

You Should Know This By Now

Getting Your Staff Tech Skills on the Same Page



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Roadmap for this session ...



- Why we created a competency program
- Organization
- Planning
- Answering all the questions
- Involving the staff
- How it turned out
- How we maintain the program



First Attempt

2008: The library launches a new online help desk for staff tech issues

Too many questions ...

... for one IT person ...

... train the staff!

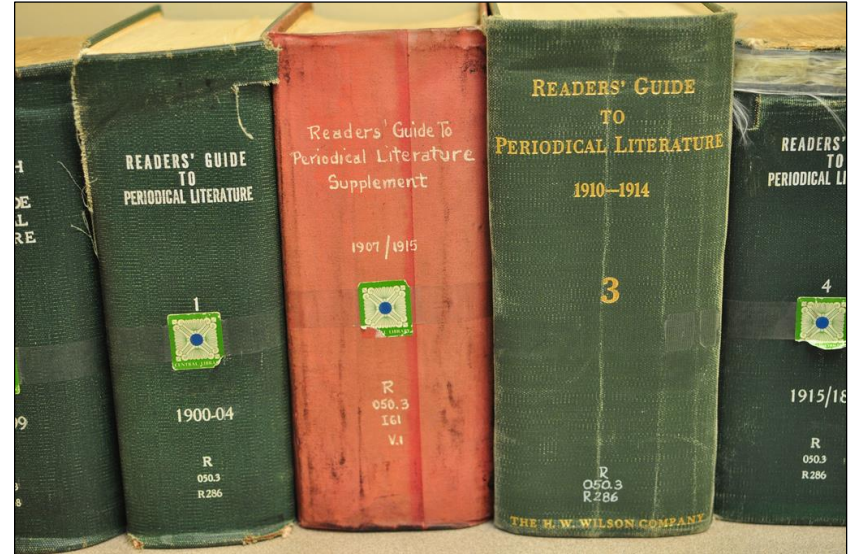


A good old-fashioned literature review



Most helpful resource on competencies:

*Library Technology Report:
Technology Competencies and
Training for Libraries (ALA 2007)*
by Sarah Houghton-Jan



Why do we want tech competencies?



- Get staff tech skills on the same page
- Communicate management expectations
- Create a culture of learning
- Relieve the “Tech Pack Mules”
- Improve customer service



Our definition of competency



Competencies are the abilities, qualities, strengths, and skills required for the success of the employee and the organization.

Why aren't we competent?



Lack of training

Unwillingness to learn

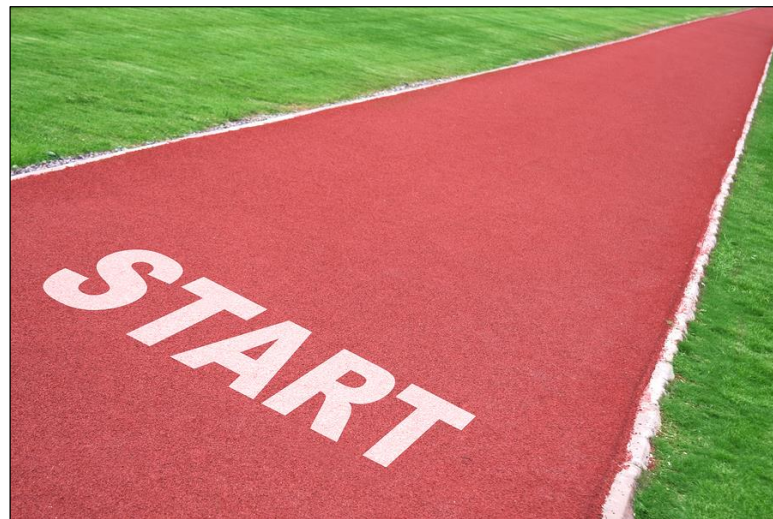


**A competency program
addresses both issues.**

Initial thoughts and goals



- Involve the entire staff
- Don't rush the timing
- Add "teeth"
- Prepare for staff training
- Be positive



First steps



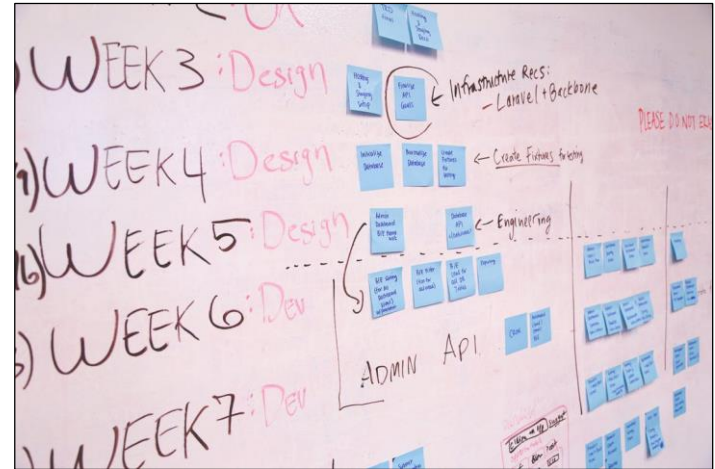
1. Create a purpose statement
2. Develop a step-by-step plan
3. Get input from supervisors



The Plan – Year One

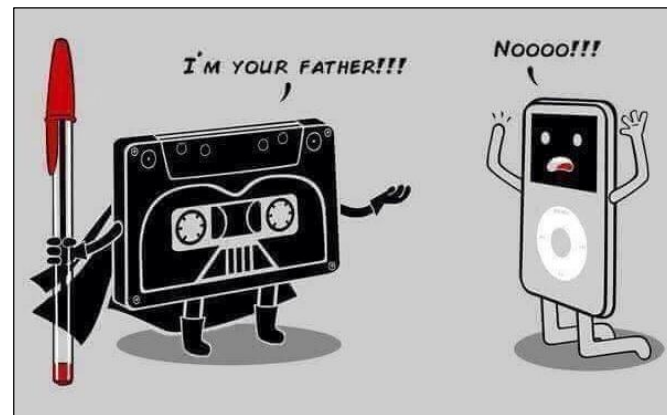


1. Develop competencies for all positions
2. Complete pre-assessment for all employees
3. Train where necessary
4. Post-test where necessary
5. Include competency requirements in job descriptions and evaluations



What constitutes tech?

- Computers
- Phones
- Fax machines
- Copiers
- Scanners
- AV equipment
- Polaris
- Email
- Microsoft Office
- Internal wiki
- Timesheets
- Specific vendor software (e.g. B&T)



How specific should the comps be?



- Very!
- Measurable and unambiguous
- Do they know it or not?

Examples of Polaris competencies:

- Can view a patron's hold list
- Knows difference between grace period and free days

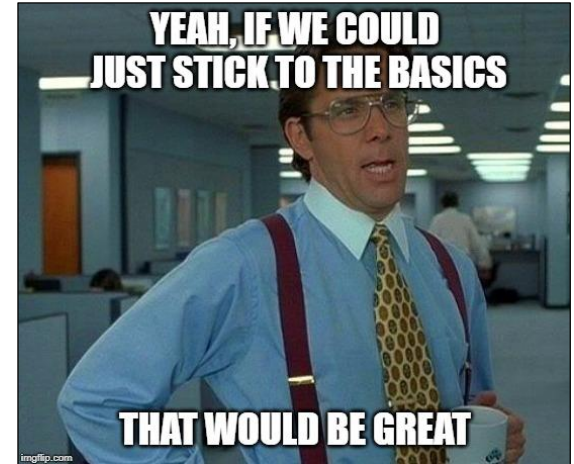


What is “core”?



There can be A LOT of discussion on this topic.

- Start with the job description
- Minimum skills required for the job
- Frequency of the tasks inconsequential
- Different branches, different practices



What documentation do we already have?



Campbell County Public Library has LOTS of documentation

- Job descriptions
- New hire orientation checklists
- Policy manuals
- Training manuals
- Department manuals/guidelines

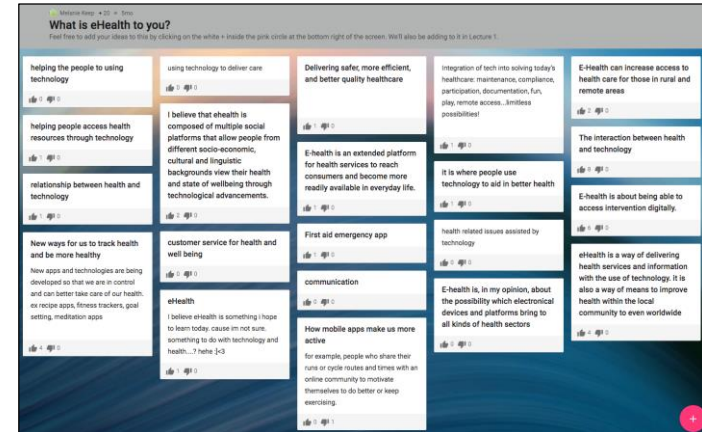


How do we involve the entire staff?



Padlet

- Virtual wall for simultaneous interaction
- Employees post in real-time
- Allows anonymity
- Consolidated results



Example of virtual wall in Padlet

Finalizing the competencies

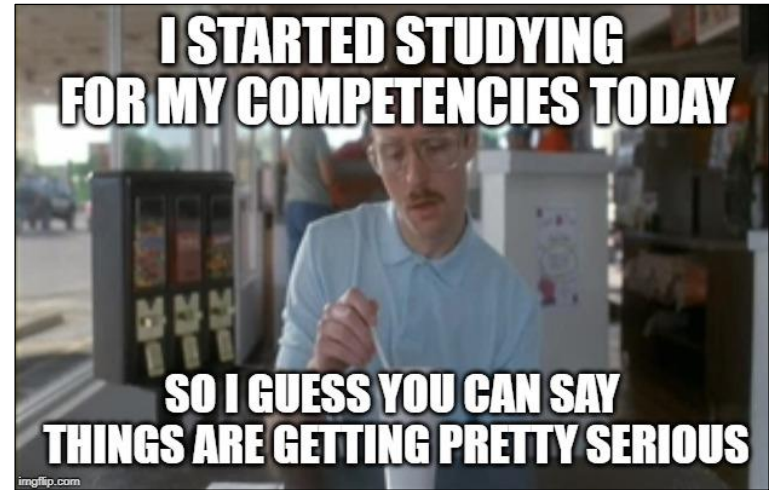


- Created a master list
- Created forms for each position
 - Page
 - Circulation Assistant
 - Reference Assistant
 - Etc.....
- Supervisors reviewed



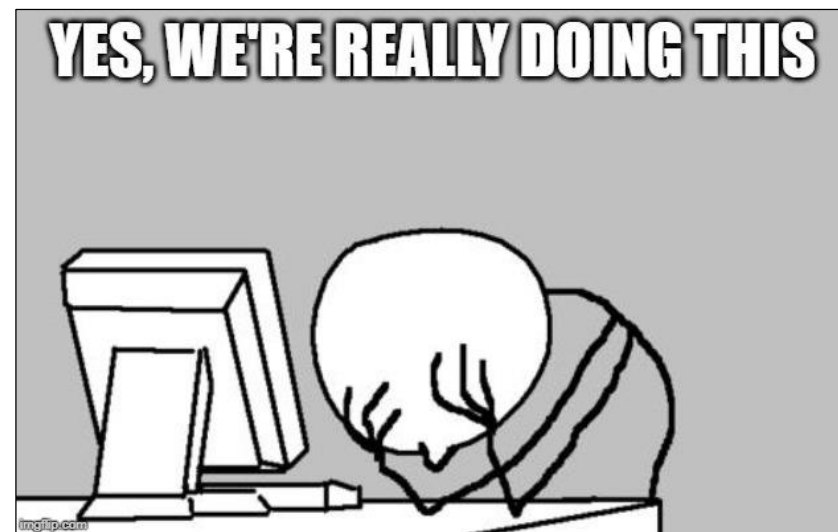
Preparing for the pre-assessment

- Does anyone want to form a study group?
- Two (2) months to prepare
- Staff trained each other
- No initial consequences



Prepping the supervisors

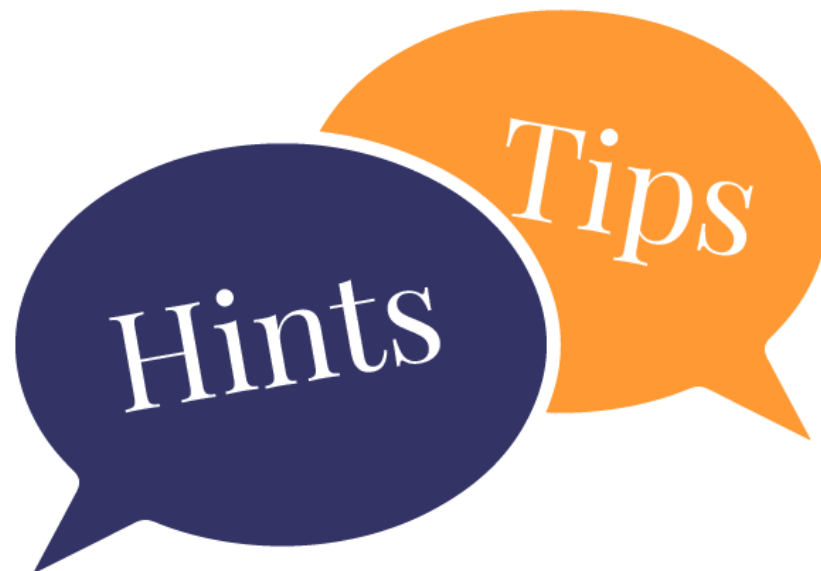
- Don't rush the process
- Each competency should be performed/discussed
- Watch the employee closely
- Do not prompt/help the employee
- Allow time for each competency



Best practices



- Have your own review first
- Provide a calm environment
- No shortcuts!
- Use your ILS training server
- Take it slow



Example of our competency form



Patron Services Assistant Core Technology Competencies Checklist		Employee Name: _____	Date started: _____	Select assessment period _____ Pre _____ Post
		Supervisor Name: _____	Date completed: _____	
Scoring: A. Number of items for which the employee needs further training: _____ B. Number of pages in this checklist: _____ Pass: The number on line A is less than or equal to the number on line B. Fail: The number on line A is greater than the number on line B. This employee has (check one): PASSED _____ FAILED _____			Please sign when checklist is completed: Employee _____ Supervisor _____ Manager _____	
Place in a checkmark in each box when completed		Comments		
✓	1.	Timesheet Software		
	a.	Can reset forgotten password for timesheet		
	b.	Can enter regular hours and holiday hours		
	c.	Can locate accumulated vacation, sick leave, or PTO		
	d.	Can locate pending and approved time off requests		
	e.	Can submit time off requests		
	f.	Can approve individual timesheet		
	g.	Can reset forgotten password for pay stubs		
	h.	Can retrieve electronic pay stubs and W2s		
✓	2.	Email		
	a.	Can open, create, reply, forward, send, delete email		
	b.	Can open other folders (e.g. sent, deleted)		

Incentives and Scoring

- Make it competitive!
- Make it rewarding!
- Passing score = 95%
- 5 employees failed the 1st round
- All passed 6 months later



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JANE-CLARK.TUMBLR

Some common trouble spots

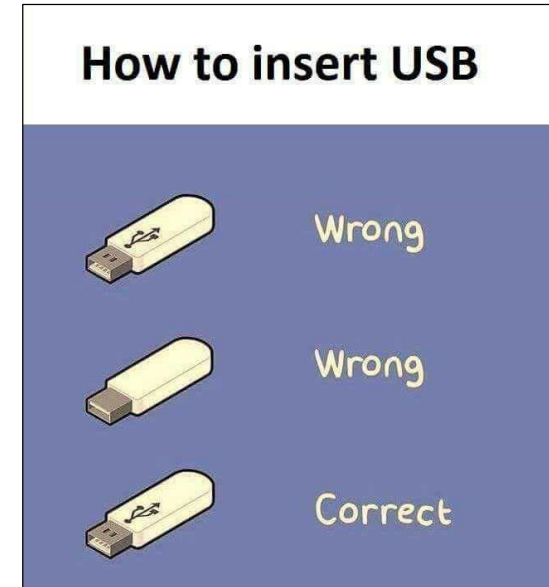
- Saving files to a network drive
- Logging into the staff wiki
- Inactivating a hold request
- Changing toner in copier
- Sending a fax
- Connecting to staff wifi
- Checking voicemail



Follow-up Training



- Created training videos
 - Phone system
 - Print/scan/fax
 - Wiki
 - Saving files to a network drive
- One-on-one, supervisor/employee
- Litmos learning management system



Penalties : The Serious Stuff

- Divided opinions
- Should we terminate?
- Yes, says library administration
- Has not happened (yet)



Road to termination

Fail pre-assessment



Fail (1st) post-assessment



Performance improvement plan



Fail second (2nd) post-assessment



Immediate termination

Things We Learned



- Repeat the process every 2 years
- Annually is too often
- Maintenance is easier
- Remove old, add new
- Create new lists when new positions are added



Ideas for the future

- Automate
 - Move the process online
 - Easier management
 - Results easily tabulated
- Incentivize
 - Create a second, optional tier
 - Encourage staff to achieve more
 - Reward success



Summary of the process



1. Create a purpose statement
2. Allow entire staff to participate
3. Develop a system to assess staff members
4. Decide if you're going to use a pass/fail system
5. Provide training
6. Develop a schedule for maintenance and future assessments

Presentation documents



- PowerPoint presentation
- Slide notes
- Sample competency form
- Purpose statement and bibliography
- Competencies manual for personnel (policy and procedure)