UC BERKELEY LIBRARY

MENTORING PROGRAM

for Circulation Services Staff

Developed by the Mentoring Program Subcommittee
Of the Circulation Services Group

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University of California, Berkeley
Berkeley, CA 94720-6000

UC Berkeley Library
Mentoring Program for Circulation Services Staff

Proposal Developed by the Mentoring Program Subcommittee of the Circulation Services Group/June, 2002.

Background

The idea for a Mentoring Program grew out of a number of discussions among circulation services staff who strongly expressed the need for a formal support system to help new circulation services employees better integrate into the Library system. Recognizing the importance of addressing this need, the Circulation Services Group responded by forming the Mentoring Program Subcommittee in June 2001. The subcommittee was charged with developing a draft proposal for such a program and recommending an implementation process.

Purpose of the Mentoring Program:

To provide support to the units' supervisors by pairing a new library circulation employee with two staff experienced in circulation services. In this informal relationship, the new employee receives assistance from someone who takes on the responsibilities of a "friend in need." In this way, the program aspires to assist in the learning process and to help familiarize the new library employee with the complexities of a large and decentralized library system, thus effectively providing a link to the Library-wide community.

It is important to note that Mentoring is not intended to:

- Replace the normal training provided by the new employee's supervisor.
- Supersede the authority of the supervisor to define duties, responsibilities, and local practices.
- Create a pool of experienced circulation staff to be used for workload mitigation or emergency backup.

Benefits of Mentoring:

- Translates the knowledge and experience of seasoned staff to new library staff.
- Motivates and improves performance by understanding that the work is meaningful, important, and appreciated.
- Enriches and refreshes the mentors by creating a cooperative environment.
- Develops a strong network of circulation staff throughout The Library, promoting consistent and excellent public service.

Goals of the Mentoring Program:

- To create a smooth and consistent orientation for all new library circulation staff.
- To provide a supportive learning environment for the new library employee.
- To integrate new library circulation staff into the UC Berkeley Library system.
- To provide new staff with the tools and resources necessary to navigate the web of intricacies/complexities within the UC Berkeley campus.
- To share the knowledge and expertise held by veteran staff with new and inexperienced staff.
- To foster the exchange of ideas and discussions between all libraries and library staff.
- To increase the level of excellence of the library circulation staff at UC Berkeley.

Definitions and Roles:

The Mentor: A mentor is an experienced library employee who volunteers to serve as a guide, counselor, role model, and friend to the new employee. The Mentor advises, encourages and offers support to the Mentee. While the Mentor is not responsible for training the new employee, the Mentor is an additional resource for the Mentee, someone to whom questions may be directed. His/her task is to expand and deepen the newly acquired knowledge of difficult library procedures. Qualities of a mentor include:

- In-depth knowledge of circulation processes and procedures
- Understanding of circulation workflow and procedural variances between the different libraries on campus
- Strong interpersonal and communication skills
- Ability to work with diverse staff
- Willingness to share expertise and time

The Mentee: The Mentee must be willing to learn and communicate his/her needs and expectations, ask questions, and assist in the review of the Mentoring Program.

Role of the Mentor Coordinator: The Mentor Coordinator facilitates the program. He/she is responsible for organizing and leading meetings, initiating the pairing process, and discussing the program. The Mentor Coordinator provides the program guidelines to the program participants ensuring that each participant knows what to expect. He/she serves as the main contact for all Mentors and Mentees who are part of this program and assumes responsibility for resolving issues.

Role of the Mentoring Program Committee: The Program Committee is established by the Circulation Services Group and reports to this group through the Chair and/or Co-chair. The Committee has the overall responsibility for the planning and implementation of the program and monitors its progress.

Guidelines for the Mentor and the Mentee:

For the Mentor:

- The Mentor must have adequate time to commit to the program.
- The Mentor should not be working in the same unit/department as the Mentee.
- The Mentor is expected to:
  - Establish clear methods of communication with the Mentee
  - Specify contact arrangements via telephone, e-mail, etc., and set up meetings
  - Review and clarify Library-wide procedures
  - Provide resources
  - Keep in mind that the Mentee needs to follow the established procedures of the hiring unit
  - Assist, not train.

For the Mentee:

- Attend the meetings set up by the Mentor.
- Be clear about your needs and expectations.
- Ask questions and engage in discussion.

- Communicate to your Mentor how the partnership is or is not meeting your needs.

General Principles of the Mentoring Program:

- While it is expected that the time needed to mentor may vary depending on circumstance, and that the relationships formed during the Mentoring Program will continue after the duration of the program, the official time frame will be one year.
- It is anticipated that mentoring will not exceed 1-2 hours per week. This includes meetings as well as consultations via telephone and/or e-mail. It is expected that this time commitment will decrease over time.
- All Mentors and Mentees will participate with supervisory approval.
- The Mentoring Program will be run by the Mentor Coordinator who will serve a one-year appointment, with an assistant Coordinator on a two-year appointment (one year as the assistant and one year as the coordinator).
- Two Mentors will be assigned to each new employee, one from Doe/Moffitt Circulation Services (DMCS) and one from a subject specialty library. New employees at DMCS will have only one Mentor from a subject specialty library, as it is assumed they will be routinely trained on DMCS procedures. The pairing of two Mentors per Mentee benefits both by exposing the Mentee to different aspects of the University Libraries, while dividing the time commitment of mentoring between two people.
- Any LA (Library Assistant) with at least one year experience, feeling strongly that they have in-depth knowledge about library procedures, is eligible to be a Mentor. Final approval is needed from supervisor.
- As the Mentoring Program is an important part of service to The Library, we recommend that Mentors receive formal recognition for their efforts in their job description and performance appraisal.

The Process/Implementation:

Within the first month that a new circulation employee joins The Library, the Chair of the Circulation Services Group will contact the supervisor and the new circulation employee, and let them know about the Mentoring Program. The CSG Chair will also alert the Mentor Coordinator to the arrival of the new circulation employee.

The Mentor Coordinator then organizes and heads a first meeting to launch the pairing process and discuss the program. The first meeting is aimed at accomplishing the following:

- Provide general guidelines to the Mentor and Mentee
- Formal pairings are negotiated/determined
- Agreements are established, so both the Mentors and the Mentee know what to expect

The primary tool for all Mentors and Mentees will be the Circulation Services Training Checklist (see Appendix). Utilizing a standard document will ensure that all pairs have a systematic approach to guiding new members through basic circulation policies and procedures in a timely fashion.

Program Scope and Assessment:

Although this program is geared solely towards circulation staff, there is no reason that it couldn't be broadened to include staff with other specialties. There will be regular assessment of the program by the Mentoring Program Committee and The Circulation Services Group.

Support and Resources for Mentors:

- Arrange quarterly meetings for Mentors
- Campus Mentor Workshop - Russell Kaltschmidt
  http://hrweb.berkeley.edu/learning/sip/workshps.htm
- CALS Tutor Project - Jane Griswald
  http://hrweb.berkeley.edu/learning/cals/tutors.htm

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MENTORING PROGRAM FOR CIRCULATION SERVICES STAFF

Circulation Services Checklist

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I. Human Resources

Staff

- Job Description
- UC Human Resources and Benefits http://atyourservice.ucop.edu/index.html
- PAF (Personnel Action Form) - will change to HRMS in the near future
- Direct Deposit
- Sick/ Vacation Leave Accrual
- Orientation Training
- Classification Schedule
- Performance Evaluation Schedule
- CU Newsletter - The Library's Weekly Newsletter
- University Staff Resources
- Circulation Services Group
- Training Resources - Staff Development Committee, ICE, Calpact, Teaching Library

Students

- Job Description
- SLE Classification Levels
- Kronos (online Timekeeping Management System)
- Payroll Contact (see Resource List)
- HR Contact (see Resource List)
- Posting a Job
- Student Employee Handbook
- Reclassifications
- Student Task Lists
- Monthly GA Reports through BAIRS II
- Workstudy Students
- Graduate Students
- Sick/ Vacation Leave Accrual
- Leaving Employment Forms
- Supervisory Training through LHRD
- SLE Borrowing Privileges

II. Circulation

- Goals for Circulation Services http://www.lib.berkeley.edu/Staff/PS/Circ/

Stack Maintenance/Shelving

- LC Classification
- Sweeps
- Unbound Journals
- Shelf-reading
- Shifting
- Stacks Straightening/Maintenance
- Journal Use Study

Types of Library Cards

- ☐ Loan Privileges
- ☐ Privileges Desk
- ☐ Student ID Cards
- ☐ Staff ID Cards
- ☐ Stanford Cards
- ☐ Proxy Cards
- ☐ Reference Cards
- ☐ Community Member Cards
- ☐ Summer Session Cards
- ☐ Other : Alumni, Postdoc, Visiting Scholar, etc…Refer to Privileges Desk

Introduction to GLADIS Auto-circ

- ☐ Logging on & off of GLADIS Auto-circ
- ☐ Auto-circ Commands
- ☐ Circulation Services Manual online
  http://www.lib.berkeley.edu/AboutLibrary/Staff/CircMan/
- ☐ Set Due
- ☐ Patron File
- ☐ Circ ID : Either a Student ID, Employee ID or Library Card Number
- ☐ Expired or Blocked Cards
- ☐ Soft Block vs. Hard Block
- ☐ Set E-mail On/Off

Charging

- ☐ Desensitize
- ☐ Patron Confidentiality- Federal Act of Privacy (note: it is essential to clear the screen after charging out materials to a patron so as not to leave their information on the screen)
- ☐ Loan Privileges
- ☐ Patron Address Update Forms
- ☐ Date Due Stamps
- ☐ Circulation Codes (Loan Periods)
- ☐ Manual Charges
- ☐ Theses/Dissertations
- ☐ Room Use Only Items-- e.g. current journals at most units
- ☐ ILL and Baker Charges
- ☐ Books with Multiple Holds
- ☐ Unofficial Hold Shelf
- ☐ Microfiche/ Microfilm
- ☐ Block/ Blocked at the Service Desk
- ☐ Media Resources (i.e. CD’s, Videos, etc.)
- ☐ Unit Accounts
- ☐ Circulation Notes
- ☐ Set E-mail Preference

- ☐ Institutional ID’s (i.e., CONS, ILL, id=<loc> etc…)

Discharging

- ☐ Sensitize
- ☐ Holds
- ☐ Reserve Items
- ☐ Media Resources (i.e., CD’s, Videos, etc.)
- ☐ Circulation Notes
- ☐ Book Drops
- ☐ Book Return Receipts
- ☐ Technical Services Notes
- ☐ Conservation
- ☐ Billing for Damaged Books
- ☐ Re-Labeling
- ☐ Books from Other Libraries
- ☐ Items in TRF (In Transit to NRLF From <loc>) / TRT (In Transit from NRLF To <loc>)

Patron’s Inventory

- ☐ Renew
- ☐ Grace Periods
- ☐ CARS Information (see Billing Section) http://www.lib.berkeley.edu/CARS/

GLADIS and Pathfinder Searching

- ☐ Search Codes & Commands
- ☐ Detail Display (det)
- ☐ Short Display (sho)
- ☐ Brief Display (br)
- ☐ Marc Display (marc)
- ☐ Long Display (lo)
- ☐ Order Display (ord)
- ☐ Searches
- ☐ Recalls
- ☐ Requesting NRLF items
- ☐ Analyzed Sets (Analytics) / Multivolume Monographs (mvm's)/Serials (se)
- ☐ Items charged to Missing
- ☐ Items charged to Withdrawn
- ☐ Items charged to Referred For Replacement (RFR)
- ☐ Tutorials for Pathfinder: http://sunsite2.berkeley.edu:8000/html/help/helptopics.html

CDL Searching

- ☐ Proxy Service/ IP Account for Off-campus Access (overview)
- ☐ U.C. Berkeley Proxy Service http://proxy.lib.berkeley.edu/
- ☐ California Digital Library (CDL) Requests

Public Service Policies

- ☐ LSPP : Library Services Priority Program
  http://www.lib.berkeley.edu/AboutLibrary/Staff/PSM/lspp.html

- Food and Drink
- Conduct Policy/Noise Policy http://www.lib.berkeley.edu/Staff/PS/PSM/lol75.html
- Theft Policy http://www.lib.berkeley.edu/Staff/Emergency/theft.html

Circulation Supervisor Logon

- Patron Update
- Claims Returned
- Discharge Free (dcf)
- Unblock
- Restore
- Override Blocked Cards

Circulation Desk Items

- Circ Cards (overview)
- Opening and Closing Procedures
- Copy Services
- E-mail Notification
- Hours
- Phone Referrals
- Reference Referrals
- Directional Questions
- Telephone Contact List
- Library Information Workshops (i.e., Teaching Library, etc.)
- Library Information Guides http://www.lib.berkeley.edu/Staff/OrderGuides.html
- Lost and Found/ local and campus
- Security Gate Policy
- Microcomputer Facilities
- Media Resource Center
- Group Study Rooms
- Printers
- Departmental Contacts
- Sorting Mail
- Campus Office Supply Ordering System
- Unit E-mail Accounts
- Mainly at Moffitt

NRLF

- Access Services Department
- Deposit Services Department
- Records for NRLF items owned by Berkeley
- Records for NRLF items (n-level) owned by Davis, San Francisco, Santa Cruz
- Transfer From (TRF) / Transfer To (TRT)
- Overdues and Searching
- Placing Holds and Setting Pickup Location
- Ariel Document Delivery
- Web Delivery

- NRLF Requests via Pathfinder

Note: Some of the Affiliated Libraries do not use GLADIS and may adhere to different policies and procedures. http://www.lib.berkeley.edu/AFFIL/

III. Reserves

- Reserves Manual <web address when available>

Creating Reserve Lists

- Course and Instructor Commands
- Set Prep
- Semester Abbreviations
- Semester Default
- Course Abbreviations
- Reserves Preparation (Prep)
- Downloading Reserve Paging Lists
- Reson
- Reserve Processing
- Permanent/ 2-hour/ One-Day/ One-Week
- Resoff

Other Reserve Items

- Electronic Reserves (ERES)
- Reserve Prep Cards
- Moffitt Reserves
- Non-lending libraries
- RC-Command to create X-level records for misc.
- Prepping “On Order” items
- NRLF Items on Reserve
- X-level Records

IV. Technical Services

- Branch Processing Manual http://www.lib.berkeley.edu/AboutLibrary/Staff/BPM/

Series and Serials

- Serials
- Series Title / Analyzed Sets (Analytics)
- Innopac Check-in Records
- Journal Use Study

Monographs

- Promptcat Books (pcat)
- Received Date
- Procedures for Replacement Copies
  - Billed to Patron / Referred for Replacement (RFR)

    - Missing Withdrawn
    - Replaced by Patron

Procedures

- ORD-Command to pull up the order record in GLADIS
- Missing
- Withdrawn
- Referred for Replacement (RFR)
- Sensitize
- Adding Barcodes
- Tracing Books from Technical Services Departments

Units

- Conservation
    - Mending
    - Binding
- Cataloging
- Promptcat
- Innopac
- Cataloging, Order, and Reserves Division (Core Division)
- Out-of-print
- Processing
- Duplicate Copies
- Labeling
- Property Stamp
- Gifts & Exchange

V. Billing

- Campus Accounts Receivables System (CARS) http://www.lib.berkeley.edu/CARS/
- CARS Late Fees
- Binding Fee
- CUBS
- Cashier’s Office
- Fining
- Soft vs. Hard Blocks
- 03 Patron Recalls
- Billing
    - Automatic
    - Manual
- Blocking for Invalid Address (Privileges Desk)
- Discharge Free (dcf)
- Claims Returned (cr)
- Processing Charge
- Patron Supplied Replacement Copies

VI. Miscellaneous

Safety Information

- Security Officers
- Incident Reports
- Problem Patrons
- IIPP (Injury and Illness Prevention Program)
- BEP (Building Emergency Plan)

Facilities

- Salvage
- Help Desk (computer problems)
- Zone Representative
- Building Management Services

VII. Resource List

- Library Website http://www.lib.berkeley.edu/
- Library Councils & Committees http://www.lib.berkeley.edu/Staff/committe.html
- University Concerts and Lectures
- Early Birds

(For a complete listing of library staff see http://www.lib.berkeley.edu/Staff/byunit.html)

Benefits	Laurie Pangelina
Bindery	Gary Quien
CARS/ Billing	Peter Soriano
Computer Problems	Help Desk 2-6120 or helpdesk@library.berkeley.edu
Conservation	Cameron Olen
Copier Problems	Xerox 3-0931
CUBS cancellations	Penny Bertrang
GLADIS: Accounts, Cards, Passwords	Charis Takaro 2-6121
Human Resources	Juana Loza
Main Circulation	Peter Soriano
Microfiche Machine Problems	Library Copy Service 2-5994
Monographic Maintenance	Tonette Mendoza monmaint@library.berkeley.edu
Monographs	Margaret McCormick
NRLF	Jutta Wiemhoff - Access Services
Order Division	Jim Gordon
Organizational Development	http://www.lib.berkeley.edu/Staff/OrgDev/implement.html
Payroll	Betty Mew
Pest Management	2-0878
Public Service Manual	http://www.lib.berkeley.edu/Staff/PS/PSM/
Safety	Building Coordinator
Security	Miguel Labon 2-3613
Serials	Judith Walker
Serials Maintenance	Jane Kelley sermaint@library.berkeley.edu
Service Desk	Joyce Ford
Staff Homepage	http://www.lib.berkeley.edu/Staff/

Statement of Purpose	http://www.lib.berkeley.edu/Staff/AboutLibrary/purpose.html
Statement of Values	http://www.lib.berkeley.edu/Staff/AboutLibrary/values.html
Student HR	Laurie Pangelina
Technical Services Contact	http://www.lib.berkeley.edu/AboutLibrary/Staff/BPM/8sdir.html/