

## Supervision and Management Competency Set Portfolio Development Suggestions March 24, 2011

Of all the Support Staff competencies, supervision and management skills are, perhaps, the most difficult for any person to master given the complexities of dealing with people and the myriad issues they bring into play at any given time.

These Portfolio Development Suggestions (PDS) include examples of possible activities you might use to demonstrate your achievements for each competency in this set. These activities or activities that you design yourself will be the primary documentation of your achievements for your online portfolio.

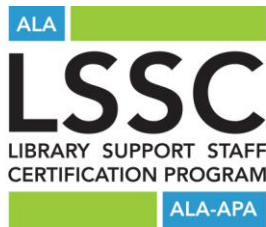
You might recognize some of these activities as experiences you have already had at work. You may also choose to use these as ideas for new self-directed learning projects and ways to demonstrate what you learned.

These are ONLY examples to help you get started thinking about both what experiences you already have related to specific competencies and what new learning you may want to pursue. While you may choose to use some of these suggestions for your Supervision and Management portfolio, you may also choose other relevant activities from your experience or new learning activities to demonstrate your proficiency in each competency.

The goal is to demonstrate that you have achieved the competencies. Your documentation may be a written narrative, a video, an audio recording, or digitized copies of documents you have already prepared in your work experience. You may submit these documents in any format that can be uploaded into your online portfolio. Remember to make a clear link between the competency and the document so that evaluators will know what competency you are demonstrating. When appropriate, you may also apply documentation for one competency to another competency. If so, indicate that in your portfolio.

### Helpful Hints

In order to complete some of the activities you may need to conduct research. This research may be from print resources, web resources, visits to and observations of other libraries, and interviews with library staff or library users. If you need to conduct research to complete one of the activities listed below, be sure to cite the resources that you consulted and your personal opinion of what you learned.



Some of the PDSs ask for a bibliography. Usually a bibliography should include notations that are both descriptive and evaluative. Descriptive means your notation briefly describes what is relevant; evaluative means your opinion about what you read.

In some cases, we suggest that you compare and contrast what happens in at least two libraries or other settings. Compare and contrast means that you identify the similarities and differences between the way different libraries or other settings operate. If you currently work in a library, you may use that library as one of the examples. You may use the same type of library for comparison (public OR academic) or different types of libraries (public AND academic). Unless the suggested activity specifically indicates that you should look for examples in BOTH public and academic libraries, you may choose which types you would like to compare and contrast. You can discover how other libraries operate by conducting online research or by visiting another library and interviewing its staff.

You may also be asked to analyze or describe “your community.” Community is a broad term that could mean the community served by a public library or the higher education community served by an academic library.

### In Summary

In summary, in order to submit this competency set as completed, you are expected to demonstrate that you have achieved each of the 21 individual competencies in the Supervision and Management competency set. However, you are NOT expected to complete any or all of the examples listed with each competency.

Good luck as you achieve this competency set.

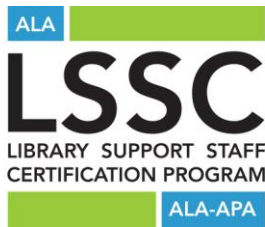
## **SUPERVISION COMPETENCIES**

**Library Support Staff will know:**

**Competency 1. Basic regulations and laws that govern employment; library policies and procedures; and how policies are influenced by local, state, and federal laws and regulations.**

### Portfolio Development Suggestions

1.1 List and discuss eight fundamental employment/labor laws (four state and four federal) and how they impact general library operations.



1.2 Describe how a library policy has been altered in the last five years because of new or modified laws and regulations.

1.3 Collect sample employment policies from at least three different libraries of varying type and size. Compare and contrast these policies. Which ones do you think are best and why? Write a recommendation for adopting specific policies for a library.

1.4 Give examples of the types of legal employment related issues you have encountered while supervising employees and how you have applied or would apply library policies to the situation.

## **Competency 2. Principles of staff management, supervision, and discipline.**

### Portfolio Development Suggestions

2.2 Develop a bibliography with notations that are both descriptive and evaluative with at least 10 items on management, supervision, and discipline issues. Document your reading; identify one theory of management that you would like to put into practice. Briefly describe the theory and explain your choice.

2.3 Interview two library administrators from different libraries to learn about their policies on employee discipline. Get a written copy of the policies they use. Compare and contrast these policies. Which ones do you think are best and why? Write a recommendation for adopting a specific policy for a library.

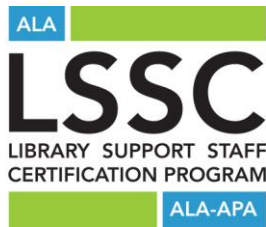
**Competency 3. Participate in recruiting, hiring, training, evaluating, and promoting library staff.** (If you choose to do this activity, you will need to do all five activities described below.)

### Portfolio Development Suggestions

3.1 Prepare a recruiting document for a Support Staff position in a library and a sample list of interview questions. Discuss the connection between the recruiting document and the interview questions.

3.2 Research hiring policies at three libraries of your choice. If you have participated in hiring new employees, describe your own participation and the policies and procedures you followed. What improvements would you suggest to improve the hiring process you used or the hiring process at another library?

3.3 Develop a list of specific questions to be used in interviewing applicants for a particular position. What concrete information would you expect to elicit that would



identify proficiencies and the likelihood of success if you hired this person? Create a video or audio tape or script of mock interviews with job candidates.

3.4 Design a training program for a new employee who will shelve materials. Include a time frame, measures of success and methods of formal evaluation. What instruction or training methods are the most appropriate and effective for the shelver's tasks? What methods would be least effective?

3.5 Research recommended policies to be used for promotion in management literature. Compare and contrast these policies to policies used in at least two libraries of your choice. What recommendations, if any, would you make to the libraries to improve their policies?

#### **Competency 4. Set clear performance expectations linked to the library's strategies and priorities.**

##### Portfolio Development Suggestions

4.1 Create a bibliography of three articles about setting performance expectations. Using what you learned from these articles and any past experience, prepare an annual performance plan for a library employee. Describe how this plan reflects a library's strategies.

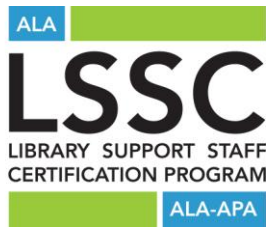
4.2 Create an audio or video tape or a script of a role-play that demonstrates how you would set performance expectations with an employee. Include how you would coach the employee if he or she did not meet expectations.

4.3 Interview two library administrators from different libraries to learn about libraries' methods of linking expectations for employees to their library's strategic directions. Compare and contrast these policies. Which ones do you think are best and why? Write a recommendation for adopting a specific method for a library.

#### **Competency 5. Demonstrate leadership in a team environment.**

##### Portfolio Development Suggestions

5.1 Give specific examples of how you have demonstrated leadership in a major project or initiative at a library. What worked well in this project or initiative? What would you do differently next time? What are your particular leadership skills that help a team succeed?



5.2 Identify three leadership theories. Based on your experience, choose one theory of leadership that you would like to put into practice and how. Briefly describe the theories and explain your choice.

**Competency 6. Plan, implement, and encourage participation in staff development activities.**

Portfolio Development Suggestions

6.1 Describe your role in developing staff improvement activities at a library, or prepare a plan for a specific staff development activity. Your description of the plan should include an agenda, budget, work assignments, goals, and how the activity is evaluated.

6.2 Give one example of how you identified staff training needs and developed a training opportunity to meet that need. Describe why you chose the method of training and how you encouraged staff to participate. How did you evaluate the training?

6.3 Interview two library administrators from different libraries to learn about their policies on staff development. Get copies of these policies. Compare and contrast these policies. Which ones do you think are best and why? Write a recommendation for adopting a specific policy for a library.

**MANAGEMENT COMPETENCIES**

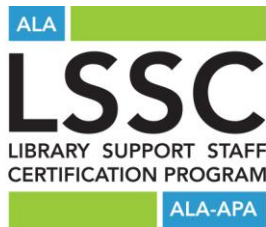
Library Support Staff will know:

**Competency 7. The value of written, approved policies and the difference between policies and procedures.**

Portfolio Development Suggestions

7.1 Interview two library administrators from different libraries to learn their opinions about the value of written policies and the differences between policies and procedures. Compare and contrast these opinions. Which one do you agree with and why?

7.2 Identify a recent policy change that impacted public service in a library. Who approved the change, why was the policy changed and what was the impact on library users and staff? Was there resistance to the policy change? What suggestions do you have for future policy changes?



## **Competency 8. The basic purposes and concepts of budgeting, grant writing, and fundraising.**

### Portfolio Development Suggestions

8.1 Develop a bibliography on financial development strategies for a library. Describe your work in the fundraising efforts at a library. What tactics did you use and why did you choose them? Evaluate the effect and success of these tactics. What would you do differently next time?

8.2 Prepare a promotional piece that could be used for fund raising or for a grant proposal to build a new branch or an addition to an existing library building. The piece should include the need for the building and how the library users would benefit. In a separate document, list ways of raising funds for the building. One method should be by applying for a grant. Explain the key elements in writing a grant to obtain funding for the building project (you do not need to write the grant itself).

8.3 Describe how a library creates its budget plan. What is the philosophy behind the budget development? Are staff involved and, if so, how? Describe how a library uses grant and other funds in its budget plan.

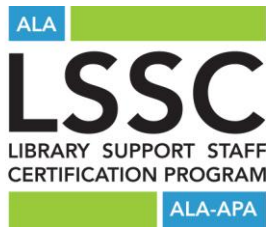
8.4 Describe a budget you created or monitored for a project. Discuss the process of creating or monitoring that budget and its components, its implementation, and any problems encountered implementing it and how you measured and evaluated its effectiveness.

## **Competency 9. The value of planning library services based on community demographics and needs and evaluating these services.**

### Portfolio Development Suggestions

9.1 Investigate the demographics of the community of a public or an academic library. Based on your findings, describe a library service that would meet the needs of one major group in the community. What would be the goals and objectives for these services? How would you measure if the goals and objectives were met?

9.2 Examine a library's long-range plan. Identify and discuss how the planners identified the community demographics, assessed needs, and plan to evaluate the plan's success.



9.3 Develop a bibliography on methods of long range planning. Identify one theory of planning that you would like to put into practice. Briefly describe the theory and explain your choice.

**Competency 10. Principles and the value of cooperation and collaborating with other libraries, agencies, and organizations.**

Portfolio Development Suggestions

10.1 Describe two collaborative efforts of your library, one with another library(ies) and one with a community agency or organization. What was successful about each of these collaborations and how could they have been improved? What is the value of these collaborations for the library user? What are the barriers to successful collaborations and what factors make the collaborations successful.

10.2 Choose a cooperative relationship between a library and another organization. Interview a staff person in each organization and summarize their opinions about the advantages and disadvantages of the relationship.

10.3 Identify potential cooperative endeavors that a library might begin. What would be the value of these relationships for library users? What are the principal issues that would need to be addressed and what factors would help ensure success? What issues would need discussion and resolution to achieve success?

**Competency 11. Principles of marketing the library and its services.**

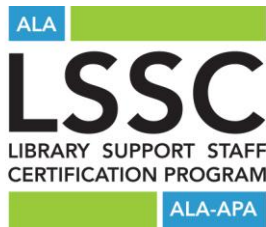
Portfolio Development Suggestions

11.1 Provide examples of significant promotional pieces that you have prepared for promoting programs and activities at a library. What were your goals in developing these marketing tools? How would you evaluate the success of these tools?

11.2 Prepare a list of basic marketing principles that all libraries should follow to promote themselves. How would you incorporate these into a marketing plan for a library?

11.3 Develop a bibliography on marketing. From your reading, identify one theory of marketing that you would like to put into practice. Briefly describe the theory and explain your choice.

**Library Support Staff will be able to:**



**Competency 12. Develop realistic goals and measurable objectives after careful consideration of benefits, risks, and impact on library current and future needs.**

Portfolio Development Suggestions

12.1 Research basic elements in a strategic plan for a library (if a public library, research the planning processes developed by the ALA Public Library Association). From your research, prepare a detailed and comprehensive outline of all the elements and steps in strategic planning. Write at least one goal, objective, and measurement for a library.

12.2 Plan a new service or program for a library. Develop goals and measurable objectives for this service. Discuss the service's benefits to the library and its users. Identify potential risks for the library. What factors prompted the development of this new service?

12.3 If you work in a library that has a long range or strategic plan, evaluate its progress thus far with particular emphasis on how progress is measured. What kinds of measurements are being used? How might you change them?

**Competency 13. Develop, implement, and evaluate recommendations for new services and programs based on analysis and interpretation of data about various aspects of library operations.**

Portfolio Development Suggestions

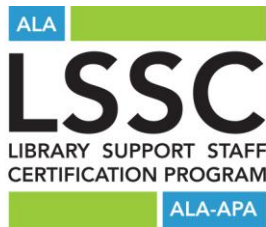
13.1 Discuss your role in a library implementing new programs either of your own initiative or ones delegated to you. Describe, in detail, the process you would follow to develop, implement, and evaluate new services and programs at your library.

13.2 Plan a new service or program for a library. Place yourself in the role of decision-maker and use data about your library to make recommendations to implement the program. Present advantages and disadvantages to implementing the program and defend your final decision.

**Competency 14. Review existing and develop new policies and procedures.**

Portfolio Development Suggestions

14.1 Review three similar policies in two different libraries. Provide commentary on issues you see as problems for the libraries based on the policies as written. Develop



revisions to those policies and suggest new policies that you believe should be enacted to better the libraries you have chosen to review.

14.2 Give specific examples of when a library needed to change an existing policy or procedure. Describe the process used and your role in the process.

**Competency 15. Develop and implement a marketing plan for the library and evaluate its effectiveness.**

#### Portfolio Development Suggestions

15.1 Research what elements should be in a marketing plan. Prepare a detailed outline for a marketing plan for a library. If your library has a marketing plan, evaluate it in light of your research. Provide a descriptive and evaluative analysis of the marketing plan.

15.2 Choose one library program or service and write a marketing plan for that program or service. Include an evaluation component.

**Competency 16. Build positive relationships between staff and users, applying concepts of user-oriented customer service.**

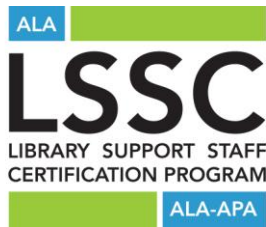
#### Portfolio Development Suggestions

16.1 Identify and describe five important elements of customer service. Indicate the sources of your information. Rank the five elements in order of importance and indicate why you put them in that order. Discuss if the elements and rank would be different for a different type of library or a library of a different size.

16.2 Video or audio tape or provide a script showing examples of poor customer service and good customer service. Describe the differences.

16.3 Visit three retail stores, including a book store. First observe and experience their customer service and then interview a manager to learn their customer service policies. From this experience, describe one new customer service initiative that might benefit a library and discuss how and why it might be effective.

16.4 Describe what communication skills you believe are most important in working with library users. Give specific examples of how you use these skills in speaking with different types of users, based on differences such as age, gender, and disabilities.



**Competency 17. Demonstrate the ability and willingness to uphold policies and decisions and know when exceptions are appropriate.**

Portfolio Development Suggestions

17.1 Provide examples of times when you have made significant exceptions to existing library policies and explain in detail why it was appropriate for you to do so. Discuss your philosophy for upholding and for overriding policies.

17.2 Give an example of when you upheld and enforced a policy or decision with which you may have disagreed. Why was this difficult for you? Explain if you discussed your disagreement with the policy with your supervisor. If not, why not?

**Competency 18. Use appropriate strategies to deliver difficult or sensitive information.**

Portfolio Development Suggestions

18.1 Prepare a written warning and a written statement terminating an employee for insubordination. These two documents should be directed to the employee. Illustrate how best to deliver them and what to avoid in such an interaction. You may provide a video or audio tape or written script of how you would handle such a situation.

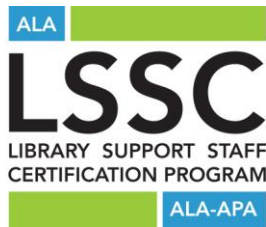
18.2 Describe and explain your choice of strategies that you would use in each situation: You observe a co-worker being rude to a library user; you must tell your supervisor that a program is not meeting its objectives; and you must lay off an employee. You may provide a video or audio tape or a written script of how you would handle one of these situations.

**Competency 19. Identify community and user demographics and assist in planning library services based on those demographics and needs.**

Portfolio Development Suggestions

19.1 Compare and contrast library services that you would offer to an isolated, agricultural community of 7,000 people with services you would offer to a city of 1,000,000. Or, do the same for library services that you would offer at a community college with 4,000 students with a university with over 25,000 students.

19.2 Develop a bibliography on demographic resources for your community or academic environment. Which two of these resources do you think are most helpful for library planning and why?



19.3 Describe your role in a library planning process that required identifying community and user demographics to use to develop services or programs. Choose two services or programs in a library and describe its user's demographics and how they impact these services or programs.

19.4 Think of a particular new service you might like to implement in a library. Describe different strategies that could be used to ensure that all the stakeholders (those who can influence or who are impacted by a decision) are involved with the planning process. List three benefits of including stakeholders and three negative consequences of not including stakeholders. If you have already implemented a project, describe how you might have involved stakeholders differently.

#### **Competency 20. Request, defend, and follow a budget for library activities.**

##### Portfolio Development Suggestions

20.1 Describe your experiences in a library where you have prepared a budget and presented it to a board, council, department head, or other group of library leaders. Discuss the process that you went through to establish the budget and get it approved. Describe the ultimate outcome for that budget year and how you addressed unexpected financial difficulties or conflicts.

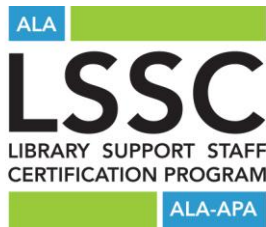
20.2 Develop a request for an increased budget for an existing service or program. Prepare the rationale for your request and present your proposal to a librarian. Encourage questions and be ready to define your request. Ask for feedback and revise your proposal.

#### **Competency 21. Conduct meetings effectively and efficiently.**

##### Portfolio Development Suggestions

21.1 Research good meeting management and describe key principles that lead to productive meetings. Give three examples of meetings that you regularly attend and apply the principles of good meeting management to these meetings. Develop an action plan to improve these meetings.

21.2 Develop a bibliography on the topic of managing meetings. Identify and promote one method of managing meetings.



21.3 Describe a meeting that you conducted. Include the agenda for the meeting. What worked well and what needed to be improved? Did the meeting go as expected? Were all of the agenda items covered? Develop a plan to make improvements.