Onboarding and training new electronic resources personnel in libraries: An overview of literature and resources

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Abstract:

Onboarding is the process in which new employees are introduced to an organization and its vision, mission, and values. Library literature reflects the importance of onboarding in welcoming new employees and positioning them for success in their roles, but many established onboarding programs and practices have been interrupted by the COVID-19 pandemic and shifts to online and remote work. This column provides an overview of library literature and resources for onboarding and supporting new employees in the area of electronic resources, with a focus on resources and processes that are available online.

Article:

Introduction

The COVID-19 pandemic has affected many aspects of library work, including the hiring and training of personnel. Due to the pandemic, some newly-hired personnel have started out working entirely or partially remotely in positions that—before the pandemic—would have been based in a physical library environment. Concurrently, due to the pandemic and its effects, some library personnel in existing positions have taken on new or adjusted duties because of shifts in task availability and institutional needs. This column seeks to provide resources for such personnel and their managers—particularly those in the field of electronic resources management—through examining the available literature regarding onboarding and supporting new personnel, and by highlighting online resources that can help those personnel in learning and doing their jobs. While the primary intended audience of this column is electronic resources personnel and associated work in academic libraries, some of the resources and literature discussed may also be applicable in other types of libraries and other fields within librarianship.

What is onboarding?

Onboarding is not a library-specific term or process, as it can be implemented in businesses and organizations across fields and disciplines. Fyock defined onboarding from a human resources perspective, as an organizational process in which new employees are introduced to the organization and its vision, mission, and values (Fyock, 2012). Onboarding experiences set the groundwork for employees to build successful connections and gain understanding of the organization, which can contribute to greater employee retention (Hall-Ellis, 2014; Winterman & Bucy, 2019). Onboarding can encompass general areas such as equipment, accounts, training, and networking, in addition to learning the specifics of one's job duties, and it is seen as separate from orientation and mentoring. Orientation generally provides a basic introduction and encompasses initial, transactional types of interactions, such as filling out benefits or HR paperwork. Mentoring activities may take different forms and could be included as part of onboarding, but—unlike onboarding—mentoring is not necessarily limited to introducing a new employee to the organization (Graybill et al., 2013). Onboarding can also be an opportunity for new employees to highlight and share their individual strengths in order to connect those strengths with the needs and opportunities in the organization (Keisling & Laning, 2016).

For the purposes of this column, onboarding is considered broadly, encompassing a range of tasks, practices, and information that contribute to new hires acclimating to their positions. While onboarding can be a formal, structured process, this column includes information about onboarding practices and possibilities that may exist outside of such formal structures and time limits that may be applied to official organizational onboarding processes. This column considers not only formal onboarding practices and resources, but informal practices that may help contribute to supporting new electronic resources personnel in learning their jobs. In the context of this column "onboarding" refers not only to the practices and resources provided by the organization, but also to the experiences and information needs a new hire may seek out as they are transitioning into their new position.

Onboarding in libraries

Many aspects of onboarding are general and can apply across industries and organizations, but the literature does reflect aspects of onboarding that are of particular relevance to academic libraries. Graybill et al. (2013) requested and reviewed onboarding documentation from a subset of Association of College and Research Libraries (ACRL) member institutions; this review of documentation identified areas that were unique to the onboarding processes of individual library institutions. These included "dealing with change, the scholarly communication process, understanding the team-based environment, the information literacy curriculum, diversity, different types of employees, ergonomics, conflict of interest policies, records retention policies, library publications, library awards, library fundraising, and faculty and governance information" (p. 210). Other highly institution-specific activities included socialization opportunities for meeting and developing connections with colleagues in the institution, as well as with external partners, if applicable (Graybill et al., 2013).

Keisling and Laning (2016) conducted interviews with newly-hired academic librarians, in order to more deeply understand the onboarding experiences of individuals. Their study responses indicated that the most useful aspects of their onboarding experiences were meetings with key personnel, including supervisors, administrators, and peers in other departments within the library. Interestingly, this differs from the findings of Graybill et al. (2013), whose survey focused on documentation and practices from the perspective of the institution—not individuals. The practices they identified as contributing to successful onboarding within academic libraries included discussion of policies, safety, and communication within the organization; mentoring and/or buddy relationship opportunities; socialization opportunities to connect new employees within the institution; implementation of onboarding program lengths that go beyond 30 days; use of checklists for personnel at all levels within the onboarding process; and the implementation of unique and institution-specific activities within the process. Given the findings discrepancies between the experiences of individual versus institution-based research, personnel who are involved in designing and leading onboarding experiences in academic libraries may want to consider potential measures of success from both the individual and institutional perspective

Online and remote onboarding

Graybill et al. (2013) asked how libraries might welcome and integrate new employees in order to help them acclimate and begin making contributions to the institution. This question becomes even more difficult to address in the time of COVID-19, when many new employees may be starting their work based fully or partially remotely in what might typically be an in-person position. In such situations, employees may not have the opportunity to meet with colleagues in person and to develop working relationships in ways that they—or the organization—may be used to. For many organizations, the pandemic created a need for online onboarding procedures designed specifically for remote employees; but not all online-based onboarding has been designed with remote workers in mind.

Library literature includes numerous examples of online-based practices and activities for onboarding. Baltimore County Public Library and Red Deer College Library have written about experiences in using online learning management systems (LMS) to deliver orientation, onboarding, training, and professional development content (Mantegna et al., 2010; Macnaughton & Medinsky, 2015). Wellemeyer and Williams (2019) also discussed the use of an LMS (Canvas) for onboarding activities, in the context of designing iterative, equitable, and reflective onboarding experiences in libraries; these activities and practices can be implemented in both in-person and online environments.

While some online-based onboarding practices and modules may be designed or easily adapted to support remote onboarding, supervisors and others who are delivering onboarding experiences should not assume that all online onboarding materials can automatically be used to successfully support remote onboarding.

Onboarding for electronic resources personnel

Most library literature related to onboarding is general in nature or is focused on onboarding within a certain type of library; literature specifically addressing onboarding needs of electronic resources personnel in libraries is extremely limited. Thornton (2021) examined onboarding for e-resources personnel with a focus on communication needs and strategies, especially in relation to understanding the Electronic Resources Life Cycle created by Oliver Pesch. Thornton offered an expanded version of Pesch's graphic, incorporating contextualization of stakeholders, roles, and the communication process associated with the electronic resources life cycle (Thornton, 2021).

Online resources to support new and developing electronic resources personnel

New employees within an organization may not be new to the field of librarianship. The resources provided here may be the most applicable to new and early career e-resources personnel, as experienced personnel may already have acquired knowledge and context related to field-based documentation in their areas of specialty. The following list provides an overview of selected organizations and resources that support the development and learning of electronic resources personnel in libraries. The list is not exhaustive, and experienced e-resources personnel will likely already have an awareness of some or all of these resources and organizations.

NASIG and the core competencies for electronic resources librarians

NASIG—formerly the North American Serials Interest Group, now known simply as NASIG—was established in 1985. The independent, membership-based group "promotes communication, information, and continuing education about serials, electronic resources, and the broader issues of scholarly communication" (NASIG, n.d). They offer an annual conference, regular webinars, a mentoring program to support students and new professionals, online guides, the Serials in Libraries Discussion Forum (SERIALST), and other resources, including the Core Competencies for Electronic Resources Librarians (CCERL). NASIG initially adopted the CCERL in 2013; since then, the document has seen minor updates in 2016, 2019, and 2021 (NASIG Core Competencies Task Force, 2021). The CCERL, which are freely available online, address seven primary areas: the electronic resources lifecycle, technology, research and assessment, successful communication, supervision and management, trends and professional development, and other personal qualities that can contribute to success in this work (NASIG Core Competencies Task Force, 2021). Further applications of the CCERL within the work of early-career, mid-career, and established electronic resources librarians are addressed by Dresselhaus et al. (2019).

Electronic resources and libraries

Electronic Resources and Libraries (ER&L) is an annual conference that "facilitates communication and collaboration for information professionals around issues related to managing electronic resources in the digital world" (ER&L, n.d). In addition to the conference, which welcomes new and experienced e-resources personnel and vendors, ER&L offers online workshops and supports an email list—Electronic Resources in Libraries—for discussing issues of relevance to e-resources personnel (ERIL-L, n.d).

Publications

The following journals and newsletters share content of potential interest to electronic resources personnel in libraries. Publications are listed in alphabetical order:

1. *Against the Grain* is a subscription-based publication, published by Against the Grain Media. ISSN: 1043-2094. https://www.charleston-hub.com/media/atg/
2. *Associates: The Electronic Library Support Staff Journal* is published online with no subscription required, made available by the University of California, Riverside. ISSN: 1077-6613. https://associates.ucr.edu/journal/
3. The *Journal of Electronic Resources Librarianship* is a subscription-based journal published by Taylor & Francis. ISSN: 1941-126X (print), 1941-1278 (online). https://www.tandfonline.com/toc/wacq20/current
4. *The Serials Librarian* is a subscription-based journal published by Taylor & Francis. ISSN: 0361-526X (print), 1541-1095 (online). https://www.tandfonline.com/toc/wser20/current
5. *Serials Review* is a subscription-based journal published by Taylor & Francis. ISSN: 0098-7913 (print), 1879-095X (online). https://www.tandfonline.com/toc/usrv20/current

Institution-based documentation

While information about broad and field-based guidelines and practices can be useful for learning about practices, challenges, and expectations within the field, each institution has its own unique set of collections, users, contexts, and stakeholders to consider. For this reason, access to documentation on local policies, procedures, and practices is especially critical for e-resources personnel.

Local documentation can be shared in many ways, including print and a variety of online formats. A previous column examined the use of online documentation portals in library technical services units and shared examples of such portals, which may be delivered in systems such as Confluence, LibGuides, Sharepoint, and other websites (Craft, 2019). Local documentation can also be made available through shared drives and other online systems that are not publicly accessible, as well as through shared print materials within the workplace, though the use of print documentation does not allow for the same ease of updating or wide access associated with online materials. In their survey of Association of College and Research Libraries (ACRL) member libraries, Graybill et al. (2013) learned that printed handbooks were more commonly implemented in new employee onboarding than online portals. This expectation and practice may have changed in recent years, especially in light of the COVID-19 pandemic, requirements for social distancing, and implementations of remote work for many employees.

Future directions

This column offered an overview of literature and available resources related to onboarding and training electronic resources personnel in libraries, but did not consult or survey such personnel to investigate current needs, challenges, and opportunities. Future research and scholarship in this area could include surveys of libraries or individuals regarding onboarding practices in

electronic resources and related areas, interviews with electronic resources personnel about their onboarding experiences, and case studies examining individual library onboarding practices and experiences, associated developments, and lessons learned—especially in relation to changes brought on by the COVID-19 pandemic. The following questions are suggested for future investigation:

1. What resources and practices have electronic resources personnel found useful in their onboarding experiences?
2. Are there specific needs of electronic resources personnel that are not being addressed in existing onboarding processes? If so, how might those needs be addressed?
3. How has the COVID-19 pandemic affected e-resources hiring and onboarding?
4. What resources could be created and shared to help support new e-resources personnel in their positions?

Conclusion

Personnel starting new jobs in library e-resources can always expect to encounter changes, challenges, and learning opportunities in their new and developing areas of work. This column offers a basic overview of relevant literature and resources to support personnel who are new to this work or who are entering new or different e-resources positions.

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