

Time Keeps Ticking Away

Time Keeps Ticking Away

Quick Synopsis

The client has a training document that needs to be revised. Although he believes that the training outcomes are effective, he thinks that the time it takes to accomplish the training is inefficient and in addition, does not match the workflow that staff are using to implement the training. He wants to reorganize the training document so that content is grouped by location as well as review the types of questions that are asked on the document. He does not want to sacrifice any training outcomes with the revision.

Learning Theory

The guiding learning theory for this training is constructivism. The Library Manager is a firm believer in learning by doing. In his words, the student assistant manual provides exposure to the training process but the real learning happens when the student assistants are actually performing the on-the-job actions. The training is designed so that student assistants can understand the available resources they have to help them perform their jobs. The Library Manager wants to ensure that student assistants know where to look and how to find out information but not that they “need to know everything.” He also believes that effective training occurs when the student assistants explore the answers for themselves. He prefers library staff to assist as guides instead of dictating the answers. He believes that training should be an ongoing process and should not ever stop. “People aren’t trained. They are equipped.” The training that they undergo at the beginning of the job grows and expands as they progress in their knowledge of the job.

TAP

“Time Keeps Ticking Away” is the title of this instructional design (ID) as the main reason for this ID is to revise, redesign, and reorganize a training document created by the Library Manager of the Business Library at the Cox School of Business at Southern Methodist University. The Library Manager (LM) created a Buddy-Up Checklist, the training document, to serve as reinforcement for initial training with Business Library Student Assistants. See Appendix A to view the current Buddy-Up Checklist.

The problem stated by the LM with the current document is two-fold:

1. Inefficient use of library staff and student assistant staff time to work through the document
2. Unnecessary or missing pieces of content on the Buddy-Up Checklist

The methods used to gather information for this analysis were the following:

- Direct observation of all of the personnel
- An interview with the client that was recorded in both audio form via a smartphone app and hand-written notes
- Document review of past Buddy-Up checklists

Time Keeps Ticking Away

The Business Library is a small, specialized library that is located in the Cox School of Business on the first floor. As it is not a stand-alone building, it is embedded in the lives of business students, faculty, and staff as well as the larger SMU community. Within the Business Library, there are two main points of service, the front desk, which is the first and last point of contact for visitors entering and leaving the library, and the service desk, which is located in the back of the library. A student assistant staffs each desk. It is at these desks that visitors of the Business Library ask for services and assistance in person or via phone. In addition, inside of the Business Library exists the Kitt Investing and Trading Center (KITC). In this room, finance classes as well as library workshops take place during the week.

The personnel of the Business Library consist of the library director, the library manager, two full-time librarians who work during the day and two part-time librarians who mainly work in the evenings. With the exception of the library director and the library manager, the librarians rotate working on weekends. The age of the personnel range from late 30's to mid-50's and all have advanced degrees. As it is a small staff, all of the personnel of the Business Library come into daily contact with the student assistants.

Currently, the Business Library has thirteen student assistants. While all of the student assistants range in age from 18-24, some of them are working on their first undergraduate degrees while others are working on advanced degrees. For the majority, English is their second language and they traveled from a foreign country to study at SMU. Their areas of study vary across campus from telecommunications, engineering, business, law, pre-med to undecided. On a regular basis, off-duty student assistants study and hang out in the Business Library. At the beginning of the hiring process by the LM, the student assistants all undergo immersive training with the LM before they interact with visitors to the Business Library.

At the beginning of each semester, usually within the third week, the LM assigns around two to three student assistants to all library staff, including himself. Each staff member has about two weeks to go through the Buddy-Up checklist with his or her assigned students.

The LM created this document to accomplish the following:

- Student Assistants
 - To reinforce the training received at the beginning of their employment
 - To provide opportunities for student assistants to share input on what content should be on the training document
- Library staff
 - To increase networking with the student assistants by established meaningful mentor relationships
 - To provide opportunities for staff to learn from students by observing how student assistants approach their daily duties

Time Keeps Ticking Away

Problem

The current layout of the Buddy-Up checklist is a one-page document that is meant to reflect the types of questions and issues that a student assistant would need to deal with on a daily basis. Since the types of questions a student assistant would receive are haphazard, the layout of the questions on the Buddy-Up checklist are randomized; however, the LM, and the instructional designer, in observing how library staff, including the LM, have managed the training over the last two years realize that staff have superimposed an order to the random questions. Library staff consistently group the questions into a location-based system. As an example, questions that deal with front desk duties are all covered at the same time even though on the sheet they are scattered. To maximize both staff and student assistant time, the LM wants to redesign the document so that the questions are reorganized by location.

In addition, the LM has noticed that some of the questions that are asked on the Buddy-Up checklist are no longer relevant and do not serve a legitimate training purpose. One example of such question is “Greeting patrons and maintaining a professional appearance at the desk is #1 priority of [student assistant’s]. How comfortable are you doing this? According to the LM, this question came directly from the student assistant manual and is one example of an item that can be observed during regular work hours and does not need to be addressed specifically on the Buddy-Up checklist.

A missing example noticed by the instructional designer and discussed with the LM is the need to address the proper procedures for the student assistant at the front desk when a class occurs inside of the KITC. During observation, the instructional designer noticed that a class was scheduled to start at 11am. At 10:45am, the student assistant at the front desk had not automatically started the process to close down the KITC and notify students using it about the upcoming class. Upon questioning the student assistant, the student assistant stated he was unaware of the proper procedures. While somewhat skeptical about the validity of this statement as previous classes had occurred prior to this while the student assistant was on duty, the instructional designer believes that adding this procedure to the Buddy-Up checklist can help mitigate future situations like this. In addition, during this semester’s buddy-up, many student assistants provided feedback about items they think should be on the document but are not, such as what to do when class evaluations and test packets are turned into the library, proper procedures for checking out books (as this is a new process in the Business Library)

The LM would like to take suggestions such as these into account during the update without sacrificing any training outcomes. During the interview, the LM made it clear that he feels that the current Buddy-Up training document results in effectively trained student assistants. He simply wants to improve the manner and method of training to make the most efficient use of staff time involved in the training.

Needs

Learner (student assistant) needs

- Understand the daily duties of a Business Library student assistant

Time Keeps Ticking Away

- Realize and make use of the resources that are available to student assistants while on the job
- Feel comfortable approaching any library staff member to ask questions
- Ability to efficiently and accurately perform student assistant library duties
- Know where to look for answers to questions and who to ask
- Build on-the-job skills that will assist them in future internships and careers

Learner (staff needs)

- Appreciate what student assistants do on a regular basis
- Feel comfortable approaching any student assistant with requests
- Learn from and actively see how student assistants perform their jobs
- Effectively use staff time during training times

Instructor (LM) needs

- Foster networking opportunities between student assistants and library staff
- Create mentoring relationships between library staff and student assistants
- Maintain an effectively and efficiently trained student assistant staff
- Maximize training outcomes with effective use of staff time
- Assess training content for superfluous or missing content
- Wants student assistants to feel comfortable approaching any library staff member and vice versa
- Reorganize the Buddy-Up checklist to match the approach taken by library staff
- Wants staff to view the student assistants as people and not things to manage
 - If the student assistants cannot perform the foundational duties of the library, then staff will have to do it
- Wants full staff buy-in of the Buddy-Up, including the time it takes to accomplish the training
 - Fully and effectively trained student assistants allow staff members to focus on staff duties, such as research and reference requests instead of the day-to-day duties that student assistants can take over, such as straightening up the library
- Wants student assistant buy-in of the Buddy-Up as the most effective method for training
 - Understand that on-the-job training in an authentic context results in realistic training

Wish list for LM (may not be feasible to implement)

- Allot a percentage of the Business Library budget to training
- Simulate training environment in a staff member's office and still have both desks staffed
 - Current environment requires staff and student assistant to be away from their offices/desks during training
- Additional staff to assist during training times and to decrease the student assistant staff ratio from 3:1 to 2:1

Time Keeps Ticking Away

Environmental Resources

- Buddy-Up paper checklist
- LM's knowledge and past experience as a manager of full-time staff in a bookstore
- LM's personality
 - Extremely approachable and open-minded
- LM's method of management
 - Management by walking around
 - Active training exercises
- Library staff's knowledge of daily working environment of the library and types of questions received
- Authentic training environment of the Business Library
 - Front Desk
 - Service Desk
 - Kitt Investing and Trading Center
 - Actual classes and workshops taking place
 - Equipment used by student assistants and visitors of the library
 - Headphones and dry-erase markers
 - Computers
 - Printing
 - Books, newspapers, reserves
 - Study rooms

Since the Buddy-Up training takes place in the library during normal work hours, student assistants have the benefit of receiving real-time authentic training and staff have the benefit of providing real-time authentic training examples. Student assistants are able to interact with visitors to the Business Library who have real needs and questions, e.g., KITC class procedures, need for markers, help printing, or reserving study rooms, as opposed to ones made up by staff. Another benefit of the environment are the people involved in the training, the LM, who is always providing constructive feedback to student assistants as well as praising them for jobs well done, and library staff who through their daily duties understand how the library should function and the types of questions visitors will ask.

A limitation of the environment is that staff cannot correct error in-depth in real-time as the visitor is standing there waiting for the service. In those cases, staff must either let the error stand, if it is not detrimental to the service, or provide a limited correction and then, allow the transaction to proceed. After the visitor has left, staff must then retrospectively help the student to analyze what went wrong and what should have happened but the benefits of real-time analysis has been lost.

Learning Expectations

The LM is a firm believer in learning by doing. In his words, the student assistant manual provides exposure to the training process but the real learning happens when the student assistants are actually performing the on-the-job actions. The training is designed so that student

Time Keeps Ticking Away

assistants can understand the available resources they have to help them perform their jobs. The LM wants to ensure that student assistants know where to look and how to find out information but not that they “need to know everything.” He believes that training should be an ongoing process and should not ever stop. “People aren’t trained. They are equipped.” The training that they undergo at the beginning of the job grows and expands as they progress in their knowledge of the job.

Course/Lesson Goals and Objectives

1. The instructional designer and client will generate a new Buddy-Up checklist that:
 - 1.1. Will present the information in a logical and time-efficient manner
 - 1.2. Will categorize the content by spatial location
 - 1.3. Will differentiate between content that is necessary and content that is outdated
 - 1.4. Will accurately assess the knowledge, skills, and abilities of the student assistants
 - 1.5. Will construct opportunities for library staff and student assistants to intermingle and bond

2. The student assistant will acquire working knowledge of the Business Library by participating in the Buddy-Up training.
 - 2.1. Student assistant will demonstrate on-the-job training skills
 - 2.2. Student assistant will detect issues out of the ordinary and report them to library staff
 - 2.3. Student assistant will identify and recommend issues that should be addressed during training and are not
 - 2.4. Student assistant will develop a relationship with library staff during training
 - 2.5. Student assistant will explain their duties to library staff as they perform them

3. The library staff member will implement the student assistant training.
 - 3.1. The library staff member will identify daily tasks that student assistants perform that allow staff to devote more time to their duties
 - 3.2. The library staff member will demonstrate effective library procedures when training student assistants
 - 3.3. The library staff member will develop mentoring relationships with the student assistants they train
 - 3.4. The library staff member will conduct in-depth training with student assistants that
 - 3.4.1. Will identify areas that the student assistant needs addressed
 - 3.4.2. Will illustrate the strengths of the student assistant

Course/Lesson Components

Learners

- Buddy-Up paper checklist
- Student assistant manual and wiki
- Business Library environment
 - Kitt Investing and Trading Center
 - Actual classes and workshops taking place

Time Keeps Ticking Away

- Equipment used during the Buddy-Up training
 - Headphones and dry-erase markers
 - Computers
 - Printing equipment and supplies
 - Books, newspapers, and course reserves
 - Study rooms

Instructors

- Buddy-Up paper checklist
- Student assistant manual and wiki
- Library Manager and library staff's knowledge of the
 - Daily working environment of the Business Library
 - The types of questions received
- Library Manager's method of management
 - Management by walking around
 - Incorporates active training exercises

Learning Activities

Library staff and student assistants will be provided a copy of the revised Buddy-Up document. (1.1 – 1.5)

Library staff will review the document and complete the training. (3.1 – 3.4)

Student assistants will actively demonstrate the training under the guidance of a library staff member. (2.1 – 2.5)

Feedback will be gathered from all participants by the instructional designer and shared with the library manager to assess the effectiveness of the document. (1.1 – 1.5)

Assessment

A trial buddy-up session with library staff members and student assistants will take place over the period of a week. The library staff and student assistants will consist of a mixture of day and evening staff to account for a normal week in the library. The student assistants and library staff will be provided a copy of the revised Buddy-Up checklist to review and implement. Data will be gathered from direct observation, written feedback from the Buddy-Up checklists, and interviews with the library manager, library staff, and students.

Evaluation

1. *How will you tell if the instructional design was successful? Who will determine this? Will there be an outside, unbiased observer? A satisfaction survey?*

Written and spoken feedback as well as direct observation of the library manager, library staff, and student assistants will determine a successful revision if:

- The Buddy-Up checklist is both easier to follow and takes less time to complete by library staff

Time Keeps Ticking Away

- Previous gaps in training are addressed without sacrificing overall training standards
- Student assistants produce effective on-the-job training knowledge

2. *Does your assessment relate to your evaluation? How?*

The assessment relates directly to the evaluation as it uses the actual training document. If library staff and students are able to effectively address all the training areas, which will include new ones, in lesser time from previous trainings, the revised document is a success. If the training takes longer or is more complicated, the revised document is a failure and will need to be reviewed and reworked.

3. *How will you determine whether your outcomes relate back to your original needs analysis and goals/objectives to determine the effectiveness of your intervention/implementation?*

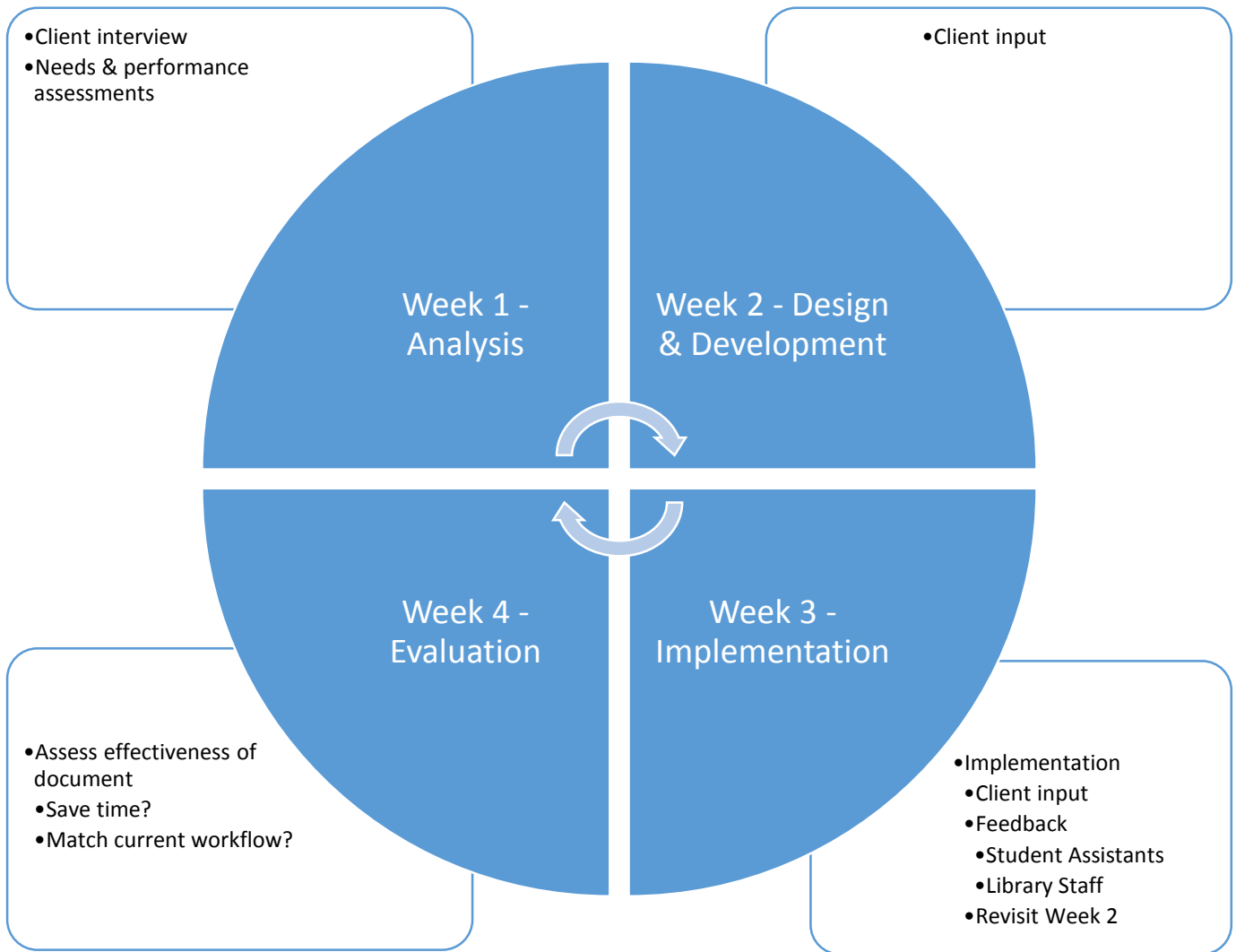
As the issue with the current training relates to inefficient uses of library staff time and outdated questions from a student assistant perspective, updating the Buddy-Up document to follow a logical, spatial order with relevant questions will meet the learning goals and objectives. If the Buddy-Up requires less time to complete and addresses the current training needs of student assistants, the revision is a success.

Timeline

The expected timeline for this project is four weeks and will follow the traditional ADDIE framework. In Week 1, the instructional designer interviewed the client in order to create the needs analysis and assess what the core problem is. In Week 2, the instructional designer will begin the design and development phases of the project and confer with the client about the overall look and feel to the paper document. The instructional designer will mock up a template of the new paper Buddy-Up document and present it to the client for approval and/or changes. In Week 3, the implementation phase will begin. The instructional designer with the client will test out the new Buddy-Up with both student assistants and library staff. Feedback from all will be considered and if needed, the instructional designer will revisit the design and development phases. In Week 4, the evaluation phase will commence. The instructional designer along with the client will determine the effectiveness of the new document to discover if staff time has been saved and the document mimics the current workflow.

The entire Buddy-Up training process should require a week to complete. The time it will take to complete each of the sections of the Buddy-Up training will depend upon the student assistant. This training process models a guided discovery approach as the content is the same for all student assistants and library staff but how and when the students, with the help of library staff, arrive at the answers will vary.

Time Keeps Ticking Away





Job Aid

for the

BUSINESS LIBRARY “Buddy-Up” CHECKLIST

A Library Staff Member’s Guide to Successful Training

SM

Table of Contents

Introduction	3
• <i>What this job aid is not</i>	3
• <i>What this job aid is</i>	3
Before the Buddy-Up training process begins	4
• <i>Examples of notifications</i>	4
• <i>Talk with your assigned student assistants</i>	6
• <i>What's the point? AKA the learning goals and objectives</i>	6
During the Buddy-Up training process	8
• <i>Equipment needed</i>	8
• <i>Time to train</i>	8
After the Buddy-Up training process	11
Congratulations!	11

Introduction

Where is the scanner? How do I make copies? How do I get to the Business Library? Where is 175 Crow? Can I just talk to my friend in the Trading Center? How late does the library stay open? How do I reserve a study room? Do you [the Business Library] have markers that I can borrow?

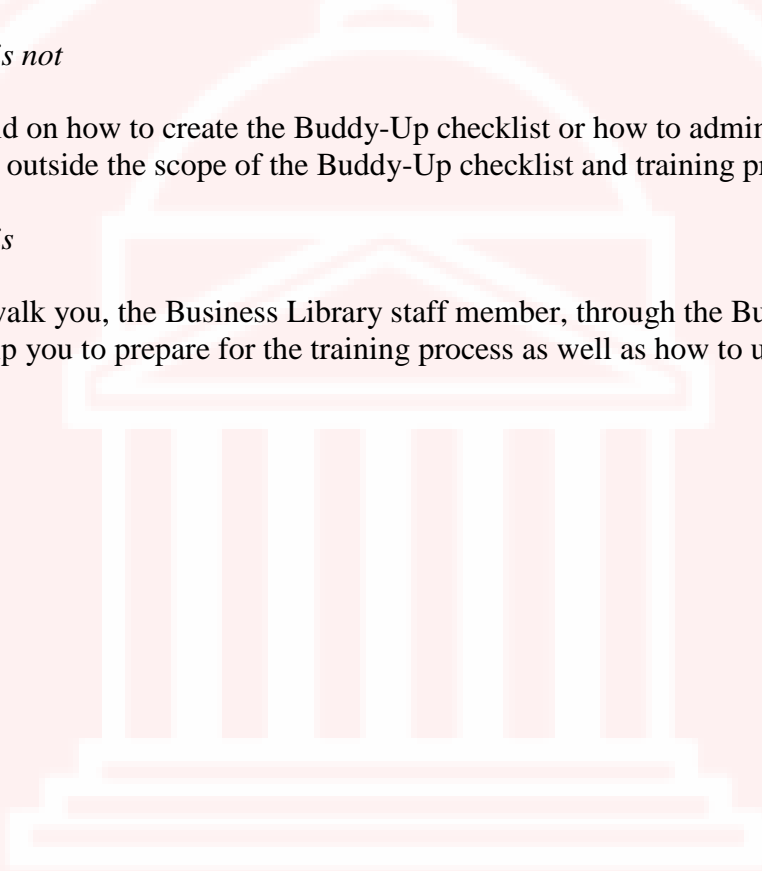
Perhaps these questions, and ones similar to them, sound familiar to you. Questions like these signify that it is the start of a new semester, which means that it is also time for new and returning student assistants to complete the Buddy-Up training.

What this job aid is not

This is not a job aid on how to create the Buddy-Up checklist or how to administer it. Those responsibilities lie outside the scope of the Buddy-Up checklist and training process.

What this job aid is

This job aid will walk you, the Business Library staff member, through the Buddy-Up training process. It will help you to prepare for the training process as well as how to use the Buddy-Up checklist.



Before the Buddy-Up Training Begins

Examples of notifications

At the beginning of the Fall and Spring semesters, around the second week of classes, the Library Manager will send out an email to all Business Library staff about the Buddy-Up sessions. The email will provide the following information:

- The dates in which library staff can conduct the Buddy-Up trainings, usually over a 2-week period.
 - This is to allow library staff and student assistants enough opportunities to work together and to cover the Buddy-Up checklist.
- The assigned library staff and student assistant groupings, usually 2 to 3 student assistants per each staff member.
 - The Library Manager makes the assignments but is amenable to changes or suggestions as long as he is notified via email or in person.
- Examples of typical questions and some rational explanations.
 - These can take the form of new questions that are on the Buddy-Up and the acceptable answers to the questions or they can be explanations of why specific questions are no longer on the document as well as why new ones now appear.

Below is an example of a recent Buddy-Up notification email sent to Business Library staff. Names have been removed to protect the innocent (or the guilty):

Attached (pp. 12 & 13 of this document) is this semester's version of the Buddy-Up checklist. As with each semester, there may be slight changes so please use this attached list as it is most current. These sessions can begin as soon as you are ready, and should conclude by 10:30am on Monday 2/02 (before our monthly all staff meeting – so we can talk about the sessions during the meeting).

As with past semesters, please check for student assistant understanding regarding the points on the list, reinforce their knowledge through short discussion and use this time to develop relationships. If you find that there is need for formal training in a key area, utilize the list to let me know and I will set up a session with the student assistant to address the concern.

Below are the student assistant assignments for each librarian and me. I tried to make sure there were multiple opportunities for you to interact with them so there would not be the burden of trying to complete the list in one shift, if you did not want to. That said, though there was method to my assignments, I'm not emotionally tied to this list, so if you want to switch with each other, no worries. Just let me know so I can maintain an updated chart.

p.s. Remember, there is one question on the list that can be a stumper. It is 'Where is 150 Crow?' The answer is the new residence hall area as that classroom is in the newly built Cathy Crow Commons. However, in the scheduling system, the designation is simply 150 Crow and a student was frantically pacing up and down the hall in front of our hallway study rooms trying to find their classroom on Wednesday (9/3). This should open the discussion about how SMU is fond of giving similar names to different buildings (Perkins School of Theology & Perkins Admin Building; Dedman College, Dedman Life Center & Dedman School of Law) and if the answer to the patron's dilemma is not apparent, find out more (a patron comes in to ask where Meadows is... are they wanting to look at Spanish masterpieces <they probably want to go to Meadows Museum> or visit with music faculty <direct them to Meadows School of Art>).

The deadline to turn the checklist in to the Library Director is by 10:30a on Monday, 2/02/15.

Assignments:

Library Director = Student Assistant 1, Student Assistant 2

Library Manager = Student Assistant 3, Student Assistant 4, Student Assistant 5

Librarian 1 = Student Assistant 6, Student Assistant 7, Student Assistant 8

Librarian 2 = Student Assistant 9, Student Assistant 10

Librarian 3 = Student Assistant 11, Student Assistant 12

Librarian 4 = Student Assistant 13, Student Assistant 14

Corresponding to the staff email, the Library Manager also sends out an announcement to all of the student assistants using the student wiki (<http://bicstu.pbworks.com>). Below shows an example of a recent student notification:

Tuesday, January 20th - from Library Manager

Tomorrow begins this semester's round of Buddy-Up sessions. This is the period when a librarian (or me) will get with you and ask all sorts of questions about your job as a student assistant. These are real scenarios of things that have (and will) come up during student assistant shifts. The Buddy-Up sessions determine your ability to answer these things effectively.

Everything has been addressed, either in your initial training, or your first two weeks on the job, so you should not feel worried about being able to answer these things. If you want, I will even give you the Buddy-Up sheet from which the librarians (and me) will be asking the questions. Just come by my office and I will print a copy for you to have.

We do not conduct these sessions just to try and catch you on something. We do these because we want you to be prepared for whatever may come up during the course of your shifts and identify if more training is necessary for you to be successful as a student assistant. So, if you have any questions, please ask. I will be happy to answer whatever is on your mind. May you all have very successful Buddy-Up sessions! I am confident you will.

As long as you have set up your staff wiki account (<http://bicstu.pbworks.com/>) to receive email notifications, you will receive an email with the announcement text when the Library Manager posts it online. If you need help setting this up, please talk with the Library Manager or the Reference & Digital Services Librarian about how to do this.

In addition, during the weekly staff meeting that precedes the beginning of the Buddy-Up training period, the Library Manager will discuss any additions, deletions, and “trick” questions that appear on the current Buddy-Up checklist. This is also your time to ask questions about questions and/or answers you are unsure of or need more information on before the training with your assigned student assistants begins. This pre-Buddy-Up staff meeting is held to ensure that training is consistent across student assistants and that library staff are all on the same page with the Buddy-Up checklist; particularly, the why questions and the answers you should elicit from your assigned student assistants.

Talk with your assigned student assistants

After receiving the email notification from the Library Manager and after the announcement has been posted to the student assistants, it is important to make sure that you touch base, or talk, with your assigned student assistants before the Buddy-Up training sessions start.

1. Most importantly, this lets the student assistants know who will be conducting the training with them.
2. It allows you and the student assistant to discuss the best times to conduct the Buddy-Up training during the 2-week period.
3. It provides an opportunity for the student assistants to ask for a copy of the Buddy-Up checklist before the training sessions begin, which allows the student assistants the chance to prepare ahead of time.
 - a. Some library staff automatically provide a copy of the Buddy-Up checklist to their students when they schedule the best start time. It is up to you how you want to handle this.

What's the Point? AKA the Learning Goals & Objectives

To better assist you in understanding the purpose of the Buddy-Up training, below you will find the learning goals and objectives from both a student and library staff perspective. It may be helpful for you to discuss the purpose of the Buddy-Up training with your assigned student assistants. This way everyone is clear on what is expected and why the training exists.

1. The student assistant will acquire working knowledge of the Business Library by participating in the Buddy-Up training.
 - 1.1. Student assistant will demonstrate on-the-job training skills
 - 1.2. Student assistant will detect issues out of the ordinary and report them to library staff
 - 1.3. Student assistant will identify and recommend issues that should be addressed during training and are not
 - 1.4. Student assistant will develop a relationship with library staff during training
 - 1.5. Student assistant will explain their duties to library staff as they perform them
2. The library staff member will implement the student assistant training.
 - 2.1. The library staff member will identify daily tasks that student assistants perform that allow staff to devote more time to their duties
 - 2.2. The library staff member will demonstrate effective library procedures when training student assistants
 - 2.3. The library staff member will develop mentoring relationships with the student assistants they train
 - 2.4. The library staff member will conduct in-depth training with student assistants that
 - 2.4.1 Will identify areas that the student assistant needs addressed
 - 2.4.2 Will illustrate the strengths of the student assistant



During the Buddy-Up Training Process

Equipment needed

- Printed copy of the Buddy-Up checklist
 - This does not need to be in color
- A computer with access to:
 - Student wiki
 - Voyager
 - Business Library website
 - It is recommended to use the computers at either the Front Desk or the Service Desk in the library depending on which parts of the training best fit with those areas
- SMU ID card
 - The student assistant should have his/hers
- Alumni card
 - Borrow an alumni card from the supplies cabinet in the Library Manager's office
- Various areas in and around the Business Library
 - Reserves shelf
 - Storage areas for headphones and markers
 - Study rooms
 - Printers
 - Scanner
 - Photocopiers
 - Kitt Investing and Trading Center (KITC)
 - Mail room

Time to train

Now it is time to start training! Using your printed copy of the Buddy-Up checklist and the equipment listed above; take your assigned student assistants through the material. Duties and/or areas in the Business Library dictate the order of the checklist.

- The Basics
- Service Desk
- Computer/Study Areas
- Emergency Procedures
- Outside the Business Library
- Front Desk
- KITC

The checklist is organized this way to save you time as all the questions pertaining to an area and/or duty are grouped together and listed in a logical order. In other words, less running back and forth between all the areas in the Business Library. You have lots of leeway as to how you and your assigned students approach the checklist as long as everything is covered and the students demonstrates the ability to successfully answer all the questions.

Some recommendations to approach the checklist are as follows:

- Begin the training at the Service Desk.
 - Ask your assigned student assistant to sit at the service desk when their shift starts.
 - This will allow you and the student assistant to start with “The Basics” and to walk around during the training.
- Let the student assistant do the majority of the talking.
 - This is their time to shine and a great opportunity for you to learn from the student.
- Have your assigned student assistants demonstrate how to do things.
 - Instead of listening to them tell you the process, use the equipment and areas in the Business Library and from the surrounding areas, such as Voyager, the cameras, walking around the library, the mailroom, etc., and let them show you how.
 - Not only do you get to see our stellar student assistants in action but also you may find that you learn some new tricks and information.
- Use the order of the Buddy-Up checklist to your benefit.
 - Cover the various areas according to how they are grouped on the checklist.
 - Take advantage when the student assistants are working at either desk to cover those questions.
- Take your time.
 - You do not have to cover everything in one day. Split up the training over a few days.
 - This will ensure that neither you nor the student assistant are overwhelmed and that you can cover every topic to the depth of detail that is needed.

The most important items with the Buddy-Up training are to:

1. Cover all the areas on the checklist.
 - a. Dive deep and discuss why our policies are set up this way.
 - b. It will help the student assistants with memory retention.
2. Assess for student mastery of the areas.
 - a. The Buddy-Up checklist is the rubric.
 - b. It is an all-or-nothing evaluation.
 - i. Do not mark items as complete if you notice that a student assistant has trouble answering specific questions or parts of a question.
 - ii. Quiz them again on a different day so that they have another chance to prove that they now can either successfully demonstrate how to do the task or answer the question correctly.
3. Establish a positive relationship with your assigned student assistants.
 - a. Listen to your student assistants and ask them questions.
 - b. Learn about the student assistants and discover what their interests are.
 - c. The Buddy-Up training provides the opportunity for you to find out if they have any concerns, questions, or need clarification on policies.

- i. We want the student assistants to feel comfortable asking us questions if they are not sure about something.
- ii. If so, share that information with the Library Manager.



SM

After the Buddy-Up Training Ends

Once you and your assigned student assistants have covered all of the material on the Buddy-Up checklists, you will turn in the completed forms to the Library Director. Most often, it is easiest to place the completed checklists in the Library Director's mail tray, which is located on a bookshelf in the Library Manager's office.

Important items to remember before turning in the checklist:

- Make sure that your name and the student assistant's name is filled in on the checklist.
 - Use the blanks provided at the top of the page.
- At this time, you may want to confirm, or re-confirm, with your assigned student assistants that they do not have additional questions, concerns, or suggestions.
 - If they do, use the Student Feedback area of the Buddy-Up Checklist to write down their comments.
- This is your chance to mention any comments, suggestions, or feedback. This includes how the process went as well as suggested changes/improvements you would like to see incorporated on the form.
 - Use the Staff Feedback area of the Buddy-Up Checklist to write down your thoughts.

Congratulations!

You have successfully facilitated a Buddy-Up training session. Please always remember that at any time during the year you can share your thoughts or ideas with the Library Manager.

Questions about this document, ideas, or suggestions for this job aid? Please email majohnson@smu.edu.

BUSINESS LIBRARY 'Buddy-Up' CHECKLIST

Reinforcing Student Assistant Readiness

**Check off each box on the right when Student Assistant demonstrates proficiency on that set of questions.
(Use the bottom of the checklist for additional comments)**

Library Staff Member: _____ **Student Assistant:** _____

The Basics	
How do you access/use the wiki, Lync chat, Voyager (<i>watch for multiple classifications</i>)?	
How do you use the cameras to help you perform your job? How do you increase/decrease the screens?	
How do you look up someone's ID for check out? (<i>trick question – you don't</i>).	
When should you check in (discharge) items that have been given to you by patrons? By fellow staff members?	
Where is lost & found? Who should access lost & found? Where are reserves? Where are supplies?	
How do you reserve a study room? Obtain markers? Headphones?	
What is the Library's main number? Do you have it in your phone in case you need it?	
What should you do if you find that you are going to be late for work?	
What should you do if a fellow student assistant calls and tells you that they are running late for work?	
What are the Library's hours? Where are hours displayed?	

Service Desk	
Where is the Business Library located? If someone calls, how do you direct them to the Business Library?	
How do you answer the phone? Transfer a call? Place call on/off hold? Find a number? Phone directory? How many rings before voicemail answers (<i>4 rings</i>)?	
How do you transfer reference calls to librarians (<i>always use the Ask A Business Librarian line</i>)? Why? How do you transfer calls to other depts. on campus?	
How do you process journals? Dispose of old journals? Where is the mail room? IBD?	

Computer/study areas	
Walk around computer/study areas. Have student assistant point out if anything needs attention. Coach them regarding what you see.	
What are the computer use policies (on all lab computers except quick prints & MM station)?	
How do you put money on an SMU ID (what are the two ways)? Copy Card?	
How do you print a document?	
What do you do when a patron needs to print something but does not have their SMU ID? What if they have no money for a copy card and are running late for class?	
How do you hook up the MMS projector?	

Emergency Procedures	
What do you do if you are talking to a patron and they become upset?	
What do you do if you feel you are in danger?	
What is the phone number for police/fire/ambulance?	
How do you respond to a lockdown emergency? Seek shelter emergency? Evacuate emergency?	
Where are our emergency exits? Which doors do you use when evacuating computer lab? Quiet area? KITC?	

Outside the Business Library	
Where is Cox Technology? How do you get there?	
Where is Maguire? Crow? Fincher? Georges? 175 Crow? Where is 210 Fincher and why? 150 Crow?	
Where is Fondren? How do you get there? Where is the nearest ATM?	

Front Desk	
How do you lock/unlock front doors?	
What do you do with a course evaluation packet?	
What are the procedures for classes in the KITC?	
Bring an alumni card to the SA as ask to check out a KITC Bloomberg, then pod computer – (<i>they should not let you</i>).	

KITC	
What do you do when someone just wants to go into the KITC for a few moments to talk with their friends and promises to you that they will not use a computer?	
Who gets to use the KITC? What are the rules of the KITC?	
How do you turn the technology on/off in the KITC?	

Student Feedback:

Staff Feedback:

Appendix A

BUSINESS LIBRARY 'Buddy-Up' CHECKLIST

Reinforcing Student Assistant Readiness

Check off each box when Student Assistant demonstrates proficiency on that set of questions.
 (Use back of checklist for additional comments, if necessary)

Library Staff Member: _____ **Student Assistant:** _____

How do you lock/unlock front doors? Where is the business library located? If someone calls, how do you direct them to the business library?		What is the phone number for police/fire/ambulance? What is the Library's main number? Do you have it in your phone in case you need it?	
How do you turn the technology on/off in the KITC? Who gets to use the KITC? What are the rules of the KITC?		What do you do if you are talking to a patron and they become upset? What do you do if you feel you are in danger?	
Greeting patrons and maintaining a professional appearance at the desk is #1 priority of SA's. How comfortable are you doing this?		How do you respond to a lockdown emergency? Seek shelter emergency? Evacuate emergency?	
How do you access/use the wiki, lync chat, phone directory, Voyager?		What should you do if you find that you are going to be late for work?	
Where is lost & found? Who should access lost & found? Where are reserves? Where are supplies?		Bring an alumni card to the SA as ask to check out a KITC Bloomberg, then pod computer – <i>(they should not let you)</i> .	
Where is Maguire? Crow? Fincher? Georges? 150 Crow? KIC Scanner? How do you use the Scanner? Copiers?		Where are our emergency exits? Which doors do you use when evacuating computer lab? Quiet area? KITC?	
How do you reserve a study room? Obtain markers? Headphones?		Where is Fondren? How do you get there? Where is the nearest ATM?	
How do switch an iMac lab computer from PC to Mac? From Mac to PC? Where is Cox Technology? How do you get there?		What are the computer use policies (on all lab computers except quick prints & MM station)? What are the Library's hours? Where are hours displayed?	
How do you use the cameras to help you perform your job? How do you increase/decrease the screens? How do you look up someone's ID for check out? <i>(trick question – you don't)</i> .		Walk around computer/study areas. Have student assistant point out if anything needs attention. Coach them regarding what you see.	
How do you process journals? Purge old journals? Where is the mail room? IBD? Where is 210 Fincher?		What should you do if a fellow student assistant calls and tells you that they are running late for work?	
How do you answer the phone? Transfer a call? Place call on/off hold? Find a number? How many rings before voicemail answers (4 rings)?		What do you do when a patron needs to print something but does not have their SMU ID? What if they have no money for a copy card and are running late for class?	
How do you transfer reference calls to librarians (always use the Ask A Business Librarian line)? How do you transfer calls to other depts. on campus?		What do you do when someone just wants to go into the KITC for a few moments to talk with their friends and promises to you that they will not use a computer?	
How do you put money on an SMU ID (what are the two ways)? Copy Card? How do you print a document?		When should you check in (discharge) items that have been given to you by patrons? By fellow staff members?	

Turn in completed form to Library Director by due date.

Time Keeps Ticking Away

BUSINESS LIBRARY 'Buddy-Up' CHECKLIST

Reinforcing Student Assistant Readiness

**Check off each box on the right when Student Assistant demonstrates proficiency on that set of questions.
(Use the bottom of the checklist for additional comments)**

Library Staff Member: _____ **Student Assistant:** _____

The Basics	
How do you access/use the wiki, Lync chat, Voyager (<i>watch for multiple classifications</i>)?	
How do you use the cameras to help you perform your job? How do you increase/decrease the screens?	
How do you look up someone's ID for check out? (<i>trick question – you don't</i>).	
When should you check in (discharge) items that have been given to you by patrons? By fellow staff members?	
Where is lost & found? Who should access lost & found? Where are reserves? Where are supplies?	
How do you reserve a study room? Obtain markers? Headphones?	
What is the Library's main number? Do you have it in your phone in case you need it?	
What should you do if you find that you are going to be late for work?	
What should you do if a fellow student assistant calls and tells you that they are running late for work?	
What are the Library's hours? Where are hours displayed?	

Service Desk	
Where is the business library located? If someone calls, how do you direct them to the business library?	
How do you answer the phone? Transfer a call? Place call on/off hold? Find a number? Phone directory? How many rings before voicemail answers (<i>4 rings</i>)?	
How do you transfer reference calls to librarians (<i>always use the Ask A Business Librarian line</i>)? Why? How do you transfer calls to other depts. on campus?	
How do you process journals? Dispose of old journals? Where is the mail room? IBD?	

Computer/Study Areas	
Walk around computer/study areas. Have student assistant point out if anything needs attention. Coach them regarding what you see.	
What are the computer use policies (on all lab computers except quick prints & MM station)?	
How do you put money on an SMU ID (what are the two ways)? Copy Card?	
How do you print a document?	
What do you do when a patron needs to print something but does not have their SMU ID? What if they have no money for a copy card and are running late for class?	
How do you hook up the MMS projector?	

Time Keeps Ticking Away

Emergency Procedures	
What do you do if you are talking to a patron and they become upset?	
What do you do if you feel you are in danger?	
What is the phone number for police/fire/ambulance?	
How do you respond to a lockdown emergency? Seek shelter emergency? Evacuate emergency?	
Where are our emergency exits? Which doors do you use when evacuating computer lab? Quiet area? KITC?	

Outside the Business Library	
Where is Cox Technology? How do you get there?	
Where is Maguire? Crow? Fincher? Georges? 175 Crow? Where is 210 Fincher and why? 150 Crow?	
Where is Fondren? How do you get there? Where is the nearest ATM?	

Front Desk	
How do you lock/unlock front doors?	
What do you do with a course evaluation packet?	
What are the procedures for classes in the KITC?	
Bring an alumni card to the SA as ask to check out a KITC Bloomberg, then pod computer – (<i>they should not let you</i>).	

KITC	
What do you do when someone just wants to go into the KITC for a few moments to talk with their friends and promises to you that they will not use a computer?	
Who gets to use the KITC? What are the rules of the KITC?	
How do you turn the technology on/off in the KITC?	

Student Feedback:**Staff Feedback:**