

**University of Miami**

---

**From the Selected Works of Dennis J Smith**

---

Fall October 5, 2011

## Core Competencies Task Force Report

Dennis J Smith, *University of South Florida*

Jessi Hurd, *University of South Florida*

LeEtta Schmidt, *University of South Florida*

Nancy Jacobs-Dilley, *University of South Florida*

Gabriella Harmon, *University of South Florida*



Available at: <https://works.bepress.com/dennisjsmith/1/>

# **Report from USF Libraries Core Competencies Task Force**

Submitted to the Dean of the USF Libraries  
October 5, 2011

## **Library Task Force:**

- Jessi Hurd, Library Operations Manager – Academic Resources
- LeEtta Schmidt, Library Operations Manager – Academic Services/InterLibrary Loan
- Dennis Smith, Library Operations Manager – Academic Services/Access Services
- Nancy Jacobs-Dilley, Office Manager – Administration – Human Resources

## **USF Talent Management:**

- Gabi Harmon, Learning & Development Facilitator

## Table of Contents

Executive Summary .....	2
Background .....	4
Charge .....	4
Scope .....	4
Process .....	5
Literature Review .....	5
Projects .....	5
Skills Listings .....	5
Core Competencies .....	6
Performance Indicators .....	6
Skills Training Program .....	6
Results .....	7
Recommendations .....	8
Conclusion .....	9
Appendix A: Bibliography .....	10
Appendix B: Skills Database .....	13
Database Skills Example .....	13
Database Illustrations .....	14
Appendix C: Core Competencies and Performance Indicators .....	16
Appendix D: Training Reports .....	17
Skills Inventory Questionnaire Access Services Sample .....	17
Skills Inventory Questionnaire Library Specialist Sample .....	21
Appendix E: Skills Training Plan Forms .....	25

## **Executive Summary**

### **Background**

The Competencies and Skills Assessment Task Force was charged with identifying skills and competencies required for library staff. A plan was developed for identification of skills, staff responsibilities, training and evaluation of training. During research on this project, the team determined that skills needed to be tied to performance.

### **Scope**

The task force identified six tasks (Skills Listing, Skills Database, Core Competencies, Performance Indicators, implementation of indicators, and skills training program). These tasks were focused on staff positions located in the library that was identified through the USF Classification and Compensation program.

### **Process**

The task force conducted extensive research that involved resources from other USF Units, library competencies documents, and programs in other libraries. The team incorporated information from national competencies program such as the American Library Association's program and used extensive information from York University Core Competencies document.

The completion of the tasks identified resulted in the completion of four projects (Skills Listings, Core Competencies, Performance Indicators and Skills Training Program). The skills listing project identified baseline skills for each functional area and position. This list was incorporated into a database that provided a system to be used in the Skills Training program. Core competencies were developed for library staff and were correlated to the performance indicators in USF Staff Evaluations. This document may be used to promote a baseline for fair performance assessment and standardized expectations across departments in the library.

### **Results**

The task force completed the four projects. The skills listing were developed into a database which allowed for the development of a skills training database to train current staff and prepare training for new employees. This system will be available to all library supervisors through the USF Sharepoint system.

The Core Competencies and Performance Indicators document was approved by the library and is already in use for the current evaluation system. The task force conducted departmental meetings, individual staff sessions and supervisor training to facilitate the introduction of this program. Additional workshops were also conducted by Talent Management which involved dealing with change, performance self-assessments and supervisors training in the evaluation system.

## Recommendations

The task force recommends full adoption of the skills database, Core Competencies and Performance Indicators, Training Forms and Skills Training plan. This would involve a yearly review of the documents by a team from various library departments. Additionally, the skills database should be used to develop plans for all current and future staff with a one year transition for all current staff members. The skills database should also be used to develop new staff job postings so appropriate skill needs are identified.

## Conclusion

The task force developed the skills database and documents as an enhanced tool for library supervisors and manager. This will provide some shared agreement and standardization with the library and increase library communication. These tools will also provide inventories of staff skills to facilitate a competent workforce focused on achieving the strategic goals of USF and the Library while contributing greatly to student success.

## **Background**

### **Charge**

The Competencies and Skills Assessment Task Force was charged with identifying skills and competencies required for library staff to successfully fulfill their duties and responsibilities. The task force developed a plan that would identify skills and competencies required for various levels of responsibilities in order to recommend training and provide a means of evaluating training success.

During the course of research, it became apparent that a comprehensive treatment and successful adoption of skills and competencies for library staff would need to be strongly linked to the staff development process and performance review system already in place at the University. Performance indicators from the annual staff performance evaluation were defined and included in the task force's work and focus. Tying the skills, competencies, and performance indicators together was necessary to clearly define what the performance expectations are for the USF Library.

### **Scope**

The task force initially identified specific tasks to be accomplished in order to meet its objects. These tasks were:

1. Create Skills Listing
2. Develop Skills list into a database
3. Develop Core Competencies for Staff
4. Write and develop Core Competencies and Performance Indicators Document
5. Educate library staff on Performance Indicators Document and its application to the performance review process
6. Develop Skills Training Program that incorporates the competencies and skills

All projects were to focus on staff positions in three Job Families in the USF Classification and Compensation program. These families were identified as:

1. Administrative & Business Services
2. Campus Operations & Services
3. Library & Museum

The project was limited to all job titles within these families represented in library positions and within pay bands B through D which represent staff level positions.

## **Process**

### **Literature Review**

The task force researched and reviewed several different types of resources including University projects currently underway, competencies documents for libraries in general, and programs already developed surrounding competencies for libraries. Information gathered during the research process was used to formulate a strong grounding for the USF Tampa library skills and competencies. In addition, the task force reviewed national academic library culture literature and checked project development against University goals and standards. The American Library Association Competencies, Web Junction Competencies for Libraries, and New York University Core Competencies, though focused on librarian level work, helped to provide a basis and structure for the development of staff level competencies. The York University Core Competencies provided a thorough listing of competency headings that was used as a foundation for developing our competencies listing. Projects reviewed that were within the University System and related to core competencies included USF Parking & Transportation and USF Physical Plant. These projects were primarily based on the USF Evaluation System and related skills to performance indicators listed on the staff evaluations. The task force also reviewed the USF Standards of Service, USF Library standards of service and materials from the USF Talent Management professional development series of classes. These materials provided a basis for specific core competencies related to services.

### **Projects**

The task force developed and completed four projects. These were:

1. Skills Listings
2. Core Competencies
3. Performance Indicators
4. Skills Training Program

### **Skills Listings**

The task force initial work began with developing a listing of skills required of staff members within each of the library departments. This list eventually expanded to include applied knowledge, systems, concepts, and equipment skills required of every staff member with notations on departmental applicability. After sorting by department, assessment levels were added to the skills listing in order to balance the need for skill detail, which could become cumbersome when applied to training. The assessment levels, developed by Jessi Hurd, allowed supervisors to place a depth of knowledge

needed on skills from unaware to expert that would allow one general skill to be used in several different areas. Once the comprehensive listing had been developed, it was converted into an Access database. LeEtta Schmidt imported the lists and assessment levels into a searchable database structure (Appendix B) which allows updating the lists and production of skills reports for each staff position and department (Appendix C). Assessment levels for each position and department were subdivided by three levels (New hire, six months, one year), to assist supervisors in developing training plans for new and current staff members.

### **Core Competencies**

The task force used the York University competency list as a starting point for defining the staff's core competencies and creating a good foundation for the skills listing. However, final division of the core competencies into ten strategic areas was based on the USF Employee Evaluation system. Eight of the areas are the standard performance indicators established in the annual performance review document and two were developed by the task force as performance indicators that should be used in future evaluations. The additional performance indicators were "adaptability", which should apply to all staff members and "managing people" which would apply to those staff members who supervise others or student assistants. Each strategic area included optimal core competencies that reflected the needs of the library and the skills required by a technically competent and productive work force. These core competencies were developed as standards that would help promote the development of highly professional staff.

### **Performance Indicators**

In order to provide guidelines that help to identify performance levels which relate to the optimal core competencies, the task force defined and created examples for each of the ratings as they applied to the performance indicators in the annual performance review form. The document created combined the optimal core competencies with flexible performance indicator guidelines. This document may be used to promote a baseline for fair performance assessment and standardized expectations across departments in the library.

### **Skills Training Program**

The task force reviewed the USF Training program forms and made recommendations for change (see appendix E) in order to incorporate the library's core competencies and skills into an Skills Training Program for library staff personnel. Training reports would



be used to develop plans for new hires so that they can achieve the indicated competency levels within the 6 month and 1 year time frames.

## **Results**

The task force was able to complete all four projects intended to implement a comprehensive skills program for library staff personnel.

The original Access skills database was linked to a Sharepoint site on the USF network. This will allow all supervisors to access the database in order to review skills listings and reports. It will also provide a location for documentation and collaboration surrounding staff development and the annual review process. Formal position reports are available on the Sharepoint site and may be downloaded for use in the training plans for new and current staff members. Updates in skills and areas may also be accomplished through the site.

The Core Competencies and Performance Indicators document was submitted to the Library Management Team for review and was granted approval in late November 2010. This document allowed managers in the building to begin implementation of the included guidelines. Several training sessions were offered to facilitate the introduction of the document and process to the library.

- December 2010, Informal meetings were arranged with supervisors within the library and members of the task force to introduce the document.
- October 28th 2010????A workshop was conducted by Gabriella Harmon, Talent Management, on transitions. This workshop was designed to help staff members deal with transitions of the organization and their departments.
- January/February 2011, Members of the task force conducted an all staff workshop to introduce this document to staff. A presentation followed by a positive and open discussion was held. Members of the task force later met individually with their staff members to discuss how the new process would be handled within their individual departments.
- May 11th 2011, A workshop for supervisors was conducted by Gabriella Harmon, Talent Management, on the USF evaluation system and how to incorporate the new Performance Indicators. It also dealt with other topics designed to help supervisors write effective evaluations.

- March 17th 2011, A workshop for staff was conducted by Gabriella Harmon, Talent Management, on how to write self-assessments to be used in their evaluations. This workshop was designed to help staff provide input into their evaluations and to help them understand their part in the evaluation process.

Discussions with USF Human Resources, employee relations, facilitated minor updates to the document to add more flexibility for supervisors and provide clarification to help staff use the document more easily.

Training reports from the skills database were used to evaluate skill training forms. The USF Training plan forms were found to be useful for facilitating an Skills Training Program at the library with some minor edits.

## **Recommendations**

The task force recommends full adoption of the skills database, Core Competencies and Performance Indicators, Training Forms and Skills Training plan. Specifically:

1. The Skills Database should be used as the basis for maintaining listings of basic skills needed for positions within the library. The task force recommends that this skills listing be reviewed by all departments on a yearly basis for adding and updating of skills needed by staff.
2. The Core Competencies and Performance Indicators should be used by supervisors, as the basis for reviewing and evaluating staff personnel. This document should be reviewed by a small committee of the library on a yearly basis to ensure it continues to be relevant to staff and supervisors.
3. The Training Reports derived from the skills database should be used to develop plans for all current and future staff.
  - a. The task force recommends a one year transition for all current staff members to allow them the opportunity to meet the recommended competencies levels for each skill required in their position.
  - b. New position postings should be reviewed to ensure that all the skills clusters listed in the training reports are identified. These

reports should be used as a basis for posting and position descriptions for all staff.

- c. The skills training program should include the training report from the skills database for each new staff member. Supervisors should develop a plan for each new employee to achieve full competency at the six-month and one-year point.

## **Conclusion**

The task force believes the documents it developed will be excellent tools in the management, training, developing, and evaluating of staff personnel within the library. Task force composition lead to the development of a unified view of training and evaluation, standardization of basic skills set needed within the Library and contributed to increase across departmental communication. The task force attributes its effectiveness to periodic and open communication of the process as it was being developed, coupled with appropriate transition training, which leads to a greater understanding and acceptance of the process by library personnel. These tools will provide a basis for conducting inventories on staff skills, training, and evaluations which will facilitate the creation of a competent workforce focused on achieving the strategic goals of USF and the Library while contributing greatly to student success.

## Appendix A: Bibliography

American Library Association. (2011). *ALA / core competencies*. Retrieved 7/28/2011, 2011, from <http://www.ala.org/ala/educationcareers/careers/corecomp/corecompetences/index.cfm>

American Library Association. (2011). *ALA learning – technology skills library staff should have*. Retrieved 8/1/2011, 2011, from <http://alalearning.org/2011/01/21/techskills/>

Association of Southeastern Research Libraries. (2000). *Shaping the future: ASERL's competencies for research librarians*. Retrieved 8/1/2011, 2011, from <http://www.aserl.org/programs/competencies/>

Boston University. (2011). *Project management training and skills assessment rating scale from boston university*. Retrieved 7/28/2011, 2011, from <http://www.butrain.com/mdp/CompRating.asp>

Foreign Service Institute. (2007). *Foreign service institute (FSI) - speaking and reading language proficiency test for arabic, russian and spanish rating scale* (<http://www.butrain.com/mdp/CompRating.asp> ed.) Guide to Educational Credit by Examination.

Gutsche, B. (2009). *WebJunction - competencies*. Retrieved 8/1/2011, 2011, from <http://www.webjunction.org/competencies/-/articles/content/67024491>

Gutsche, B. (2010). Coping with continual motion. *Library Journal*, 2011(03/01/2010)

Retrieved from <http://www.libraryjournal.com/article/CA6719414.html>

McNeil, B., & Association of Research Libraries Office of Leadership and Management Services. (2002). *Core competencies a SPEC kit*. Washington, D.C.: Association of Research Libraries Office of Leadership and Management Services.

OCLC. (2010). *WebJunction - competencies for libraries*. No. 214247USB).OCLC.

Retrieved from

[http://www.webjunction.org/c/document\\_library/get\\_file?folderId=94651303&name=DLFE-25360002.pdf](http://www.webjunction.org/c/document_library/get_file?folderId=94651303&name=DLFE-25360002.pdf)

Ohio Library Council. (2008). *Education & events: Ohio public library core competencies*. Retrieved 8/1/2011, 2011, from

<http://www.olic.org/corecompetencies.asp>

Thompson, S. M. (2009). *Core technology competencies for librarians and library staff : A LITA guide*. New York: Neal-Schuman Publishers.

University of South Florida. (2011). *Human resources - classification & compensation*.

Retrieved 7/28/2011, 2011, from <http://usfweb2.usf.edu/human-resources/class-comp/index.asp>

University of South Florida. (2011). *Performance management*. Retrieved 7/28/2011,

2011, from <http://usfweb2.usf.edu/human-resources/employee-relations/performance-management.asp>

University of South Florida. (2011). *Physical plant staff evaluation system (preliminary)*.  
Unpublished manuscript.

University of South Florida Talent Management. (2011). *Management certificate program*. Retrieved 7/28/2011, 2011, from <http://usfweb2.usf.edu/human-resources/talent-management/professional-development/management-certificate-programII.asp>

York University. (2001). *York university competency dictionary*. Unpublished manuscript. Retrieved 10/01/2010, from [http://www.yorku.ca/hr/documents/Competency\\_Inventory.pdf](http://www.yorku.ca/hr/documents/Competency_Inventory.pdf)

## Appendix B: Skills Database

### Database Skills Example

Skill

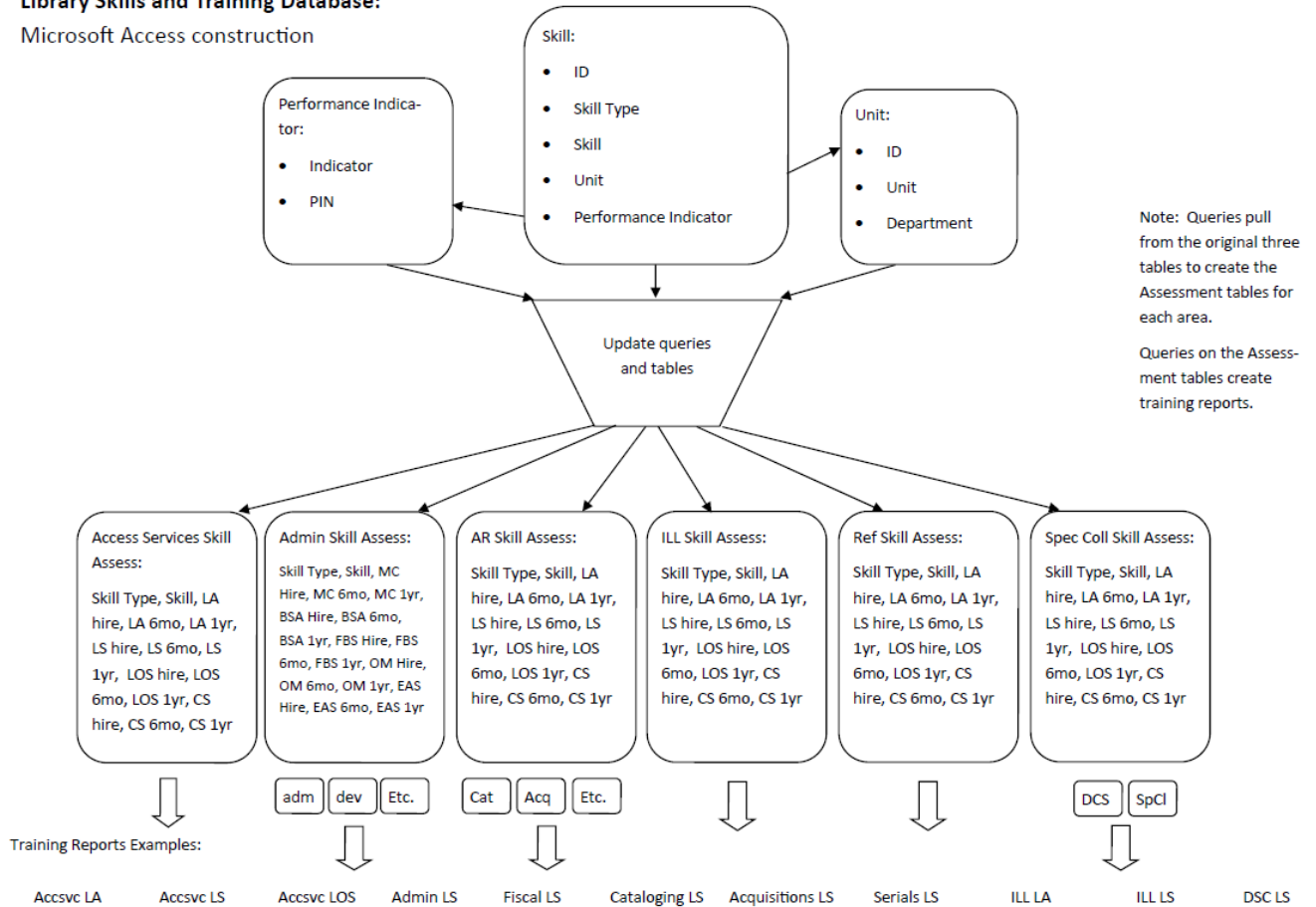
7/7/2011

ID	SkillType	Skill	Unit
110	Applied Knowledge	050	Cataloging
111	Applied Knowledge	090	Cataloging
127	Applied Knowledge	Account Research	Access Services
222	Applied Knowledge	ADA	AllLibrary
63	Applied Knowledge	Affect of Humidity on Different	Preservation
62	Applied Knowledge	Affect of Temperature on Differ	Preservation
82	Applied Knowledge	Arriving	Acquisitions
112	Applied Knowledge	Assign Subject Headings (LC)	Cataloging
91	Applied Knowledge	Assigning Dewey	Cataloging
92	Applied Knowledge	Assigning Library of Congress	Cataloging
68	Applied Knowledge	Attention to Detail	AllLibrary
141	Applied Knowledge	Authentication	Electronic Resources
98	Applied Knowledge	Bibliographic Changes	Serials
99	Applied Knowledge	Binding	Preservation, Serials
54	Applied Knowledge	Binding Practices	Preservation
130	Applied Knowledge	Book Search Processes	Access Services, Interlibrary Loan
228	Applied Knowledge	Calendar Maintenance/ Schedul	Access Services, HR/Admin, Building Se
113	Applied Knowledge	Cataloger's Desktop	Cataloging
100	Applied Knowledge	Ceased Titles	Serials
101	Applied Knowledge	Check-In	Serials
133	Applied Knowledge	Circulation	Access Services, Interlibrary Loan
102	Applied Knowledge	Claiming	Serials
159	Applied Knowledge	Cleaning Mold from Books	Preservation
69	Applied Knowledge	Collaboration	AllLibrary
137	Applied Knowledge	Collection Analysis	Cataloging, Acquisitions, Serials, Acces
138	Applied Knowledge	Collection Management	Cataloging, Acquisitions, Serials, Electr
45	Applied Knowledge	Compiling Statistics	AllLibrary
234	Applied Knowledge	Composition	HR/Admin
39	Applied Knowledge	Consortial agreements	Acquisitions, Serials, Electronic Resour
163	Applied Knowledge	Construction of Protective Hous	Preservation
142	Applied Knowledge	Contacting Vendors	Electronic Resources
158	Applied Knowledge	Controlling Environment	Preservation
19	Applied Knowledge	Customer Interactions	AllLibrary
20	Applied Knowledge	Customer Phone Service	AllLibrary
21	Applied Knowledge	Customer Problem Resolution	Access Services, Interlibrary Loan, HR/
22	Applied Knowledge	Customer Service Trainer	Access Services, HR/Admin
114	Applied Knowledge	Database Clean-up	Cataloging
32	Applied Knowledge	Database Navigation	AllLibrary
154	Applied Knowledge	Deacidification of Documents	Preservation
151	Applied Knowledge	Delivery	Cataloging, Access Services, Interlibrar
134	Applied Knowledge	Desk Operations	Access Services, Interlibrary Loan
51	Applied Knowledge	Develops Procedures	AllLibrary
33	Applied Knowledge	Dewey Decimal Classification	AllLibrary
168	Applied Knowledge	Digital Archiving	Digital Collections

## Database Illustrations

### Library Skills and Training Database:

Microsoft Access construction



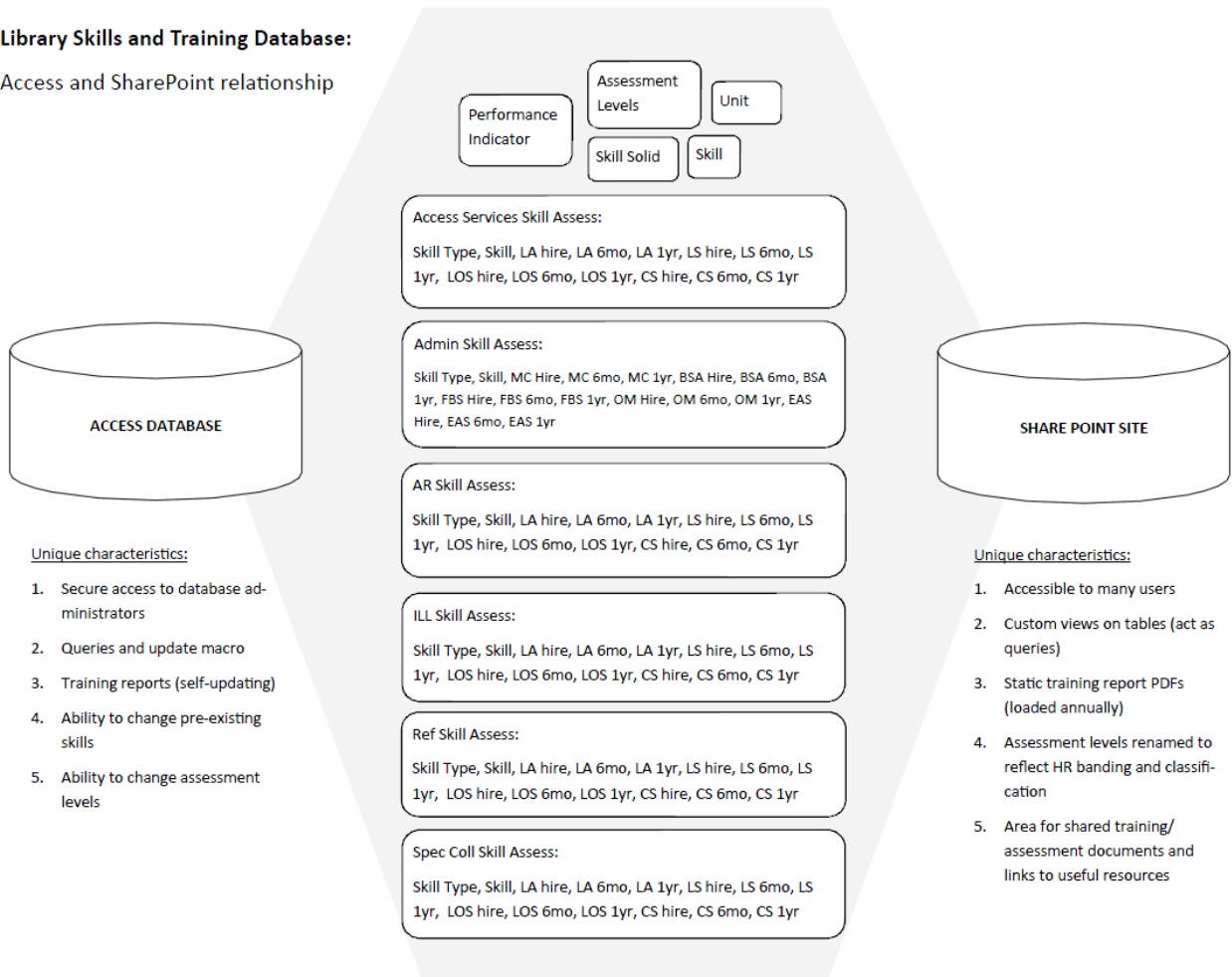
Note: Queries pull from the original three tables to create the Assessment tables for each area.

Queries on the Assessment tables create training reports.



## Library Skills and Training Database:

Access and SharePoint relationship



## Appendix C: Core Competencies and Performance Indicators (Document under Separate Cover)



University of South Florida

Tampa Library

# PERFORMANCE INDICATORS

*Developed by the USF Library Core Competencies Task Force  
in collaboration with USF Talent Management  
for use in Annual Staff Evaluations and Periodic Reviews.*

**Adopted: November 22, 2010**

**Updated: May 31, 2011**

**Library Task Force:**

- Jessi Hurd, Library Operations Manager – Academic Resources
- LeEtta Schmidt, Library Operations Manager – Academic Services/InterLibrary Loan
- Dennis Smith, Library Operations Manager – Academic Services/Access Services
- Nancy Jacobs-Dilley, Office Manager – Administration – Human Resources

**USF Talent Management:**

- Gabi Harmon, Learning & Development Facilitator

**With Cooperation From:**

- Barbara Lewis, Coordinator of Digital Services

## Appendix D: Training Reports

### Skills Inventory Questionnaire Access Services Sample

Level	Title	Description
0	Unaware	Have no knowledge of this skill and am unable to perform tasks that require this skill
0+	Unaware transitional	Have some knowledge but unable to perform task without further training
1	Aware	Have knowledge of this area and am familiar with concepts related to the skill but cannot perform task without supervision and/or further training
1+	Aware transitional	Am currently being trained in this area, but cannot perform the task without supervision
2	Functional	Able to apply knowledge and skills to routine work, but occasionally need help with exceptions to rules and problems
2+	Functional transitional	Able to perform task with little help or guidance from others, and need less help with rule exceptions and problems
3	Proficient	Have extensive knowledge in this area and am able to work through most problems and complex issues with help or guidance from others
3+	Proficient transitional	Am able to train others in this area
4	Expert	Have extensive knowledge and experience in this area and act as a coach and mentor to others helping to solve difficult and complex problems


Applied Knowledge	Account Research	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	ADA	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Attention to Detail	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Book Search Processes	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Calendar Maintenance/ Scheduling	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Circulation	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Collaboration	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Collection Analysis	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Collection Management	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Compiling Statistics	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Customer Interactions	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Customer Phone Service	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Customer Problem Resolution	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Customer Service Trainer	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Database Navigation	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Delivery	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Desk Operations	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Develops Procedures	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Dewey Decimal Classification	0	0+	1	1+	2	2+	3	3+	4

Applied Knowledge	TBLC Delivery	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Time Management	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Training	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Transport Operations	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	University Policy	0	0+	1	1+	2	2+	3	3+	4
Concepts	Collections	0	0+	1	1+	2	2+	3	3+	4
Concepts	Confidentiality	0	0+	1	1+	2	2+	3	3+	4
Concepts	Copyright	0	0+	1	1+	2	2+	3	3+	4
Concepts	Document Delivery	0	0+	1	1+	2	2+	3	3+	4
Concepts	E-Content	0	0+	1	1+	2	2+	3	3+	4
Concepts	First Aid	0	0+	1	1+	2	2+	3	3+	4
Concepts	ILS	0	0+	1	1+	2	2+	3	3+	4
Concepts	Interlibrary loan	0	0+	1	1+	2	2+	3	3+	4
Concepts	MARC record	0	0+	1	1+	2	2+	3	3+	4
Concepts	OPAC/Website	0	0+	1	1+	2	2+	3	3+	4
Concepts	Patron Privacy	0	0+	1	1+	2	2+	3	3+	4
Equipment	Copier	0	0+	1	1+	2	2+	3	3+	4
Equipment	Golf Cart	0	0+	1	1+	2	2+	3	3+	4
Equipment	Microform Scanner	0	0+	1	1+	2	2+	3	3+	4
Equipment	Scanner	0	0+	1	1+	2	2+	3	3+	4
Equipment	Vehicles	0	0+	1	1+	2	2+	3	3+	4
Systems	Access	0	0+	1	1+	2	2+	3	3+	4
Systems	Acrobat	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) ALEPH Billing / Account Recon	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Cataloging Module	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Circulation Module	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Circulation Operations	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Course Reserve Operations	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Item Records Operations	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Patron Billing Operations	0	0+	1	1+	2	2+	3	3+	4

Applied Knowledge	Disaster Planning	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Fine Resolution	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Fire Regulations	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Hiring and Recruitment	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Item Dispute Processes	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Knowledge of Budget structure	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Knowledge of institutional policies/practices	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Knowledge of state & national policies/practices	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Laptops Equipment	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Library of Congress Classification	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Library Policy	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Mail	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	OCLC/WorldCat	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Organization	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Peer Review Process	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Performance Assessment / Mentoring	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Project Management	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	PRONTO	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Research	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Reserves / Hold Recall / ILL	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Return Operations	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Scheduling / Work force planning	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Shelf Reading / Collection Mgt	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Shelving (Classification&Collection)	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Spatial Planning	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Staff Supervision	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Student Assistants	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	SuDoc Classification	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Supplies	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	System Configuration	0	0+	1	1+	2	2+	3	3+	4

Systems	ALEPH (ILS) Patron Records Operations	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) System Configuration	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) System Troubleshooting	0	0+	1	1+	2	2+	3	3+	4
Systems	ALEPH (ILS) Uborrow	0	0+	1	1+	2	2+	3	3+	4
Systems	Banner Billing	0	0+	1	1+	2	2+	3	3+	4
Systems	Excel	0	0+	1	1+	2	2+	3	3+	4
Systems	Explorer/other browsers	0	0+	1	1+	2	2+	3	3+	4
Systems	FAST	0	0+	1	1+	2	2+	3	3+	4
Systems	GEMS	0	0+	1	1+	2	2+	3	3+	4
Systems	ILLiad Document Delivery	0	0+	1	1+	2	2+	3	3+	4
Systems	ILLiad WebCirc	0	0+	1	1+	2	2+	3	3+	4
Systems	Macro Express	0	0+	1	1+	2	2+	3	3+	4
Systems	Operating Systems	0	0+	1	1+	2	2+	3	3+	4
Systems	Outlook	0	0+	1	1+	2	2+	3	3+	4
Systems	Power Point	0	0+	1	1+	2	2+	3	3+	4
Systems	Ticketing system	0	0+	1	1+	2	2+	3	3+	4
Systems	Time Clock	0	0+	1	1+	2	2+	3	3+	4
Systems	Word	0	0+	1	1+	2	2+	3	3+	4

## Skills Inventory Questionnaire Library Specialist Sample



### Academic Resources LS Skills Questionnaire

Friday, July 15, 2011 Employee Name: \_\_\_\_\_

Below, you will find a list of skills identified as important for library specialists in Academic Resources. Please use the assessment levels table here to rate yourself by circling the level next to each skill that best reflects your abilities.

Level	Title	Description
0	Unaware	Have no knowledge of this skill and am unable to perform tasks that require this skill
0+	Unaware transitional	Have some knowledge but unable to perform task without further training
1	Aware	Have knowledge of this area and am familiar with concepts related to the skill but cannot perform task without supervision and/or further training
1+	Aware transitional	Am currently being trained in this area, but cannot perform the task without supervision
2	Functional	Able to apply knowledge and skills to routine work, but occasionally need help with exceptions to rules and problems
2+	Functional transitional	Able to perform task with little help or guidance from others, and need less help with rule exceptions and problems
3	Proficient	Have extensive knowledge in this area and am able to work through most problems and complex issues with help or guidance from others
3+	Proficient transitional	Am able to train others in this area
4	Expert	Have extensive knowledge and experience in this area and act as a coach and mentor to others helping to solve difficult and complex problems

SkillType	Skill	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	050									
Applied Knowledge	090									
Applied Knowledge	ADA									
Applied Knowledge	Assign Subject Headings (LC)									
Applied Knowledge	Assigning Dewey									
Applied Knowledge	Assigning Library of Congress									
Applied Knowledge	Attention to Detail									
Applied Knowledge	Authentication									
Applied Knowledge	Bibliographic Changes									
Applied Knowledge	Binding									
Applied Knowledge	Cataloger's Desktop									
Applied Knowledge	Ceased Titles									
Applied Knowledge	Check-In									
Applied Knowledge	Claiming									
Applied Knowledge	Collaboration									
Applied Knowledge	Collection Analysis									
Applied Knowledge	Collection Management									
Applied Knowledge	Compiling Statistics									
Applied Knowledge	Consortial agreements									
Applied Knowledge	Contacting Vendors									

SkillType	Skill									
Applied Knowledge	Customer Interactions	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Customer Phone Service	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Database Clean-up	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Database Navigation	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Delivery	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Develops Procedures	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Dewey Decimal Classification	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Disaster Planning	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	E-Books	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	E-resources	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	ERM	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Fire Regulations	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Florida Documents	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Functional Knowledge of RDA	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Functional Knowledge of AACR2	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Global Changes	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Government Documents	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Grant writing	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Hiring and Recruitment	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Holdings Records	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Invoices	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Item Records	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Knowledge of licensing and negotiating w/vendors	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Labels	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Library of Congress Classification	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Library Policy	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Mail	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Media	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Metalib/Metadata	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Naming Conventions	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	New Titles	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	OCLC/WorldCat	0	0+	1	1+	2	2+	3	3+	4



SkillType	Skill									
Applied Knowledge	Ordering	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Organization	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Original	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Peer Review Process	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Performance Assessment / Mentoring	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Process Renewals	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Project Management	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Record Loads	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Registering e-journal titles	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Reinstated Titles	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Research	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Scheduling / Work force planning	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	SFX	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Staff Supervision	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Stripping	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Student Assistants	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Subject	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	SuDoc Classification	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Supplies	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Theses	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Time Management	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Title Changes	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Training	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Trouble shoot access issues	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Understanding of DOI structure	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	University Policy	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Withdrawing / Deleting	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Withdrawn Titles	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	WorldCat Assessment	0	0+	1	1+	2	2+	3	3+	4
Concepts	Collections	0	0+	1	1+	2	2+	3	3+	4
Concepts	Confidentiality	0	0+	1	1+	2	2+	3	3+	4
Concepts	Copyright	0	0+	1	1+	2	2+	3	3+	4
Concepts	E-Content	0	0+	1	1+	2	2+	3	3+	4

SkillType	Skill										
Concepts	First Aid	0	0+	1	1+	2	2+	3	3+	4	
Concepts	ILS	0	0+	1	1+	2	2+	3	3+	4	
Concepts	MARC record	0	0+	1	1+	2	2+	3	3+	4	
Concepts	OPAC/Website	0	0+	1	1+	2	2+	3	3+	4	
Concepts	Patron Privacy	0	0+	1	1+	2	2+	3	3+	4	
Equipment	Copier	0	0+	1	1+	2	2+	3	3+	4	
Equipment	Scanner	0	0+	1	1+	2	2+	3	3+	4	
Equipment	Vehicles	0	0+	1	1+	2	2+	3	3+	4	
Systems	Access	0	0+	1	1+	2	2+	3	3+	4	
Systems	Acrobat	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) Acquisitions/Serials Module	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) Cataloging Module	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) Item Records Operations	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) Physical Processing	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) Print Serials Check In	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) System Configuration	0	0+	1	1+	2	2+	3	3+	4	
Systems	ALEPH (ILS) System Troubleshooting	0	0+	1	1+	2	2+	3	3+	4	
Systems	Excel	0	0+	1	1+	2	2+	3	3+	4	
Systems	Explorer/other browsers	0	0+	1	1+	2	2+	3	3+	4	
Systems	GEMS	0	0+	1	1+	2	2+	3	3+	4	
Systems	Macro Express	0	0+	1	1+	2	2+	3	3+	4	
Systems	Operating Systems	0	0+	1	1+	2	2+	3	3+	4	
Systems	Outlook	0	0+	1	1+	2	2+	3	3+	4	
Systems	Power Point	0	0+	1	1+	2	2+	3	3+	4	
Systems	Ticketing system	0	0+	1	1+	2	2+	3	3+	4	
Systems	Time Clock	0	0+	1	1+	2	2+	3	3+	4	
Systems	Word	0	0+	1	1+	2	2+	3	3+	4	

## Appendix E: Skills Training Plan Forms

### Learning Plan Development

Staff development is critical for employee and University growth. Planning for development with one's manager is essential in identifying the knowledge and skills necessary to achieve department and organization objectives.

Create a learning Plan

The individual learning plan will identify the areas you most want to develop and the most effective methods to acquire skills and improve performance.

1. Make a list of developmental needs and review with your supervisor. For example:
  - I want to speak up more in meetings and make a contribution in problem solving and in expressing what I need to accomplish my goals.
  - I want to be more confident in my presentation abilities in small groups or when presenting status reports to my manager and to clients.
  - I need to build a more productive relationship with a coworker that I usually disagree with.
  - I need to learn the latest upgrades to the current business systems. I need skills in the areas of budgeting and IT.
  - I am becoming more responsible for several administrative processes in our area. I could use better skills in improving the flow of paper through our department.
2. Develop learning objectives based on your developmental needs:
  - Demonstrate the ability to use effective communication skills in staff meetings, and in gaining cooperation with peers.
  - Successfully contribute to group problem solving by applying a more effective methods of analyzing root causes and generating solutions.
  - Apply skills in active listening and resolving disagreements in productive manners.
  - Increase efficiency in assembling information for displaying data for regular reports available in the business system.
  - Demonstrate skills in administrative processes.
3. Consider the variety if resources and actions available to accomplish learning objectives. These include:

#### Assignments

- A project with senior level
- Job scope increase or change
- Start-up project
- Key presentation
- Represent manager
- Benchmarking other companies
- Fix-it project
- Project team leader
- Project in another area

#### Coaching

- Specific ongoing behavioral coaching
- Practice presentation
- Watch role models
- Refer them to other colleagues as advisers
- Schedule follow-up meetings

#### Education

- Courses
- Self-study
- Books
- Periodicals
- Videos
- Audios
- Computer Based
- Professional associations

4. Set a time frame within which to achieve each learning objective.
5. Criteria for Success – How will you know when you have achieved your goal? How would you like to evaluate your success? For example:
  - I will make a clear presentation that gains the support and cooperation of my peers.
  - I will contribute to the successful implementation of solutions that improve outcomes in agreed areas.
  - I will appreciate the positive contributions individuals make and implement strategies to reduce distractions and minor annoyances in the work environment.
  - I will come back from functional training programs and implement the appropriate number of strategies to improve performance.
6. List the persons who will serve as a resource to observe and give you feedback on your development.
7. Learning Plan Review – Establish quarterly meeting dates and record results and agreements as a result of the meetings.

## Learning Plan

<b>Name:</b>	<b>Area:</b>
<b>Date:</b>	<b>Name of Supervisor:</b>

<b>Learning Objective:</b>		
<b>Actions</b>	<b>Target Date</b>	<b>Completed</b>
<b>Criteria for Success:</b>		

<b>Learning Objective:</b>		
<b>Actions</b>	<b>Target Date</b>	<b>Completed</b>
<b>Criteria for Success:</b>		

<b>Learning Objective:</b>		
<b>Actions</b>	<b>Target Date</b>	<b>Completed</b>
<b>Criteria for Success:</b>		

<b>Learning Objective:</b>		
<b>Actions:</b>	<b>Target Date</b>	<b>Completed</b>
<b>Criteria for Success:</b>		

<b>Learning Objective</b>		
<b>Actions:</b>	<b>Target Date</b>	<b>Date Complete</b>
<b>Criteria for Success:</b>		

<b>Learning Objective: Orientation</b>		
<b>Actions: Check list for new employee, supervisor, and HR</b>	<b>Target Date</b>	<b>Date Complete</b>
<b>Criteria for Success:</b>		

People who will observe you and give feedback:

_____	_____
_____	_____

Learning Plan Review: \_\_\_\_\_% of activities completed as of: \_\_\_\_\_ (date)

Quarterly Review Meetings

Meeting	Date	Notes

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Manager's Signature: \_\_\_\_\_ Date: \_\_\_\_\_