

Unit Head Training

Unit heads play a critical role in the design and provision of Library services, the management of Library resources, the maintenance of Library facilities, the supervision of Library staff, and the mentoring and support of Library faculty. These guidelines:

1. outline the basic responsibilities and core competencies for all unit heads;
2. provide a framework for individual unit head position descriptions; and
3. guide the orientation of new unit heads and assessment of current unit heads.

Scope of Responsibility and Authority

While recognizing the unique characteristics and special mission of each unit within the Library, it is clear that all units essentially are service providers. In view of this, unit heads are charged with providing creative leadership for their units and with collegial collaboration with other units in the Library. This entails providing services to the unit's constituents as well as engaging the world beyond the walls of the University in areas that directly affect the unit's particular mission.

The unit head is ultimately responsible and accountable for the performance of the unit. This entails running the unit on a day-to-day basis, assuring provision, evaluation and monitoring of quality services, and mentoring and training the staff. Depending on the size of the staff, some of the duties listed in the Appendix may either be delegated to other faculty and staff within the unit or handled directly by the head. In units that contain other Library faculty, the division of subsidiary responsibility will be determined in a collegial manner, with the unit head having the final authority for job assignments. Without such authority the unit head could not be held responsible and accountable for the performance of staff within the unit.

Supporting Resources

The Library Administration is responsible for providing the infrastructure and resources necessary for unit functions. This entails support for all units by providing training and development opportunities, adequate staffing and facilities, and the tools to measure and evaluate services provided.

Responsibilities and Required Areas of Competence

The following list identifies key areas of competence and responsibility expected of unit heads. It is not meant to be comprehensive, but only suggestive of the most important skills and areas in which each unit head is expected to have basic competence. The list may include skills and responsibilities that do not fall within the scope of the current activities of individual units.

Personnel and Operations

Each unit head and designee should be familiar with the policies and procedures relating to the following or know where to go to find out this information, e.g.,

<http://www.library.uiuc.edu/administration/human/resources.html>

Library HR

- Vacation, sick leave, funeral leave, compensatory time and make-up time, floating holidays

https://nessie.uihr.uillinois.edu/cf/leave/index.cfm?Item_id=1403&rlink=1194

Reporting for AP and faculty <http://my.library.illinois.edu>

- Union contracts and work rules
https://nessie.uihr.uillinois.edu/cf/benefits/index.cfm?item_id=385&rlink=374
- Civil service policies and procedures
https://nessie.uihr.uillinois.edu/cf/policies/index.cfm?Item_id=390
- Disciplinary actions and relevant documentation

Performance Partnership Program <http://www.shr.illinois.edu/ler/ppp.html>

- Scheduling, flextime, breaks, lunch hours (guidelines for who sets work time)
- Merit pay for open range employees

Annual evaluations:

- Annual evaluations for faculty
<http://www.library.illinois.edu/committee/faculty/documents/index.html>
- Annual evaluations for Academic Professionals
http://www.provost.illinois.edu/communication/22/Comm22_attach1.pdf
http://www.provost.illinois.edu/communication/22/Comm22_attach2.pdf
- Annual evaluations for staff
<http://shr.illinois.edu/forms.html#P>
- [Exit interview for Graduate Assistants](#)

- [Goal setting and job descriptions for all staff](#)
- Reclassification and job audits
- Procedures concerning resignations and new hires
- JOYCE (Jazy Online Yellow Card Entry) Database for student employees **Needs link to instructions**
- Search Committee Documentation

Library Business office

- Time sheets for students and staff
 - Staff <http://www.library.uiuc.edu/administration/busoff/Payroll/stafftimesheet.html>
 - Students <https://apps.uillinois.edu/StudentFacSelfService.html>
- Time sheet instructions
http://www.library.illinois.edu/training/resources/new_employee/Web_time_sheet_instructions.doc
- Procedures for requesting graduate assistants, student hours, and replacing staff members through a request to the Budget Group
- Procedures for requesting faculty positions from the Executive Committee
- Budget overview
 - o Student wages – rates/estimate of hours
 - o Telecommunications – review of phone lines and calls made; fax lines, land lines; credit cards
 - o Travel budgets and reimbursements

<http://www.library.illinois.edu/administration/busoff/travel.html>

Understanding of basic business and financial rules and awareness of UIUC Library's policies and procedures for:

- Grants and contracts
- Gifts-in-kind

Library IT <http://www.library.illinois.edu/it/helpdesk/>

Logging a work request (OTRS system)

Employee services

Library email services

Library storage: G: and H: drive server shares

Off-campus access

Visitors

Staff computers

Public computers

Data & Computer security

System status

Systems for public and internal use

Training, and useful tools and tips

- Equipment requests
- Loaner equipment
- Software requests [List of standard software](#)
- Phone “lines” and listening devices (Facilities)
- Special requests process
- How to log a ticket
- List servs available
- Requesting email aliases
- Printing accounts
- Voyager accounts
- Lync accounts

- Updates for Staff Directory
- CMS editing
- Individual web pages
- Departmental web pages

Facilities

- Requesting use of meeting and instructional spaces
- Requesting furniture
- Emergency procedures
- Key requests and inventories
- OTRS requests
- Ordering supplies, activity code needed

Administrative Structure (Division Coordinator or AUL)

- Administrative Council
- Executive Committee
- Budget Group
- Committee work/appointments & elections (staff and faculty)
- Divisional structure and library organizational structure
<http://www.library.illinois.edu/staff/orgchart.html>
- Division web pages: (including other units in division)
- Division Coordinator Responsibilities
http://www.library.uiuc.edu/administration/services/policies/division_coordinator_responsibilities.html

- Divisional collection needs

Services

Each unit head and designee should be familiar with the policies and procedures relating to the following or know where to go to find out this information, e.g., <
<http://www.library.uiuc.edu/administration/services/planning.html>>

- Unit annual report guidelines
- Unit goal setting and planning
- Assessment
 - Statistical reporting
 - Measurement and evaluation of operations
- Instruction
 - User Education committee
 - Instructional Statistics
 - LibGuides
 - Collaborate
- Reference Services Committee
 - Reference hubs
 - Competencies
 - Training
 - Referrals
 - READ
 - DeskTracker
- Faculty liaison (working with teaching faculty, library committees)
- Joint projects (technology, collections, etc.)
- Operation of service activities (e.g. circulation, instruction, reference)
- Circulation

- Courtesy Cards
- Billing
- Oak Street
- Phone Center

Advancement

- Working with donors
- Unit promotion and marketing
<http://www.library.illinois.edu/committee/strategic/charge.html>
- Endowment funds
- Unit development (fund raising through the Library and/or through related departments)

Collections

Each unit head and designee should be familiar with the policies and procedures relating to the following or know where to go to find out this information, e.g., <
<http://www.library.uiuc.edu/administration/collections/policies/>>

Office of Collections:

Awareness of proper procedures for:

- o Receipt of gift materials
- o Disposal of materials that are part of the collection or that were received as gifts
- o Transporting of special collections
- o Withdrawal of materials from Library Collections
- o Binding and Preservation
- o Collection Development Committee

Acquisitions:

- Fund structure and fund reports
- Monitoring materials budgets
- Serials policies and cancellations

- Monograph ordering
- Outstanding orders and encumbrances
- Annual allocation process
- Approval plans

Cataloging

Digitization projects

Collection Maintenance

- CMS (formerly IPM)
- Reserves
- Transfers

Integrated Library Systems

- Voyager OPAC, Cataloging, AQC, Circ
- PRIMO
- SFX

Continuing Education and Mentoring (RPC head, LIS Head?)

The unit head is responsible for mentoring tenure-track faculty, and for identifying with each faculty member a balance of daily activities that provide reasonable opportunities for tenure-track faculty to accomplish their research and publication goals. Similarly, the unit head is responsible for identifying appropriate opportunities for Library staff to pursue ongoing development and advancement of their work-related skills.

- Peer review process
- RPC
- Scholar's Travel
- Research Board funding

Training and Community Building

The unit head is also responsible for fostering a positive work culture and ensuring that policies are applied consistently and fairly.

- Regular meetings and input from all staff
- Training and development of faculty and staff; including supervisory and management skills for unit head and others in unit
- Unit culture
 - culture of unit around parties, gift-giving, personal sharing
 - Cultural audit
- Socialization
 - Library-wide social events
- Recognitions
 - Library-wide awards program Awards Committee
 - Unit level recognition ideas
- Inclusive Illinois/Diversity Committee
- Supervisory Training Institute
 - DiSC-inventory of Work styles
 - Managing change
 - creative a positive work environment
 - giving feedback
 - managing conflict
 - Time management