chris Keough | University of Buffalo
Lars Leon | University of Kansas

Please join us this Thursday for our third guest speaker: Collette Mak!

Collette Mak is the Outreach and Scholarly Communications Librarian at the University of Notre Dame.

Collette has been passionate about resource sharing from the day she first started work in Interlibrary Loan at the University of Michigan. While at Michigan she earned her MLS and has since worked in academic libraries, OCLC and library consortia. While at OCLC she worked on projects that will be familiar to interlibrary loan librarians—IFM, Custom Holdings and the FirstSearch/ILL Link. She chairs the Indiana State Library Resource Sharing Committee, regularly presents on issues related to resource sharing and the use of data, trains on Excel, and can be seen on YouTube as part of the RUSA STARS Interlibrary Loan topics. Most recently she presented at the North West Interlibrary Loan conferences on market-based baseline data and at ALA on the “Does your Data Deliver” panel and, is the 2012 Virginia Boucher Distinguished Interlibrary Loan Librarian in recognition of her contributions to the field.

Collette volunteered for 12 years as a docent at the Columbus Zoo in Ohio—made famous by Jack Hanna. While I was there I didirth watches on giraffes, counted wolf puppies, spent the night with manatees and once helped clean the bear yard so I can answer with some authority on the age-old question about where bears....

Please post one or two questions for Collette Mak to address.
The IDS Project Online Mentor Institute will provide new Mentors with:

- A basic foundation in the IDS Project history and philosophy;
- the tools to successfully mentor;
- access to Atlas videos; and
- practical, experiential, and hands-on learning with Mentors.
Welcome to the IDS Project Online Learning Institute's Resource Sharing 101 course.
We are excited to work with you!

Please take a few moments to view our Introductory Video and the "Resource Sharing 101 Expectations" document.
<table>
<thead>
<tr>
<th>Course Modules</th>
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<tbody>
<tr>
<td><strong>Week 1: Intro to Interlibrary Loan</strong></td>
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<tr>
<td><strong>Monday: Week 1 Welcome</strong></td>
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<tr>
<td><strong>Tuesday: Wednesday: Introduction Discussion</strong></td>
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<td><strong>Thursday: Meet Your Instructors</strong></td>
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<td><strong>Friday: Week 1 Quiz</strong></td>
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<td><strong>Week 2: Intro to Borrowing</strong></td>
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<tr>
<td><strong>Monday: Week 2 Welcome</strong></td>
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<td><strong>Monday: Week 2 Presentation, Readings, and Assignments</strong></td>
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<td><strong>Tuesday: Wednesday: Borrowing Discussion</strong></td>
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<td><strong>Thursday: Guest Speaker - Beth Posner</strong></td>
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<td><strong>Friday: Week 2 Quiz</strong></td>
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<td><strong>Web Conference with Beth Posner</strong></td>
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<td><strong>Week 3: Borrowing/Copyright</strong></td>
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<td><strong>Monday: Week 3 Welcome</strong></td>
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<td><strong>Monday: Week 3 Presentation, Readings, and Assignments</strong></td>
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<td><strong>Tuesday: Wednesday: Borrowing/Copyright Policies Discussion</strong></td>
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<td><strong>Thursday: Guest Speaker - Megan Gaffney</strong></td>
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<td><strong>Friday: Week 3 Quiz</strong></td>
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<td><strong>Web Conference with Megan Gaffney</strong></td>
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<td><strong>Week 4: Copyright</strong></td>
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<td><strong>Monday: Week 4 Welcome</strong></td>
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<tr>
<td><strong>Monday: Week 4 Presentation, Readings, and Assignments</strong></td>
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<tr>
<td><strong>Tuesday: Wednesday: Copyright for Borrowing and Lending Discussion</strong></td>
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<tr>
<td><strong>Thursday: Guest Speaker - Collette Mak</strong></td>
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<tr>
<td><strong>Friday: Week 4 Quiz</strong></td>
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<tr>
<td><strong>Web Conference with Collette Mak</strong></td>
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### Activity

Each bar represents the number of page views on that day. An orange bar indicates that some user took an action within the course on that day.

#### Table

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<tr>
<th>Student</th>
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<th>Participations</th>
<th>Assignments</th>
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Jan 13, 2014
87 participations
979 page views
Thoughts? Suggestions?
Why is this important?

• People are not as easy to manage as software
• Supervisory skills build over time
  – Soft skills are key: communication, attitude, problem solving (to name a few)
  – Experience is the best teacher
• “Training” in this sense is ongoing
  – Create a supportive environment
  – Clearly define roles & responsibilities
  – Communicate clearly & often
  – Learn from good & bad experiences
Milne Library’s IDS Office

• 2 fulltime staff
  – AM Supervisor: Donna Ayers
  – PM Supervisor: Bill Baker

• Open 72 hours/week over 6 days

• Total request volume: 30,482 in 2013-14
  – Borrowing
  – Lending
  – Document Delivery (loans & articles)
Milne Library’s IDS Office

• Limited to hiring only work study students
  – FWSP awards limit them to roughly 6 hours/week
  – Requires hiring a lot of students to fill our staffing needs
  – More student turnover from year to year
  – Not enough time to become experts in doing everything

• Implications for supervisors
  – Scheduling: supervise more students over shorter shifts
  – Training: teach what needs done at the moment
  – Time management: balancing supervision with other duties
Preparing staff to supervise

• Start with student hiring
  – Get staff involved from the very beginning
    • Establishes accountability over student employees
  – Review, select, and interview applicants
    • Let them review the applicants
    • Work with staff to structure the interview process
  – Discuss and select new hires
    • Talk about student strengths and weaknesses
Preparing staff to supervise

• Develop a schedule together
  – Balance new students with experienced students
    • Eases the training workload
    • Experienced students can mentor new students
  – Schedule students to meet needs
    • Schedule more students during key points of the day
    • Allows supervisors to be more prepared
  – Share the schedule & communicate updates
    • Don’t let supervisors get caught by surprise
    • Online scheduling software is very helpful...
    • But make sure you train staff how to use it effectively!
Example: WhenToWork

<table>
<thead>
<tr>
<th>Monday Feb 3</th>
<th>Tuesday Feb 4</th>
<th>Wednesday Feb 5</th>
<th>Thursday Feb 6</th>
<th>Friday Feb 7</th>
<th>Saturday Feb 8</th>
<th>Sunday Feb 9</th>
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<tbody>
<tr>
<td>9am - 11am</td>
<td>9am - 11am</td>
<td>9am - 11am</td>
<td>9am - 11am</td>
<td>9am - 11am</td>
<td>9am - 11am</td>
<td>5pm - 7pm</td>
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<tr>
<td>Mary Cicero</td>
<td>Michael Adams</td>
<td>Mary Cicero</td>
<td>Michael Adams</td>
<td>Emily Ramirez</td>
<td>Saarah Shakedel</td>
<td>Franklin Hernandez</td>
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<td>11am - 1pm</td>
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<tr>
<td>Lesley Dalton</td>
<td>Siobhan Pfaff</td>
<td>Lesley Dalton</td>
<td>Siobhan Pfaff</td>
<td>Saarah Shakedel</td>
<td>Saarah Shakedel</td>
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</tr>
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<td>1:30pm - 3:30pm</td>
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<tr>
<td>Abigail Stein</td>
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<td>Mary-Margaret Gallup</td>
<td>(deleted)</td>
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<tr>
<td>5pm - 7pm</td>
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<tr>
<td>7pm - 9pm</td>
<td>Mary-Margaret Gallup</td>
<td>Mary-Margaret Gallup</td>
<td>(deleted)</td>
<td>Franklin Hernandez</td>
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</table>

Schedule Notes:

Note to Employees: Add/Edit

Note to Managers: Schedule History
Preparing staff to supervise

• Review & develop training materials
  – Student training checklists are vital
    • Outline orientation & training
    • Keeps track of progress with each student
    • Can be shared: helpful when students work with different supervisors
  – Develop them together
    • Your staff will know what they need their students to learn
    • Cheat sheets, tutorials, & videos can support training
  – Review with staff before each semester
    • Has anything changed that students need to know?
    • This can also serve as a refresher for staff
Example: Checklists

<table>
<thead>
<tr>
<th>Training Checklist - IDS Office</th>
<th>Name: ____________________________</th>
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</table>

### Day 1: Orientation

<table>
<thead>
<tr>
<th>Task</th>
<th>Date Completed</th>
<th>Trained By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Know attendance expectations &amp; timesheets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using WhenToWork</td>
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<td></td>
</tr>
<tr>
<td>Using LibIDSoffice-L</td>
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<tr>
<td>Tour Milne Library</td>
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<tr>
<td>Tour Fraser Storage &amp; Reading Room</td>
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<tr>
<td>Understand LC call numbers: use tutorial at <a href="http://www.library.kent.edu/page/13760">http://www.library.kent.edu/page/13760</a></td>
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</tr>
<tr>
<td>Log into IDS Office computers</td>
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</tbody>
</table>

### Process: Retrieving materials from the shelf

<table>
<thead>
<tr>
<th>Task</th>
<th>Date Completed</th>
<th>Trained By</th>
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</thead>
<tbody>
<tr>
<td>Update lending stack search results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check items out to IDS Aleph account</td>
<td></td>
<td></td>
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<tr>
<td>Sorting outgoing lending loans</td>
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</tr>
<tr>
<td>Update doc del stack search results</td>
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</tbody>
</table>
Example: Cheat Sheets

ALEPH Circulation: Lending

Step 1. Click the "..." button.

Step 2. Type "ids" and press the "Enter" key.

Step 3. Double-click on the IDS account when it appears.
Example: Cheat Sheets
Example: Cheat Sheets
Establish roles & responsibilities

• Staff will be better supervisor if you clearly establish roles & responsibilities
  – Who manages scheduling? How will changes be shared?
  – Who is responsible for time & attendance records?
  – How will students be evaluated?
  – Who can fire underperforming students?

• Consider creating a student handbook
  – Students know the rules of the road up front
  – Makes it easier for supervisors to enforce expectations
  – Also serves as training resource for new supervisors
Other considerations

• Consider office layout
  – How far are your supervisors from your students?
  – At Geneseo, staff can directly observe the student work area
    • Easier for students to ask for help
    • Easier for staff to supervise with less interruption
    • Can really help minimize mistakes

• Facilitate easy communication
  – Email lists
  – Bulletin boards & whiteboards
Example: Geneseo’s IDS Office
Professional development

• Encourage staff to build their supervisory skills
  – Local workshops (check with your HR Office)
  – Union workshops
  – Regional, State, or National workshops & conferences

• Discuss supervision regularly
  – Meet regularly with staff to discuss what’s going on
  – Solve supervision problems together
  – Learn from good and bad experiences
Discussion prompts

• What is one obstacle facing student supervision at your library? How might you overcome it?

• Share one tool you use to train or support your staff.
Group Discussion
Thank you!

Sreedevi Satyavolu (ssatyavolu@adelphi.edu)
Bill Jones (thebilljones@idsproject.org)
Tim Bowersox (bowersox@geneseo.edu)