

Onboarding and Training a New Electronic Resources Librarian During the COVID-19 Pandemic: A Reflection

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Abstract:

Though many library practices and services were put on hold at the onset of the COVID-19 pandemic in 2020, hiring still took place in some academic libraries. This column details the process of remote onboarding in an academic library that was accustomed to in-person hiring and training, and it provides perspective from both the supervisor and the newly-hired electronic resources librarian in the UNC Greensboro University Libraries Technical Services Department. Authors seek to illustrate the process of developing a structured virtual onboarding program, as well as uncover the social challenges posed by physical distancing in a new working environment, and strive to answer the question, how does one become a part of a department when the department itself cannot meet in person?

Keywords: Academic libraries | electronic resources | libraries | onboarding | remote work | technical services

Article:

Introduction

As the COVID-19 pandemic began impacting communities in mid-March of 2020, many higher education institutions transitioned to remote work for employees and online learning for students, with many closing campuses for weeks or months. These changes caused significant impacts to academic library services and spaces, including search and hiring processes, with many libraries quickly transitioning to completely virtual processes. This column details a case study of an electronic resources librarian's onboarding and training process that was primarily conducted remotely during the pandemic. This academic library relied on in-person work as the pre-pandemic standard practice—and both the supervisor and e-resources librarian were new to remote hiring and onboarding processes—so they approached this as an opportunity to learn and

share experiences. While electronic resources work is often highly individualized, this column seeks to offer perspectives and lessons that can be applied broadly in electronic resources and technical services work. It discusses both the social and job-related challenges of remote onboarding and training.

For the purposes of this column, onboarding is defined as an intentional and structured process of bringing a new employee into the organization as a colleague and contributor to its mission and vision. A new employee needs to feel that they are working together with fellow employees and that they are being drawn into the culture of the library in ways that invite involvement and a sense of belonging. Training is a routine part of any onboarding experience, and in this context, it involves working with one or more colleagues to learn about the library management system, vendor and publisher platforms, and other tools and systems, including any options built in-house. Webinars and tutorials offered by vendors can also be helpful, and colleagues or the supervisor should be prepared to highlight those options to the librarian. In remote work situations there is even more of a need to establish a plan to ensure that the new librarian is not excluded from acquiring knowledge of various systems and tools. It is up to the supervisor to ensure that the onboarding process is effective and training is provided; the new librarian should not have to ask for information on their own.

Background

Numbers reported for the 2020 Association of College and Research Libraries (ACRL) Trends and Statistics Survey by The University of North Carolina at Greensboro (UNCG) University Libraries list 29 full-time equivalent (FTE) librarians, six FTE other professionals, and 56 FTE all other paid staff. Of those employees, the Technical Services Department is comprised of six tenured or tenure-track faculty librarians, 10 staff members and one temporary professional employee when fully staffed. The electronic resources librarian (ERL) faculty position was vacated in mid-February 2020. The following month, employees of the University Libraries began working totally remotely, due to the COVID-19 pandemic. The vacancy was challenging in that virtual environment as students, faculty, and staff required additional support in troubleshooting electronic resources issues, with physical resources inaccessible and only online collections content available. To manage these requests for assistance, the Libraries' Electronic Resources Help (ERHelp) team, numbering four staff positions, worked closely with the Head of Technical Services, the Online Learning Librarian, and personnel in the Electronic Resources and Information Technology Department. The lack of an ERL was a substantial loss, and the Libraries endeavored to quickly begin the process to hire a qualified individual into the position. Even as pandemic restrictions eased enough for the University Libraries to reopen with reduced hours, there were limitations on in-person spaces and resources that highlighted the need for an ERL to be available as a support to virtual learning and research.

The ERL position, as with other librarians at UNCG, is on the tenure track and holds faculty status and rank. Responsibilities include troubleshooting electronic resource issues encountered by members of the UNCG community; negotiating licenses for serials, databases, and streaming media; receiving invoices and entering them into the workflow for receiving and invoicing; developing strong working relationships with vendors and publishers; serving on the Collection Management Team; and serving as a negotiator for the Carolina Consortium, which negotiates

license terms for big deals, databases, and other electronic resource subscriptions and one-time purchases as well as services on behalf of member libraries (Carolina Consortium, 2020). When the ERL position was vacated, those activities were temporarily absorbed by other library faculty members, but that was not a long term solution.

Prior to the pandemic, the University Libraries typically conducted first-round interviews via telephone, followed by finalist interviews on campus. Those interviews typically started with a late afternoon tour of campus and a meal with members of the search committee the evening before the all-day interview. The following day, sessions could include a presentation to all Libraries employees, lunch with a small group of library personnel, and meetings with stakeholder groups such as the search committee, members of the hiring department, the supervisor, the dean, the chair of the Promotion and Tenure Committee, and an administrative staff member who discusses benefits information and handles travel reimbursement. Depending on the position, other meetings could be included. For candidates unfamiliar with Greensboro, a tour of parts of the city might be offered. That demanding on campus interview could be grueling for a candidate, but one clear advantage was allowing the finalist candidates a chance to get a sense of the community and the Libraries as a place. Established processes for finalist interviews were entirely in-person-based; experiences during the move to virtual hiring offered some new possibilities.

The University Libraries transitioned to virtual searches starting in the spring of 2020, just as the pandemic and accompanying social distancing mandates began affecting educational institutions. The ERL search began in April 2020 with the position description distributed via email lists and hiring platforms. In May, what would have been phone interviews with the first round of candidates had to be moved to Zoom calls (with cameras off), since employees were working from home. Finalists were invited to full-day interviews via Zoom in mid-June. Just at the point of an offer being presented, an institutional hiring pause temporarily halted the search. The process restarted in December with a follow up interview, the candidate's acceptance, and a start date of February 8, 2021.

Onboarding the new Electronic Resources Librarian (ERL)

The newly hired ERL went through the onboarding process almost entirely remotely. While some employees were working in the department's physical space at that time, most members of Technical Services were working exclusively remotely, or were limiting time in the building to a day or two each week to allow for distance between colleagues in the open office.

The Head of Technical Services, the new librarian's supervisor, considered how to begin the onboarding process. Since the ERL would not have an institutional email address until her start date, some communication would have to be handled prior to that date—enough to share or gather information, but not so much that the new librarian would feel that work was expected without compensation. The supervisor and the ERL agreed on using the new librarian's personal email and both faculty members' personal phone numbers for infrequent but essential messages. The interim Dean of the Libraries, who was also involved in the hiring and onboarding process, communicated directly with the ERL for human resources-related questions and forms that needed to be completed prior to the official start date.

On the ERL's start date, she had the opportunity to meet with the supervisor in-person, coming to the library to see her office and have a very brief library tour for her first visit to the building. The ERL and supervisor walked to the campus Human Resources building to complete some documentation, visited the office that provides university identification cards, and toured some of the campus. The ERL came to campus another day to meet with library information technology staff in order to configure her laptop, which required an initial on-campus connection to complete the setup process. Other than these initial visits to campus, the new librarian's first several months were spent working remotely.

Social aspects

The supervisor wanted the ERL to have a comfortable onboarding experience with a chance to meet colleagues and become familiar with the library culture and work environment. This was the biggest challenge, as many of the pre-pandemic approaches in this regard disappeared. The traditional onboarding process is executed by a series of in-person introductions, tours, human resources seminars, and departmental meet and greets. Within any given day, the new librarian would be afforded the opportunity to seamlessly blend the job-related training (hard skills) with the socialization piece (soft skills). However, replicating this process in a remote environment is unrealistic. One can initiate an online chat session or impromptu Zoom call, but it is not the same as simply walking over to a colleague's desk to ask questions or finding oneself in a serendipitous learning opportunity. This is a true gap in the virtual onboarding process.

Therefore, remote onboarding requires a great deal of structure and intentional planning. Coming to a place of acceptance about these extra necessities was the first step. Collegiality would not develop in the early days of onboarding if the ERL was simply alone with her screen completing a checklist of access requests and library familiarization activities, so the supervisor put together a series of meetings with key library personnel who were able to share their varied roles and insights about the library culture and university structure. These meetings were established over the first few weeks in an effort to scaffold the information and responsibilities. Additionally, many library personnel vocalized their intention both to provide support and also to avoid bombarding the new librarian with too many Zoom sessions. She needed adequate time to reflect on the content of the meetings and stave off information overload. Of course, the ERL experienced learning gaps, but that is to be expected. Over time she developed the necessary knowledge and skills to perform her job duties, but she notes, "onboarding remotely was at times awkward and rife with unknowns, but so often these feelings were abated by the outward gestures of kindness and grace from fellow colleagues."

There is clear evidence that many library job functions can be effectively performed remotely, and this was certainly the case with UNCG's new ERL. However, because the librarian was new to the university and academia in general, it was important to the supervisor that there was an extra piece to the onboarding process to help with socialization. The ERL was paired up with another library faculty member who served as an "onboarding buddy." The goal was to provide her with an informal, confidential, no-stakes opportunity to ask questions about the work environment and the culture of the library, or anything on her mind. At first, the pair met up

weekly, with meetings becoming less frequent as the new librarian acclimated to the job and became acquainted with more people.

Optional weekly departmental Zoom meetings provided a particularly welcoming environment for the ERL to become familiar with Technical Services colleagues. When the department transitioned to remote work in March of 2020, a Technical Services faculty member set up a short daily Zoom meeting for the department to talk about concerns, how colleagues were managing during the early days of the pandemic, what was happening at home with family or pets, and to provide a place to talk casually about any topic of interest. By the new librarian's start date in February 2021, those sessions were scheduled on a weekly basis. As they were optional, the meetings were attended by a core group, with some colleagues joining in on an occasional basis and others choosing not to attend. The ERL became a regular attendee, so that was another low stakes opportunity to become familiar with office mates while working remotely.

One enjoyable opportunity for the ERL to meet colleagues involved a trip to the library in early July 2021 to participate in a Libraries-wide ice cream social event on the front lawn. The new librarian was able to meet colleagues from Jackson Library (including her search committee chair) and the Harold Schiffman Music Library. The day was beautiful, so meeting outside, wearing masks, and social distancing helped people feel comfortable as they gathered for casual conversation and introductions.

Learning the role

The supervisor provided the ERL with an onboarding document that was developed from the Onboarding New Academic Librarians Template that was created by Lisbon and Welsh of the University of Colorado Boulder (2020). Numerous supervisors at UNC Greensboro have customized this template to provide a thorough overview of information valuable to newly hired library faculty members. Through a series of weekly meetings between the supervisor and the new librarian, the two went through the document, talked about the content, and asked and answered questions. The document remains available for reference at any time by the ERL.

The ERL position requires intricate knowledge of the full electronic resources lifecycle, and one important aspect of this is cultivating a partnership with the vendors. From basic access issue resolution to large-scale knowledgebase clean up projects, a solid, communicative relationship with content providers is key to smooth electronic resources operations. Therefore, the supervisor began connecting the ERL with key vendors as early as her second week on the job. Several vendors provided customized Zoom sessions to familiarize the new librarian with the platforms and products.

Another role the ERL immediately assumed was working as a negotiator for the Carolina Consortium (CC), which works to enable libraries in North and South Carolina to use their bulk purchasing power to obtain favorable pricing on a variety of electronic resources and services. The supervisor, also serving in this role, invited the ERL to shadow in a Zoom meeting with a prospective publisher. After shadowing that meeting, the ERL was able to independently represent the CC with the deals that she was going to oversee. The new librarian notes, "though I

came to this position with eight years of experience negotiating contracts and deals with library vendors, I was hesitant to jump in and represent the Carolina Consortium being so new to it. But, after shadowing, I realized that I was ready and felt much more confident.”

The ERL had transitioned to academia from a federal government library where engagement with the larger library community was limited. Scholarship activities, a requirement for tenure, became a new focus on her professional growth. In the spirit of collegiality, several faculty members reached out to the ERL to collaborate on conference opportunities. She co-presented a session at a UNCG-based conference in the spring of 2021 with the Online Learning Librarian, where they presented to the UNCG community on how best to engage with the library’s electronic resources collection, and how to get the most out of a relationship with liaison librarians. She also teamed up with UNCG Libraries faculty colleagues to present a poster at the North Carolina Library Association (NCLA) Biennial Conference; this session focused on the remote onboarding process. At the same conference, the ERL also participated in a panel discussion with her supervisor and librarians from other local universities and colleges, focusing on the virtual academic interview process and what it means for hiring going forward post-pandemic.

Committee service is also an expectation for faculty in the University Libraries. By virtue of her work role, the ERL was automatically made a member of the University Libraries’ Collection Management Team. As one of ten members from across the Libraries, the new librarian met colleagues involved with managing and making decisions on resources during a delicate time for budgets and the potential for a large deselection project. The ERL later joined a library-based search committee after volunteering for that opportunity to pursue an interest in hiring procedures.

Tools and resources

It was imperative that the ERL’s training focus immediately on getting up to speed with the Libraries’ cloud-based library management platform, WorldShare Management Services (WMS). She actively sought out various WMS webinars, and joined relevant discussion groups regarding e-resources management hosted by OCLC (formerly the Online Computer Library Center, now just known as OCLC). She also met regularly with colleagues for one-on-one tutorials of the WMS system.

As previously noted, the new librarian’s prior job offered limited contact with the larger library community, which limited opportunities to participate in professional organizations and scholarly communication. In her new position, the ERL started following various e-resources-focused email lists and subscribed to communications from relevant content providers. She particularly benefited from the regular webinars from the Association of Southeastern Research Libraries (ASERL), which provides a wide variety of topics related to academic librarianship and equity, diversity, and inclusion work. She also participated in virtual events hosted by the North Carolina Serials Conference, the American Library Association, NC LIVE (North Carolina’s statewide library cooperative), and the North Carolina Library Association.

Challenges and lessons learned

The move to a virtual hiring process in this situation was not an option or an experiment, rather it was demanded by the circumstances of the pandemic and a need for safety in meeting with people in the process, travel restrictions, and campus and state mandates and guidelines. The ERL search committee and the dean were the first to consider possibilities and workarounds, initiating the hiring workflow changes that led to the exclusively remote experience. The supervisor, while not part of the search committee, was privy to the planning and was able to make suggestions. The overall goal was to offer a safe hiring experience while also being equitable to all applicants.

Upon reflection, the main lesson learned was the value of intention and planning. The supervisor made very strategic plans to guide the new librarian through the onboarding process with the intention to foster collegiality as best as possible in a remote environment. The ERL went through the onboarding process with the daily intention to demonstrate accountability to colleagues and build relationships. It remains unclear if remote onboarding will be required in the future at the UNCG Libraries, as the university continues to move toward more in-person, office-based work. However, both the supervisor and ERL recommend a particular focus on the social networking aspect of onboarding, as that was their biggest challenge.

Final thoughts

The process of onboarding and training the new librarian was successful because the steps taken were handled effectively overall, and library colleagues reached out to welcome their new colleague. The ERL actively asked questions, and coworkers responded with grace and in the spirit of inclusion. Cultivating trust between the new employee and their supervisor and colleagues is even more critical in a virtual environment. Getting to know one another is not as easy virtually with body language and social cues limited in Zoom meetings and phone calls. Both the new librarian and the supervisor put effort into using opportunities, limited though they were, in order to begin to develop a comfortable working relationship. The lessons learned in this experience will help guide the involved parties and the department in future hiring processes, whether remote, in-person, or a blend of both.

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