TEAM ILL:

Training, Engaging & Motivating Student Assistants

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Serials/Interlibrary Loan Librarian
Nazareth College
Rochester, New York
Agenda

• ILL at Nazareth College
• Training
• Motivating
• Engaging
• Future librarians
• Q/A - discussion
ILL @ Naz: The Changing Team

1991

- Serials (1700 print)
- Interlibrary Loan (6900 transactions)
- 1 FT Librarian
- 1 FT Support Staff
- 5 Student Assistants (30 hrs)
- Open 40 hrs week

1997

- Serials (1700 print + e-journals)
- Interlibrary Loan (9000 transactions)
- **Course Reserve**
- Open 103.5 hrs week
- 1 FT Librarian
- 2.5 FT Support Staff
- **40 Student Assistants (250 hrs)**
ILL @ Naz:
Who we are now

• Back to Serials/ILL (plus Doc Del)
• 65 hrs per week (+ Sundays)
• 2 FT Librarians (split between ILL & Serials)
• 18 Student Assistants
• ILL Stats = 35,000 requests
Training:
The Four Step Game Plan

1. Team Profile
2. Orientation
3. Training & Development
4. Ways to Simplify the "game"
Step 1: Team Profile

Who’s really on your team?
• College aged - between 17 & 22
• First time away from home
• First job
• First time really getting to know a library inside and out
Step 2: Orientation to the Game

• First impressions are everything!

• Developing a positive attitude toward the library and the job.

• “Oriented workers do a better job and stay with the library longer than those who are not.”
Orientation

- Orientation at the Job Fair
- Who will Train?
- The Grand Tour!
- Policies & Procedures
Step 3: Training & Development

Divide job into “have to know”:
- Now
- Soon
- One of these days

Track your training

Types of training
- Group
- One-on-one
- Peer-to-peer
- Crib sheets, Training Videos, Tip of the Week
Training & Development:
The Whole Team Approach

Advantages
• Can engage in group activities/role play
• Icebreakers
• Fosters development of transactive memory systems among group members
• One session/less voice loss 😊

Challenges
• Info overload
• Some of the team may get lost
Training & Development: One on One

Advantages

- Individualized
- Hands-on
- Ability to performance check
- Immediate clarification

Challenges

- Need to track closely who learned what
- Number of Students $\times$ Training = Lots of Time
- Loss of voice!
Advantages

- Learning process facilitated by a more experienced student assistant
- I know where you’re coming from
- Little to no librarian lingo
- More relaxed atmosphere, easier to ask a peer question

Challenges

- How well trained is the trainer?
Extending your training: *Crib Sheets*

- When no one is around
- Combine visuals with texts
- Less is more
- Easily accessible & portable

**STEP 4 – Lending**

**Returning Books & Media**

In Millennium

1. <click> **Check In**
2. Scan the book barcode with the barcode scanner.
3. <click> **Close** icon when finished.

In ILLiad

1. Under **Lending** Tab, <click> **Lending Returns**
2. Type the Transaction Number & <hit> **ENTER** (on the keyboard)

**Take ALL BOOKS & MEDIA up to the MAIN CIRCULATION DESK**
Extending your training: *Instant Replay!*
Extending your training:

**Tip of the Week**

- Clean out the **copier scan folder** so you can find your docs

**ALERT!**

- New **Article Exchange workflow**!

Check it out!

- **New “In-Library-Use-Only” boxes to use!**

Remember to <click> **Batch Scan Mode** on the microfilm to scan multiple pages.
Tracking training

• Unique ILLiad Accounts
• Training check list
• Impromptu quizzing
  – Holiday party contests
    • Silly with the serious

1) When checking a borrowing item in a pop-up message states “the user is blocked”. What do you do?

  a) Laugh and send the book back to the Lending library.
  b) Cancel the check-in process and give it to a supervisor.
  c) Override the block and process as normal. It’s just an ILLiad error.
Step 4: Simplify the Game!

If I weren’t here tomorrow...

Is your workflow intuitive?

• Make your Office and ILLiad work for you & workflow friendly!

“Everything should be made as simple as possible, but not simpler.”

- Albert Einstein -
Organizing Office Space:
How does your work flow?

1. Designate a starting point for all actions.
2. Where do they go next?
3. Where do they end?
Simplify the (ILLiad) game

Make ILLiad work for you

a) Intuitive Pick-tickets
b) Mailing Shipping Methods
c) Easy Solutions
d) Rules to play by
e) Custom Holdings
## a) Intuitive Lending Pick-tickets

### Loans by Nazareth College (XNC)

<table>
<thead>
<tr>
<th>ILLN #</th>
<th>Lending String</th>
<th>Charge</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>234567</td>
<td>XNC,TXT,BAL,PFL</td>
<td>$15.00</td>
<td>3/12/2012</td>
</tr>
<tr>
<td>300715</td>
<td>XNC,RFR,FYM,NYP,XQM</td>
<td>$0.00</td>
<td>3/12/2012</td>
</tr>
</tbody>
</table>

**Title:** Fundamental statistics for the behavioral sciences
**Author:** Howell, David C.
**Loan Edition:** 6th ed.
**CALL #** 300.72 How
**Shelves/Main Level CHECK SHELVES**
**XNC TN:** 334611

**Info for Lending Libraries, including your TN!**

**Nazareth ILL Office:** (585) 389-2184 or 2185
nazill@naz.edu

**Return to:**
Nazareth College
Lorette Wilmot Library - ILL
4245 East Ave/PO Box 18950
Rochester NY 14618-0950

**Mail to:**
University of Libraries
ILL DEPT
3420 East St.
Somewhere, NY 12345-6789

**Illiad Millennium**

### Loans by Nazareth College (XNC)

<table>
<thead>
<tr>
<th>ILLN #</th>
<th>Lending String</th>
<th>Charge</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>964756789</td>
<td>XNC,TXT,BAL,PFL</td>
<td>$15.00</td>
<td>3/12/2012</td>
</tr>
<tr>
<td>96496560</td>
<td>XNC,RFR,FYM,NYP,XQM</td>
<td>$0.00</td>
<td>3/12/2012</td>
</tr>
</tbody>
</table>

**Title:** The Black Death: the great mortality of 1348-1350: a brief history with documents
**Author:** Aberth, John.
**Loan Edition:**
**CALL #** 614.5732 Abe
**Shelves/Main Level CHECK SHELVES**
**XNC TN:** 334598

**Info for our students.. What is being requested**

**Nazareth ILL Office:** (585) 389-2184 or 2185
nazill@naz.edu

**Return to:**
Nazareth College
Lorette Wilmot Library - ILL
4245 East Ave/PO Box 18950
Rochester NY 14618-0950

**Mail to:**
RRLC DEL - SUNY BROCKPORT
BROCKPORT NY 14420-2995

**ILLiad Millennium**
Intuitive slips
b) Mailing Shipping Methods

You could select this way, every time, or...
...let ILLiad remove the guesswork...

**Note:** Values for drop down are entered in the BillingShippingFees table in the Customization Manager. If you don’t charge for shipping, enter $0.00 in $$ amount.

Add this to your Print Templates:

«LenderAddresses_DefaultShippingMethodLoa» to «LenderAddresses_LibraryName»
Smart Addresses!
c) Easy solutions

2-in-1 borrowing ticket
Easy solutions
d) Rules to play by

Routing Rules can be used to skip steps you may be *manually* skipping right now.

Upon updating to "**Awaiting Shipping Label Printing**" a routing rule moves them into "**Item Shipped**" status.

NOTE *: Don’t skip crucial OCLC updating steps.
Rules to play by

Routing Rules can be used to skip labor intensive steps.

Upon clicking “Customer Notified via Email” a routing rule moves them into “Checked Out to Customer” status.

NOTE *: Don’t skip crucial OCLC updating steps.
Look for Other Rules

• Rule of 5 Bypass Copyright Clearance
• Cancelled by Customer

(http://workflowtoolkit.wordpress.com/borrowing-workflow/routing-rules-borrowing/)

Think of other processes you may be ‘skipping’
(templates open...and you close them)
e) Custom Holdings

- **Shareill.org**
- **Policies Directory**
  - create your own!
  - [http://idsproject.org/usergroups/policiesdirectory.aspx](http://idsproject.org/usergroups/policiesdirectory.aspx)
- **Track them**
  - Excel Spreadsheet or
  - The OCLC Resource Sharing Custom Holdings Symbol Search
Training: 
*The Four Step Game Plan*

1. Team Profile
2. Orientation
3. Training & Development
4. Ways to Simplify the “game”
Motivation

When cookies aren’t enough
The “Points” System

• Each student begins with 4 points for perfect attendance. Points are subtracted for each unexcused absence/tardiness
• One point awarded for each semester worked
• One point earned for each semester a student serves as Snow Supervisor
• Score on Evaluation
Evaluations: Points for a Job Well Done

Students are evaluated on a scale of 1-5 on a number of work attributes and work skills.

<table>
<thead>
<tr>
<th>Work Attributes</th>
<th>Work Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependability</td>
<td>Customer Service</td>
</tr>
<tr>
<td>Initiative</td>
<td>Copier/Scanner</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Stack Knowledge</td>
</tr>
</tbody>
</table>
...and More Points

- Special projects
- Peer-to-peer training
- Student of the Month
MVP Awards

• Mini-trophies (paper awards) are given to students for service “above and beyond”

• Student of the month award – awarded by their peers for being most approachable and helpful

• Recognition on the Library’s blog

• A simple “thank you” at the end of a shift
Engaging Student Assistants

Making student assistants part of the team
Keeping the Lines of Communication Open

*Methods:*
- Weekly emails
- Facebook pages/Blogs

*Content:*
- Tip of the week
- Birthdays
- Special events
- Welcome new assistants
- Funny requests
- International requests
Office Décor

Making the Office Fun and Friendly

• Team Photos
• White Board
• Win-fail Wall
• The Map
• Home away from home
The Team “Roster”

• “Players” are identified, so students know their team mates
• Students’ interests, majors and hometowns are highlighted
• Discussion between students as well as between students and supervisors is promoted and encouraged
The White Board

- Tip of the week
- Reminders
- Milestones
- Welcome
- Welcome back
- Artist’s forum
The Win-Fail Wall

• Located above the copier/scanner – takes the drudgery out of scanning
• Selections have become a co-operative effort - “that’s a good one – put it up on the wall!”
• Updated often, to keep our students entertained
Home Away From Home

- The “Pet Wall” - Chase away the homesick blues with something warm and fuzzy
- It takes a village to raise an ILL fish!
- Bring in some home-made goodies – nothing says home like a chocolate chip cookie
- Holiday/end of semester/milestone parties
Where Has ILL Taken You?
Future ILL All-Stars
Questions & Discussion

• What works at your library?

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Lynne Marus – lmarus3@naz.edu
References


A Special Thanks to our Student Employees @ Naz, to Tracey Melville and Adam Traub, previous student assistants of RILS, and to Jeffrey Cannon for his work on the training videos.
Routing Rule to Skip Loan Labels

Skip printing shipping labels

<table>
<thead>
<tr>
<th>RuleNo:</th>
<th>(varies: can be placed anywhere in list)</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleActive:</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType:</td>
<td>Lending</td>
</tr>
<tr>
<td>TransactionStatus:</td>
<td>Awaiting Shipping Label Printing</td>
</tr>
<tr>
<td>MatchString:</td>
<td>t.RequestType = 'Loan'</td>
</tr>
<tr>
<td>NewProcessType:</td>
<td>Lending</td>
</tr>
<tr>
<td>NewTransactionStatus:</td>
<td>Item Shipped</td>
</tr>
<tr>
<td>RuleDescription:</td>
<td>Eliminates shipping label printing for loans</td>
</tr>
</tbody>
</table>

NOTE: To use this for articles, simply copy this rule and change the MatchString value to \textbf{t.RequestType}='Article' and the NewTransactionStatus to \textbf{Request Finished}. 

Routing Rule to skip “Check Out” items

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</tr>
</thead>
<tbody>
<tr>
<td>RuleActive:</td>
<td>Yes</td>
</tr>
<tr>
<td>ProcessType:</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus:</td>
<td>Customer Notified via E-Mail</td>
</tr>
<tr>
<td>MatchString:</td>
<td>t.RequestType = 'Loan'</td>
</tr>
<tr>
<td>NewProcessType:</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus:</td>
<td>Checked Out to Customer</td>
</tr>
<tr>
<td>RuleDescription:</td>
<td>Moves requests to Checked out to customer – eliminates individual Check Out process by staff</td>
</tr>
</tbody>
</table>
Skip printing return labels for Borrowing

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