STRATEGIC HIRING:

A GUIDE TO STAFF RECRUITMENT

LIBRARY DEVELOPMENT GUIDE #1

Strategic Hiring: A Guide To Staff Recruitment

The Library Development Guide #1

The Library Development Guide Series

DISCLAIMER

This guide provides general information on staff recruitment for public libraries in Ontario. It is not intended to be a replacement for professional legal or other advice and should not be relied upon for such advice.

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1. INTRODUCTION

Selecting and hiring staff is one of the most stressful tasks a library manager undertakes because it forces us to put our own judgement about people on the line in a way that few other life experiences do.

This guide suggests some processes and approaches but it cannot provide a template for you. There is no one "right way" to select and hire staff. However, there are both legal and ethical parameters and there is the overriding necessity to exercise your judgement with deliberation and care so that the results will advance your library's ability to accomplish its mission and goals.

As you read, consider your opportunities to make changes in process and in policies even if you don't have a current job vacancy on your horizon. There are many places to start. Advance preparation for selection decision-making affects your organization's culture and expectations for change all by itself.

Staff recruitment and selection is an area in which the CEO can feel very much alone. It is important to preserve confidentiality and fairness in a selection process, but when there is a small number of staff, and the community is small, the CEO will have limited opportunities to confer with another person. This guide is written in a very personal voice. It is our hope that this will not only make the document easy to read and act on but also make it a welcome companion over a cup of coffee (or herbal tea) when you are embarking on a staff selection task at some time in the future. We hope it will help you make successful selection decisions or help you frame a problem in general terms so that you can talk it over with a SOLS consultant or some other trusted colleague.

The primary author of this guide is a former CEO of several public library systems in Ontario and the consultants on the advisory panel have expertise in providing advice to public libraries. We have shared our experience in developing this document but we know that there is no single right way to proceed in this management area. Don't let that intimidate you. Staff recruitment and selection is the area in which a CEO can have more impact on the success of a public library in meeting the needs of its community than almost any other in the CEO's job description.

1.1. Who Is the Guide For?

This document is intended as a guide to managing the personnel areas of recruitment and hiring. Its primary audience is the CEO in smaller sized libraries in Ontario but any library manager embarking on recruitment and selection work may find it useful.

There are varied frameworks for the management of public library service in Ontario. While most public libraries are constituted under a single municipality; some others are not. Governance contexts include:

- Union public library boards.
- County public library boards.
- First Nation programme administrators, library committees or band councils.

This variety in governance has two implications for the guide and its readers. The first is an awkwardness of language if all variations are noted repeatedly. For that reason, the guide applies some conventions for frequently used terms. The governing body, in whatever variation it exists, will be referred to as the library board or simply the board. Similarly, the administrator directly responsible for the library service will be referred to as the CEO (chief executive officer), notwithstanding the variety of titles possible for that person—chief librarian, library director, library manager, etc. The terms municipal or municipality and First Nation community or band are used distinctly in this document to refer to governance entities different in nature.

The second implication is that you, the reader, must take your particular context into account in implementation. No guide can tell you exactly how to act in your own situation. As CEO, you are always responsible for looking at the wider library community, seeking good advice, and adapting it to your own library circumstances.

1.2.   What Does the Guide Include?

Each section covers part of the recruitment function, giving some context and a general description of how that phase unfolds in a selection process. You will have to make adjustments for application in your particular circumstances but this account shares our knowledge and gives you a place to start.

Many sections of this guide end with suggestions for additional materials. The heading "Highlighted Resources" will link you to materials included in the Appendix of this guide or available on the web. We suggest that you review any such highlighted resources for topics that you are working on in your library. "For Further Reading" means just that. You don't need to read these materials before you start working at an area for improvement but they may help you look at the big picture or help you look at your own library organization from a new perspective. You can think of them as the 'readers' advisory' component of this guide. How could a librarian resist?

2. THE BIG PICTURE

Being the person responsible for the decision about who will fill a vacancy on your library staff can feel overwhelming. Especially in small libraries, you are aware that everyone in the community knows who works where and knows when there is an opening on the local library staff. Sometimes it can feel as if there is a whole crowd looking over your shoulder and waiting for your decision. That sense of community ownership is one of the strengths of your library. Don't let it turn into pressure that becomes negative and limits the scope of your thinking about the decision before you.

2.1. Human Work

Employee selection is human work, subject to both the power and the limits of our judgement and communication with others. There are a variety of factors to be taken into account both about how the job fits into the overall library operation and about how to assess the relative merit of a group of possible job candidates. As CEO the community pays for your careful judgement about library management but rarely is it as personal as when selecting new staff.

On the one hand we urge you to keep things in perspective and give yourself a break. No two managers bring exactly the same experience to a situation and no two will exercise their judgement in exactly the same way. No one expects you to suddenly develop superhuman perception about the character of virtual strangers. Everyone simply expects that you will exercise your best judgement thoughtfully, through a fair and open decision-making process.

On the other hand, we urge you not to let yourself off the hook easily. Don't let your personal comfort level with the *status quo* limit your assessment of the library's needs into the future. Don't hold back from probing for evidence of the experience and skills your library team needs. Plan your procedures and your decision-making process carefully and then work your plan. No other management responsibility of a CEO is more important than staff recruitment and selection. The rewards are more than worth the effort.

2.2. CEO and Strategy

The most important responsibility of the library board is to establish a mission and goals for its public library. The library board and CEO share the responsibility of determining a strategy for accomplishing that mission and those goals.

The most important responsibility of the CEO as leader of the organization is to align its resources with the strategy. Leaders of large organizations pay attention to strategic alignment because it is so obvious that parts of a large organization can get "out of sync" with one another. Leaders of smaller organizations sometimes pay too little attention to strategic alignment because they take it for granted.

You may not be familiar with the term strategic alignment but the concept is widely accepted. We talk about the need for everyone to sing from the same song sheet or everyone to row in the same direction. These expressions reflect our understanding that a group is more effective when it shares an understanding of what it is trying to accomplish. A public library is more effective as an organization if its resources are focussed on commonly understood goals and a shared mission.

2.3.   Resources and Strategic Alignment

Making decisions about the use of resources is how an organization puts its strategy into action and public libraries are no different. The consequences of our decisions are perhaps more important in public libraries, however, simply because we work with such scarce resources and such restricted budgets. In fact, the annual budget for a public library is a snapshot of its current decisions for how to use its resources for the accomplishment of its mission and goals.

CEOs make decisions as managers or provide expert advice as input to decisions by library boards on the use of resources that make up the infrastructure of the organization. The infrastructure of a public library organization falls into three major areas: its physical facilities, its collection resources and its human resources or staff.

Some CEOs have an opportunity to plan a new library building or a major renovation. The planning discussions for such projects are one of the occasions when we are very aware of making decisions that align with the organization's strategy. How much space should be allocated to various service functions and collection materials? There is no one right answer; it depends on the specific mission of the library and the goals it has set for the new facility. Decisions about buildings come relatively seldom and we are aware as we proceed that we must align our facility plan with our strategy.

On the other hand, decisions about what titles to add to the collection are made frequently and involve comparatively minor expenditures. We tend not to think of each of the decisions to select or not select a particular title as strategic decisions. We make a large number of such decisions and we will make more next month. No single decision is big enough to throw a library off its strategic line. Cumulatively, however, these decisions determine how a library collection develops and whether that development aligns with the library's strategic direction.

The third aspect of a library's infrastructure, its staff, also involves decisions about use of resources. Here, your decisions have both a long-term and a cumulative impact and it is important to keep strategic alignment in mind as you make them. Continuous improvement involves continuous openness to change, performance monitoring and small adjustments. Less frequent decisions about how the library staff team will develop have a much longer term impact.

Busy library managers can too easily see a staff vacancy as a problem to be fixed. It is really much more like the approval to plan a new building—an opportunity to make a major decision about your library's internal infrastructure that directly relates to accomplishment of the mission. The recruitment decisions you make should advance your organizational strategy.

Highlighted Resources

Todaro, Julie Beth. "The Effective Organization in the Twenty-First Century." *Library Administration & Management* 15.3 (Summer 2001): 176-178. *Library Literature & Information Science Full Text*. H.W. Wilson. Available[1] through the Ontario Library Association web site: <<u>http://www.accessola.org/members/</u>>
A short discussion of the big picture for library administration.

For Further Reading

Mintzberg, Henry. "Crafting Strategy." *Harvard Business Review* 65.4 (July August 1987): 66 75. *Business Source Elite*, Ebscohost.
Mintzberg is Canada's own guru on corporate strategy and this is a classic article in the business literature.

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[1] The Ontario Library Association provides access to the WilsonWeb *Library Literature & Information Science Full Text* journal database for members of the Association. You will need your OLA membership number to log on to the members' only area of the OLA web site.

3. RECRUITMENT NEVER STOPS

3.1. Be an Organization that Appeals to the Best Employees

Staff recruitment is an organizational activity that never stops and never goes away—even if you have no current job vacancies and no near-term expectation of a job vacancy. That is simply because people draw conclusions about an organization based on its reputation, its 'image' and publicity, the contacts they have with the organization as customers and what their friends and neighbours have to say about it. These impressions make a difference in whether you attract the best candidates to any recruitment process. The overall impression of your library can make the difference between the best candidates deciding to apply for a job or not. It can even make a difference in whether or not the best candidates notice your job advertisements.

Your library's reputation and image are important to your recruiting efforts in two different forums. The first is your local community. Members of the community will have an overall impression of whether your library is a good place to work based on the customer services they receive as users of the library, on past news reports and publicity about the library and on what their acquaintances say about it. The very best way that you can affect this community impression of the public library as a workplace is to take all the steps as a CEO that ensure excellent, flexible and responsive public services. The efforts you make to improve public service are, indeed, part of your recruitment efforts (and *vice versa*).

The second forum in which your library's reputation matters is the library community. This is affected by your involvement with other library workers in several forums. Library people will have an impression of your library based on whether you and your staff attend and participate in meetings or forums regularly, whether you participate on electronic discussion lists and whether your concerns focus on service-improvement or crisis fire-fighting. They will also draw conclusions about your library's commitment to staff development based on whether they see you or your staff at meetings or workshop sessions. Even for smaller libraries, actions speak louder than words. Reputation in the library community can affect the quality of candidates who apply for positions requiring library experience and training.

The best employees want to work for the best organizations. They look for evidence that current employees believe in their mission, take pride in their work, are allowed to participate in the development of the organization and are given an opportunity for continuing education and development. The best way to attract the best candidates is to be an organization that the best want to work for. Seek excellence, stretch your limits, and value the elements of continuous improvement in both work processes and public service. Doing those things is probably the most important step you can take to influence your library's reputation and improve your ability to recruit the best employees for your library.

3.2.   The Best Employers

Excellence in public library service is outside the scope of this document but it may be appropriate to note some of the factors that make an organization known as an excellent employer.

Board Sense
As CEO, you cannot accomplish a "best employer" status on your own. It is founded in the actions and policies of the board. Continuous improvement in this area depends on a successful partnership between you and your board. Pay attention to board meeting agendas. Work with the board chair to contain routine business so that your board has time to discuss not only library service development but also development as an employer of choice.

Consult an annual employer rating publication to see what is regarded as desirable and what the emerging trends in employee satisfaction are. Despite the fact that ratings are primarily of large organizations and companies, scanning the entries will give you an idea of what factors are considered. Such a review should help you to think of your own organization as a product that you have to sell to prospective employees. What does your organization look like to an outsider considering places to work?

The best employers:

- Value their employees and demonstrate it.
- Pay competitively with similar organizations and equitably within the organization.
- Provide opportunities for employee learning, development and advancement.
- Give clear feedback about job performance and coaching for improvement.
- Have a clear vision of the organization and its goals and communicate it to all employees.
- Monitor organization performance and involve all employees in overall performance improvement.

Highlighted Resources

Deiss, Kathryn J. "The Shared Leadership Principle: Creating Leaders Throughout the Organization." *Leading Ideas* 2 (May 1998). The Association of Research Libraries Office of Leadership and Management Services.
<http://www.arl.org/diversity/leading/issue2/shared.html>
New skills of both leadership and followership are needed in effective library organizations.

Hayes, Jan, Maureen Sullivan and Ian Baaske. "Choosing the Road Less Traveled: the North Suburban Library System Creates a Learning Organization." *Public Libraries* 38.2 (March/April 1999): 110-114. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through the Ontario Library Association web site: <http://www.accessola.org/members/>
One library transforms its organizational culture to become a "learning organization".

For Further Reading

Manville, Brook and Josiah Ober "Beyond Empowerment: Building a Company of Citizens."
Harvard Business Review 81.1 (January 2003): 48-53. *Business Source Elite*, Ebscohost.
Explores an historical model of community commitment for organizations of knowledge workers.

Yerema, Richard W. *Canada's 100 Top 100 Employers 2003*. Toronto: Mediacorp Canada Inc.,
2002.
A guide to Canada's best places to work. Published annually since 2000.

4.   RECRUITMENT IN CONTEXT

Before reviewing the processes of staff recruitment in libraries, we need to be aware of the broader context. Employment is such an important factor of personal freedom in our society that there are legal and ethical constraints on job selection decision-making. Understanding the context helps us keep our own actions and decisions within the constraints.

4.1.   Legal Matters[2]

The areas of staff recruitment and employee relations involve the law more than any other area of public library management. Moreover, compliance with the law isn't something in which "good enough will have to do". The manager of a smaller library system has just as much responsibility to ensure that the organization acts within the law as does the manager of a big city system. As CEO, you are an officer of the board and you have all of the obligations and accountabilities that go with that status.

You shouldn't be overwhelmed by that but you must take it very seriously. The first thing is to be aware of the law. Several relevant statutes are noted here in this section with very brief notes of their relevance. This is not intended as a full briefing but only an overview. As each item of legislation is discussed, a hyperlink is provided. All of these statutes are available on the government web site and links are provided in the Highlighted Resources section.

Most statutes that apply to recruitment and hiring in Ontario public libraries are provincial ones and we will start with the most important and far-reaching one.

Human Rights Code

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90h19_e.htm

This Ontario statute governs all of your staff recruitment processes but also all other personnel management in your library. One section is fundamental to understanding many of the process suggestions we make in this guide. Section 5(1) is quoted here in full.

> Every person has a right to equal treatment with respect to employment without discrimination because of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, age, record of offences, marital status, same-sex partnership status, family status or disability.

When you read the Act, be sure not to miss Section 11 on indirect discriminatory factors and the expanded treatment of employment matters outlined in Sections 23 and 24. Ensure that your processes and practices comply, both directly and indirectly. For example, you cannot make determinations in any aspect of employment based either on age or on what popular music a person listened to as a teenager. The first is direct and the second is an indirect determinant of age.

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[2] This section on law and legislation applies in its entirety to municipal public libraries. It does not apply as completely to First Nation public libraries and the degree of application may vary. Statutes with the word municipal in their title are not applicable at all. First Nation CEOs may wish to consider this section and subsequent notes on "Legal Matters" not as legal constraints but as possibly relevant background for alternate handling of similar ethical issues. You should consult with your community administration about details.

The Ontario Human Rights tribunal maintains a web site and has published both a summary related to hiring at: http://www.ohrc.on.ca/english/guides/hiring.shtml and a *Guide to the Human Rights Code* at: http://www.ohrc.on.ca/english/publications/hr-code-guide.shtml

Employment Standards Act

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/00e41_e.htm

This is Ontario's basic labour legislation on terms of employment and it governs many of the conditions of work for all library employees. Additional information on specific subjects covered is available at the Ministry of Labour web site http://www.gov.on.ca/LAB/english/es/guide/ along with an extensive guide in PDF format.

Probationary Period: The Act calls for specific notice requirements for termination of those employed for three months or longer. The probationary period for new employees is commonly considered to be the term during which the employer can terminate the new employee without cause and without notice if things are not working out. If that is what you want your use of probationary periods to mean, then you are effectively limited to a probationary period of three months or less. That should be long enough in most situations. Make sure that your policies and offer letters are consistent. If you want to specify a longer period along with specific notice periods for termination, you should get legal advice in drafting the contract terms.

Minimum Age of Employment: You would expect the *Employment Standards Act* to set out the minimum age of employment but Ontario's does not. We will note it here, however, because the matter is dealt with in a very scattered way. Federal legislation, the *Canada Labour Code*, prohibits children under 17 working if provincial legislation requires them to be at school and prohibits them working between 11 p.m. and 6 a.m. Ontario's *Education Act* specifies that a child under 16 is required to attend school and cannot be employed during school hours. Other provincial legislation sets higher minimum ages for specific kinds of work (logging and factory work). Regulations under the *Occupational Health and Safety Act* stipulate that only children aged 14 and older can be employed in general workplaces such as public libraries.

Pay Equity Act

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90p07_e.htm

This statute requires municipal libraries to establish plans to accomplish pay equity for female job classes and then to maintain pay equity in accordance with the job evaluation process used in the plan. Ontario's Pay Equity Office provides a web site of useful information at http://www.gov.on.ca/LAB/pec/peo/english/index.html. You can sign up for seminars or order publications through the web site.

The Act comes into play in situations in which a library establishes new job positions or undertakes a major change in its pay schedules. A well-designed and consistently applied job evaluation process will meet pay equity requirements but it will also help a library monitor and respond to overall compensation concerns such as internal equity (fair pay across jobs within the organization regardless of them being female job classes or not) and market equity (fair pay in comparison to similar jobs in other organizations).

Municipal Freedom of Information and Protection of Privacy Act

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90m56_e.htm

Public libraries are very much aware of this legislation for protecting the privacy of the borrowing records of library users. Both aspects of the legislation also apply to staff recruitment. You have an obligation to keep the personal information that you collect on job applicants private and to use it only for the purposes of making a determination on possible employment.

The records of your recruitment processes, however, are part of your library's operational record and the public may consult them as public documents under the terms of the *Public Libraries Act* as well as this freedom of information statute. Both aspects should be kept in mind as you create and file records in your recruitment and hiring processes.

Municipal Conflict of Interest Act

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90m50_e.htm

This Act defines the conflicts of interest that a councillor or library board member is required by law to declare. It includes definitions of pecuniary interest and establishes the family relationships that are involved in indirect interest of the board member. You will want to consult this statute before framing the "hiring policies" required of libraries under the new Municipal Act.

Public Libraries Act

http://www.e-laws.gov.on.ca/DBLaws/Statutes/English/90p44_e.htm

This, of course, is the provincial legislation under which municipal public library boards are created and all public libraries are provincially funded. It grants specific and limited authority including authority to a board to appoint and remove employees and to determine the terms of their employment. It also specifies that the board shall appoint a CEO to have general supervision over and direction of the library and its staff. The board is a corporation and both the board members and the CEO are officers of the corporation with the legal duties that go along with that status.

Awareness of the Legal Context

This overview has noted some of the most likely areas in which the law applies to staff recruitment activities. Your awareness should really be deeper than just this outline.

> **Legal Matters**
> The law relates directly to several activities in staff recruitment. As you read the rest of this document look for such specifics in a highlighted note such as this one.

Our recommendation is that you get copies of each of the statutes above and read them through. This isn't intended to make you a law expert but simply someone who knows when to throw a flag on the play, find the applicable law, read the words again and, if necessary, get more advice before proceeding. Yes, reading legislation is deadly and much of the language is convoluted. We urge you to do it anyway. You don't have to take in all of the details and remember them but you do need to raise your awareness level. Firstly, you need the "little bell" to go off in the necessary circumstances, sending you off to look up the exact words and comply with the law early in the development of any potentially sticky situation. Secondly, you need the confidence that such awareness gives you.

Unionized Workplaces

This guide does not deal specifically with unionized workplaces but much of it applies just as readily to libraries with unionized employees as to those without. If your employees are members of a union it is your responsibility to know your collective agreement inside and out. It is both a contract and a key legal parameter in your workplace. Keep that in mind as you use this guide and adjust to fit your own circumstances as necessary.

The most important difference is really that the collective agreement sets out negotiated arrangements for working conditions that would otherwise be covered in library policies.

Highlighted Resources

Ontario. Ministry of Citizenship. *Paths to Equal Opportunity*.
<http://www.equalopportunity.on.ca/eng_g/index.asp>
This site can be a starting place but be prepared to seek advice from multiple sources. Try browsing in the Gateway to Diversity sections or search for 'Job Accommodation' in the A-Z Index. Pursue resources relevant to your particular situation.

Ontario. Ministry of Consumer and Business Services and Ministry of the Attorney General. *e-Laws*. <http://www.e-laws.gov.on.ca/home_E.asp?lang=en>
All provincial statutes are available through this site as well as bills tabled before the Ontario legislature. Keep it handy.

Ontario. Ministry of Labour. *Your Guide to the Employment Standards Act*.
<http://www.gov.on.ca/LAB/english/es/guide/>
Available for searching directly or as a PDF document.

Ontario. Pay Equity Commission. <http://www.gov.on.ca/LAB/pec/peo/english/index.html>
Information on publications and training seminars.

Ontario Human Rights Commission. <www.ohrc.on.ca>
Check the two sections entitled Hiring and Publications.

Ontario Human Rights Commission. *Hiring? A Human Rights Guide*. March 19, 1997.
<http://www.ohrc.on.ca/english/publications/hiring-guide.pdf>
Explains some of the application in practice of the legal protections under the Human Rights Code.

Ontario Screening Initiative. *Ontario Law and Social Policy: Implications for Screening.*
Volunteer Canada. September 2002.
<http://www.volunteer.ca/volunteer/pdf/Ontario_law_&_sSpolicy_nolo.pdf>
This is a background paper on the subject of screening but it provides a useful overview of the legal context for recruitment and selection.

5. POLICIES AND PRACTICES

Part of your preparation for staff recruitment is to examine your library's policies and practices. Are they comprehensive and up to date? Are they ethically sound? Are they applied fairly in practice?

While it is the library board's responsibility to adopt policy, you should monitor issues and bring recommendations forward for their deliberation. Both you and your board should start to give serious consideration to the consequences of the extensive wave of retirements expected among library workers in the next five to ten years. The labour market has been favourable to employers for so long that it is almost taken for granted. Where will your library recruit skilled staff for its future? Do you need to revise policies to make it a more attractive workplace to attract candidates? Are your compensation policies competitive? Do you need a staff development plan and more financial support for employees in continuing education?

5.1. Personnel Policies

The personnel policies of the library cover the working conditions for employees such as working hours, pay, vacation entitlement, etc. These policies are usually separated into a distinct policy document because it must be kept up-to-date rigorously and must be duplicated and made available to each employee. Unionized workplaces will have a collective agreement for unionized staff that fulfills this purpose but should have another document for employees not in the bargaining unit.

Have all of the various decisions that involve employees been gathered into a personnel policy document? Is it clearly written and indexed and easily consulted? Is it up-to-date? If your policies refer to the personnel policies of your municipality or First Nation community, do you monitor those linkages frequently to ensure accuracy[3]? Time spent in ensuring that you can answer an unqualified yes to those questions is time well-spent in preparing to recruit staff. You will need this document to give to finalist job candidates as a full description of the library's policies that they would be agreeing to in accepting a job offer.

Just as important, you need to know that these policies are up-to-date and complete so that you can answer questions from job candidates quickly and accurately. The library's compensation policy and pay schedule will obviously be a key concern. You should assist in the regular review of this policy by monitoring compensation in comparable libraries and in comparable jobs in your community. If a library wants to provide high quality public services it must provide salaries that will attract excellent employees and keep them on staff.

The library's compensation plan must also be internally fair and responsive to change. Municipal public libraries are required to comply with Ontario's pay equity legislation and can use that effort to ensure regular job evaluation and pay adjustment in response to changes in job responsibilities. Review your pay equity compliance processes and, wherever possible, use those processes to achieve not just gender equity but overall internal pay equity. Fair compensation for work in an organization is one of the factors that makes it a desirable place to work and influences its overall reputation.

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[3] The board, as employer, should have a process in place to be aware of and provide input to any changes in shared policies that are considered by the parent organization.

5.2.   Work Practices

Policy only goes so far in setting a structure for the workplace. Your work practices have an even greater effect on your organization's culture. Take a review of things as someone on the outside would; try to look through the eyes of a potential new employee.

In smaller work groups, flexibility in work scheduling can be even more important than work hours. The early afternoon for a child's school performance or the changed Saturday for a family event out of town is the kind of thing that matters to everyone. Sometimes the schedule just cannot stretch to accommodate changes but, if everyone is willing to be flexible, accommodations are usually possible. It says a great deal about a work culture if schedule adjustments are not equitably accessible to everyone. Vacation scheduling and access to continuing education are other areas to consider. Overall, "the way we do things around here" can get stuck in unexamined restrictions from the past. Take a fresh look for fairness, equity and good humour.

6. GUIDING PRINCIPLES FOR RECRUITMENT

Making your library a great place to work, and also known as a great place to work, means having a clear vision of its future success, a widely-understood mission, and performance goals that both the board and the staff are committed to accomplishing.

How staff members are treated has a great deal to do with that. Three principles can be your beacons as you manage library employees and staff recruitment. In many respects these principles sum up the legal and policy concerns outlined in previous sections.

6.1. The Golden Rule

The first guiding principle is one understood the world over. It works just as well in managing library staff as it does in any other aspect of life and it is a very useful guide for your actions and your decision-making in staff recruitment. Try to put yourself in the other person's place and think about what impressions you would have. How would you want to be treated? Some reflection about how your current employees and job candidates will feel, even about the smallest details of your recruitment process, will help you steer towards excellence.

6.2. Make It Transparent

The word transparency has developed a new meaning in recent years. A transparent process, action or decision-making sequence is forthright and honest. In an area of managing—staff recruitment—that involves keeping so much confidential, it may seem strange to propose transparency as one of the basic guiding principles. However, in this area that requires you to apply personal judgement to both small details and big decisions, making your decision process as transparent as possible is a good guide to excellence as a manager.

There are several components that contribute to transparency in recruitment:

- Openness
- Fairness
- Accountability
- Documentation

Overall, you are best to share as much information as possible. You should be able to explain your decision processes before you implement them. Make sure new staff-related policies are noted and explained at staff meetings—not just posted as part of the board meeting minutes. If you know in advance that you will be filling a staff vacancy, explain in advance, at least in general terms, the processes that you will use in selection.

Be open to new ways of looking at the work, the job and your own decision-making. Fairness isn't about inflexible application of process rules as much as it is about attentiveness to creative ways to put overarching goals and purposes into practice. Make all of your assessments on the basis of what is best for excellence in library service in the long term.

Accountability means being responsible for your actions and decisions and undertaking both those things in ways that allow others to hold you responsible. It means responding to inquiries promptly and responding without defensiveness, even to complaints. Accountability requires that you document your process fully and file that documentation so that you can find it readily weeks or months later.

Documentation

The staff recruitment function is not one in which you will be able to save trees. Documenting your decisions and your process means that you will keep almost everything you use on file. You should have a file or file folder set of all of the general documents associated with the planning and recruitment process for each vacancy. You might use separate sub-folders for the various stages of a selection process. You should also have separate sub-folders for applicants generally and for each of your short-listed candidates. You cannot discard applications as you rule applicants out in your selection process; everything should be kept on file.

Questions or challenges may be raised during or after a recruitment process and you should always be prepared for them. In fact, watching you carefully create documentation is one reassurance to your candidates that they have no reason for concern about a fair process. Your general process file should include all of the documents that are mentioned in the course of this guide. Your applicant files should include a record of every contact with them; note the date, time and the purpose and initial it. This is one circumstance when you should make no attempt to clean up your notes before filing them. Notes in your handwriting taken at the time of the interaction carry more weight in the case of a dispute because they are in the time and place of the incident. Get in the habit of adding your initials, date and even time as you work.

Documentation of a recruitment process should be kept on file in accordance with your records retention policy. Keep the whole process for at least nine months or a year. When you are ready to discard older files treat them with the same concern for privacy as you would personnel files and make sure they are shredded in some way before disposal.

6.3. Avoid Conflicts of Interest

The third guiding principle is to avoid creating or taking action in situations in which personal interests are in conflict with the best interests of the library.

Conflicts of interest can develop in the course of recruitment and selection. For example, CEO's should not hire the teenage child of a member of the board because it puts that municipal public library board member in conflict of interest under the *Municipal Conflict of Interest Act*. The board member would be unable to vote on important board decisions.

Board members should not put the CEO or other library staff in conflict of interest by, for example, asking for special consideration for anyone involved in a hiring process. CEO's can be in conflict of interest. Although staff members are not covered by the *Municipal Conflict of Interest Act*, board members and board officers, including the CEO, are directors of the board. Legally, all directors owe a fiduciary duty of judgement to the corporation that is the library. This is a duty of common law rather than one imposed under any specific statute but it is just as real.[4]

One of the guidelines to use in developing policies is that they should clarify potential conflict of interest situations *in advance*. Such situations arise easily and that is no one's fault. The problems develop when conflicts of interest are not recognized or acknowledged early enough or action is not taken quickly enough. Then people can become embarrassed and defensive and their ability to make good decisions is compromised.

Policies that avoid potential conflicts of interest take the personal aspects of handling a decision out of the picture. The policy was adopted in advance; it is neutral in the specific instance.

6.4.   Hiring Policies

Policy should be developed that supports the following general principles:

• Fairness.
• Transparency.
• Selection of the best candidate.
• Selection by the CEO and/or the immediate supervisor of the potential hiree.
• Avoidance of real or perceived conflicts of interest.

While you and your library board will determine exactly what needs to be included in your library's policies, they should cover at least the following:

• Authority for hiring (and firing). This may be included in a policy, in the CEO's job description or in a statement of authorities. If it is written down in more that one place the language must be consistent. Some boards keep everything together in a statement of both signing and decision authorities. Some put it in the CEO's job description but treat that document itself as a board policy. In whatever format, it should fully authorize the CEO to act on the board's behalf or clearly set out specific restrictions on that authority. Issues include: authority to revise job descriptions, determination that a vacancy exists and should be filled, authority to advertise a vacancy, authority to select a candidate and make an offer of employment.
• A statement on whether or not there are any restrictions on the employment of family members of current board members.[5]
• A statement on conditions under which a current board member will or will not be considered for an employment vacancy.

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[4] If you encounter situations in which your best judgement on behalf of the library could be compromised or appear to be compromised by personal interests, you should formally declare a conflict and seek direction from your board. Media coverage of conflicts of interest has left the impression with too many people that having a conflict of interest is, in itself, something to apologize for. It is not. The cause for criticism is only when someone has a conflict and fails to declare it. While a CEO cannot simply sit out a vote on one issue, you and your board can find alternate ways to handle conflict situations if you declare them clearly and promptly.
[5] Under the new *Municipal Act 2001*, municipal library boards are required to have a policy on this matter in effect by January 1, 2005.

- A statement on whether or not there are any restrictions on the employment of family members of current members of council.
- A statement on whether or not there are any restrictions on the employment of family members of current employees.[6]

There are other matters that you and your board may want to consider including in your policies. Some issues might be:

- A statement on how long records of the hiring process will be kept. (Ideally this should be part of your library's records retention policy but if that is not complete, establish standard practices for where and for how long documents such as applications and interview notes will be retained.)
- A statement on whether internal candidates will be considered before any external announcement of a vacancy and, if so, for what levels of position.
- A statement on whether length of service will be taken into account in promotions and, if so, how and for what levels of position, including a statement on how service will be calculated especially with regard to part-time staff.
- A statement on who is authorized to provide references to current or past employees.
- A statement that volunteers will not be assigned the work of regular employees.
- A statement of which specific jobs require screening, including but not limited to police checks, and outlining the reasons that such a requirement is "reasonable and *bona fide* in the circumstances" as required by the Ontario *Human Rights Code*. The board should seek legal advice if specific jobs require that such a policy be implemented.[7] A blanket policy for all jobs will not meet the *bona fide* test of the *Code*.

As a general rule, avoid repeating the law in your policy statements. You are better to refer to the statute if necessary. This precludes any discrepancies developing as either the law or the policy is changed. It also makes clear to everyone that the policy applies within a broader legal context.

Highlighted Resources

Ontario. Ministry of Culture and Communications. *Sourcebook for Small Public Libraries: Personnel (Administration 4).* Ottawa: Southern Ontario Library Service, 1991.
Includes advice on the development of policies.

Ontario. Ministry of Culture and Communications. *Sourcebook for Small Public Libraries: Trillium Public Library Policy Manual (Administration 10)*. Ottawa: Southern Ontario Library Service, 1996.
Includes samples of personnel policy statements.

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[6] Under the new *Municipal Act 2001*, municipal library boards are required to have a policy on this matter in effect by January 1, 2005.
[7] See Special Requirements in the Job Descriptions section of this guide for additional background and resources.

7. WORK PRIORITIES—WHAT JOB NEEDS DOING?

One question that a CEO needs to ask constantly as leader of the organization is "What work do we need to do now and in the future to accomplish our purpose and goals?" Only by answering it can the CEO make work assignments, set priorities, predict training and staff development needs, and ensure that tools, equipment and other needed resources are available for staff to do their jobs. Only by answering it can a CEO set performance expectations for individuals. Only by answering it can a CEO accomplish the recruitment function successfully.

Even in smaller public libraries, the work changes over time and there should be constant adjustment. You want to ensure that the workload among staff members is balanced. Even more important you want to cut out operations that are no longer necessary, making room for new ones that can enhance public service.

Having a constant watch on what work needs doing in the future also helps any CEO to distinguish between opportunities and hurdles. Sometimes it may even allow you to turn a barrier into an opportunity.

7.1. Managing the Transition

Whether a vacancy emerges with lots of advance notice or very little, there are several things you need to do quickly. In a small workgroup anyone leaving for any reason is a source of some stress. Other staff members will take their cues from you. If it is appropriate, the very first thing is to offer congratulations or support to your departing co-worker. The golden rule works here too.

The second thing is to stabilize the work schedule, revise assignments and put your contingency plan into effect. You will probably need eight to twelve weeks to select another employee. Plan for that first to ensure that the rest of your staff doesn't feel they are in a crisis situation for all of that time.

Allow for generous amounts of clear time in your own schedule so that your recruitment and selection process doesn't put a new strain on your just-revised work schedule. It is important that you schedule enough time to spend on thinking through and then filling this vacancy. Clear your schedule of any extra projects and revise the timelines on ones you cannot move. Pick a time to do some extended thinking and start by putting the specific vacancy out of your mind.

7.2. Creating Change

Your first decision is about work priorities and it is important that you not treat the vacancy as a problem to be solved as quickly as possible. It isn't a problem but an opportunity and the first "opening" you have as CEO is to rethink the work of your organization in the context of your overall strategy.

An option to be considered first is a total reorganization of work and work assignments. You have much more flexibility to do such a reorganization when one position is vacant than you have at other times. Don't dismiss change too quickly. Even if you cannot accomplish a total reorganization all at one time, you may decide on major change to push for over time. You could use this vacancy as a major first step along that road and create a new position instead of filling the old one. Don't fail to seize the opportunity you have.

One way to think about this is to consider it as if you were building your staff resource from scratch.

- What important work isn't getting enough staff time and attention?
- How can you organize employee work hours to get the most important functions done?
- What competencies would the person doing that under-prioritized work need to have?
- Do they exist currently on your staff or is that the competency set that you should be hiring for?

In smaller staff groups, it is far too easy to fall into the trap of associating specific work tasks with specific staff members. Try to break out of those assumptions and think from scratch. In whatever way you do it, you need to define (or redefine) the job that is the vacancy to be filled. If your library had always had a staff complement equal only to the current number minus one (the vacancy), what would be important enough to convince the board at budget time to increase the budget to add the new staff hours? What would be important enough to make you argue for it? What would the job responsibilities of that position be? You may be able to reassign those responsibilities to a current employee and redefine the vacancy.

These efforts to think through options and priorities before you take any action will lead you to a more certain definition of what the job vacancy actually is. If you are proposing changes that require board approval, schedule that into your timelines and start writing the reports.

7.3.   Job Descriptions

A good job description serves several purposes and a comprehensive set of such job descriptions for the entire library staff is one mark of a well-managed organization.

A job description fulfills the following related but distinct functions:

- Orientation for a new employee to his or her job and its place in the overall organization.
- Description of a job that is being posted and/or advertised so that potential applicants can judge their personal "fit" for the job and decide whether or not to apply.
- Information for other employees of the library about how a variety of job duties and service responsibilities fit together.
- A starting point for performance planning and management.
- A base document for job comparisons and for evaluations for purposes such as internal pay equity and market equity as well as legal requirements for pay equity in municipal libraries.
- A checklist of work that needs to be covered in the event of an employee's unexpected and extended illness or leave of absence.

- Information for members of the library board about the assignment of work and responsibility in the library organization.

Board Sense
Job descriptions should be the full responsibility of library managers; both policy and practice should reflect that. They do, however, contain useful background information for board members and a CEO may well want to distribute a full set of job descriptions for information only.

Job descriptions are most useful and most used when they are living documents, easily changed and frequently updated. They should be re-examined at least annually at the performance review of the person doing the job. For this reason, we recommend that the authority to create and change job descriptions should be entirely within the purview of the library's CEO.

Job descriptions are management documents, not policy documents. They should not be appended or otherwise part of any umbrella policy of the library board. It simply becomes too easy to postpone making a minor change in the "official" job description because the board meeting agenda is full. Board approval for new or changed positions can be handled by report, by approval of a revised organization chart or by approval of a revised staff complement list.

7.4. Job Description Contents

Whether you are updating all of the job descriptions at your library or revising only one for your employment vacancy, there are some common elements. You should try to keep all of your library's job descriptions in a similar format.[8] It is worth the time to develop a template and use it consistently. Formats vary among organizations, however, and you can design your own template. Consider samples from other libraries or from your municipality and use what works for you. Following is a list of job description components with notes of things you might consider. Remember that you are preparing these documents for both an internal audience (current employees, etc.) and an external audience (job applicants).

Job Title: Try to use titles that are descriptive but not unwieldy. Some libraries use the name of a job classification as the job title as in "Library Clerk 2" and some use specific job titles for various jobs that are all in one classification as in "Overdues Clerk".

Classification or Grade: This should exactly match the categories in your pay schedule.

Qualifications: Outline the educational/knowledge and experience prerequisites for the job. This needn't be as detailed as in the job performance attributes document you are going to create for each vacancy but it should include the essentials. Education, relevant work experience, credentials, and certification all fit in this section. Make sure that your qualification requirements are truly job related and not just customary for this position in your organization. Raise the bar if that is needed in your situation but be realistic in setting requirements. There are some things that can be learned quickly on the job. This is no place for wishful thinking; you have to be prepared to pay wages appropriate to the value of the requirements you set.

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[8] The job description for the CEO may be an exception in format.

The other caution on qualifications is that you can inadvertently become discriminatory. For example, the EXCEL certificate is offered only in Ontario and making it a prerequisite would shut out people who have not lived in Ontario for the past decade. You would be better to state: "EXCEL certificate or demonstrated equivalent knowledge and experience." Allowing for equivalencies acknowledges that people can have a wide variety of experience. You need not ignore the requirement you set, but stating an allowance for alternatives ensures that you and the candidate get a chance to consider the prerequisite and determine the appropriateness of alternatives.

Wage Rate: The current salary or wage rate should be on the job descriptions. Job applicants who are looking for significantly more money than your library offers can withdraw from the competition early. There is no sense wasting their time or yours in taking the process further. For internal consistency, you should consider using both an annual salary range (for full-time jobs) and an hourly rate.

> **Know How**
> If you have both full-time and part-time employees doing the same job, use the same job description and distinguish the specific position in postings. Employees with the same job description should also share common performance standards and training opportunities. Persistent differences in the way you treat full-time and part-time employees, particularly those doing the same work, can contribute to poor staff morale.

Hours of Work: Public libraries rely heavily on part-time employees. For some libraries, the hours of work are particular to the job and should be shown on the job description. In others, work hours vary among several employees holding that job; for example, three circulation clerks who work 16, 20 and 28 hours per week. In this case the job description may not include work hours but that information *must* be on all posting and advertisements. You should distinguish between full-time and part-time job positions very clearly, not only in the job descriptions but in all other job-specific documents.

Schedule of Work: Incredible as it seems, people outside libraries often assume office hours when they apply for work. State your expectations for evening and weekend work on the job description, either in general terms or average terms. Stating "Average of two Saturdays in four" limits your scheduling less than "Every second Saturday". Use language that is consistent with your personnel policies.

Job Summary: Many job descriptions have a one or two sentence summary of the position. It isn't necessary to include one but preparing it with a posting application in mind keeps all of your revision work together and means that you have a head-start when you have to write a job posting or advertisement for a vacancy.

Duties and Responsibilities: Write these with enough specific detail that someone reading the document knows what the person in the job spends time on but don't stray into procedures. Ensure that any supervisory or training responsibilities are clearly stated. "Duties" suggests tasks or functions but "responsibilities" will remind you to include more general job requirements. For example, item seven in the Clarington Public Library job description in Appendix A requires each employee to work in support of the library's mission and goals. That brings strategic alignment into each and every job and puts it into each individual's performance appraisal discussion as well.

Reporting Relationships: Name the supervisor for the job position with a job title. This is the person to whom the employee in the job is accountable for performance and is also the person who will do the performance monitoring and appraisal.

Working Conditions: This may not be a separate section heading on your job descriptions but you should find a way to clarify relevant information on each job description. Don't leave out the physical handling aspects of functions such as unpacking courier boxes. Some possibilities are:

- Work location if there is more than one and/or an expectation that the worker may be scheduled to multiple work locations on different days.
- Physical demands of the work.
- Travel or transportation requirements.
- Health and safety considerations unique to the job.

Special Requirements for Employment in the Job: Highlight any specific prerequisites for working in the position, including screening. These must be relevant to the specific job. You cannot set blanket requirements for everyone. However, consider the risks to the library involved in a job's functions. One concern is employees who have access to vulnerable persons on their own in the course of regular work. Libraries have very few such jobs but areas to watch are delivery of library materials to the frail elderly in their homes or children's programming in which library staff are alone with children in private areas of a facility. You have a legal "duty of care" under common law and you may decide to screen employees doing such work. The Ontario Screening Initiative sets out a multi-step process developed to support organizations that must screen volunteers and the web site has useful information about the decision and the steps involved: http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php?display=4,0# .

Special requirements for employment could include:

- Proof that the candidate holds a required license or certification;
- Satisfactory reports through screening, such as a police or credit check.

Date Revised: This is such a little thing but it is often overlooked. Make sure the date of approval or last revision is entered from the keyboard, not a field supplied by your word processing software. You don't want this date to change arbitrarily every time to print a copy of the document.

7.5. Create a Job Description for the Vacancy You Have Defined

In the first step above, you considered reorganizing work and job assignments to determine the best overall distribution. That probably left you with a clear idea of what work needs to be done in the job you are going to hire someone to fill. Describe your conclusions in a job description, either a brand new one or a revised version of one currently in effect. Draft it and then review all of the job descriptions that will interact with that new job. Do they cover everything? Now review it in relation to other jobs at similar pay levels. Are they consistent? Take time now to consult with other staff and revise as necessary. This job description is the first document in your recruitment selection process.

Highlighted Resources

Appendix A-C. Job Description Examples from the Clarington Public Library, Haldimand County Public Library and Pelham Public Library.
Three examples to draw ideas from.

Ontario. Ministry of Culture and Communications. *Sourcebook for Small Public Libraries: Personnel (Administration 4).* Ottawa: Southern Ontario Library Service, 1991.
Describes basic job description contents and provides two sample position descriptions

For Further Reading

Defoe, Deborah. CEO, Kingston-Frontenac Public Library. *Core Competencies: A Tool Kit for Libraries.* Slides of a presentation given at the Ontario Library Association Conference, Toronto. January 30, 2003. <http://www.kfpl.library.on.ca/kfpl/DDefoe_OLA-2003.pdf>
A presentation of interesting work on using competencies (see section below) to produce a new set of job descriptions after municipal amalgamation required a merging of unions.

Ontario Screening Initiative. Volunteer Canada.
<http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php?display=4,0#>
The resources on this web site are for organizations recruiting volunteers but most apply equally well in the hiring of employees.

8.   PERFORMANCE ATTRIBUTES—WHO CAN DO THE JOB?

Performance attributes are the essential knowledge, the skills, know-how and/or capabilities and behaviours of those persons who could do the job in question well. While a job description outlines the work of the job, a performance attribute list describes the performance capabilities for a person doing the job. Such a list can also be called a job specification. It specifies the requirements for someone filling the job.

8.1.   Getting from A to B—Job Descriptions to Selection Criteria

Now that you have an up-to-date job description, you are ready to establish the job performance attributes. There are a number of ways to think this through. Your overall purpose is to come up with a second document that lists the qualities and characteristics and typical behaviours of someone who does the job in question well. Your perspective changes from describing the job to describing the person performing the job.

This is the crucial stage in recruiting to fill a vacancy and it is the stage most often given short shrift on the excuse of lack of time. You don't have time for a bad hire. Don't make the mistake of rushing past this phase. If you can describe the qualities of a person doing the job well, you've created your selection criteria and those criteria are the basis for everything else in the selection process.

First we'll cover some of the variations of emphasis and process that can be used: job analysis, KSAO's and job competencies. Each of these results in descriptions of job performance attributes.

Job Analysis

This approach concentrates on the job tasks. It involves close observation of work in performance, function by function. Analyzing each piece of the job, you would ask questions such as: "What skills does the job performer use to accomplish this task?" "What is the performance standard expected for this task?" One by one you build up a set of job performance attributes. Job analysis applies well to transaction–based work that doesn't change significantly from day to day or week to week. It is also easier to apply to work that involves external actions and/or results than to work that primarily involves thinking and judgement. Job analysis is a relatively detailed, job-specific approach.

KSAO's

Librarians aren't the only ones who use jargon and acronyms. KSAO is a short-form used by human resource professionals that stands for knowledge, skills, abilities and other characteristics such as values. These are the four aspects for description of job performers. In using the KSAO approach, you would look particularly for ways to describe those who perform a job with excellence as opposed to those who perform it only adequately.

One definition expands the four aspects as follows:

> *"Knowledge* refers to a body of information that an employee must know to be an effective performer. …
>
> *Skill* refers to proficiency at a specific task and is a function of both underlying knowledge or ability and practice. …
>
> *Abilities* are attributes that indicate the potential to do a job, given subsequent training or experience. …
>
> *Other characteristics* is a catchall that includes any critical attributes that are not readily categorized [above]. Examples might include required licenses, … tools, or the ability to be bonded and insured. … integrity, attendance, … as well as relevant personality characteristics."[9]

The KSAO approach would work well for those of you who want to break the work in this phase into smaller pieces and take it one step at a time. It is an approach that is widely used among human resource departments in larger organizations and it works for a wide variety of jobs.

Job Competencies

This approach emphasizes the competences or competencies that are characteristic of a high performing person in the job. The overall emphasis is on the behaviours and practices applied to doing the job well. Human resource professionals talk of building competency models or profiles, usually for related jobs at a certain level in an organization rather than for one specific job individually. This approach allows for consideration of personality and values as part of the behaviour applied to job performance.

Job competencies aren't easily defined and there is no overall agreement within the community of human resource professionals on a good definition.[10] Some attempts at definition are circular and most definitions refer to the KSAO elements of the previous approach. For example, "A competency is a knowledge, skill, ability or characteristic associated with high performance on a job, such as problem solving, analytical thinking, or leadership."[11]

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[9] Rosse, Joseph and Robert Levin. *High-Impact Hiring*. San Francisco: Jossey-Bass, 1997., p. 34-5.

[10] Shippman, Jeffery S. et al. "The Practice of Competency Modeling". *Personnel Psychology*, Autumn 2000 Vol. 53(3): pp. 703-740. This article reports results of a two-year task force comparing professional practice of job analysis and competency modeling. It is clear from the task force's work that the professionals too have difficulty defining terms and understanding where the rapid adoption of competency profiles will lead human resource departments.

[11] Schwind, Hermann F., Hari Das and Terry H. Wagar. *Canadian Human Resource Management: A Strategic Approach*. 5th ed. Toronto, McGraw-Hill Ryerson, 1999., p. 70.

The job competency approach is currently "hot" in the popular business literature and business managers have adopted and pushed it. Identifying competencies works particularly well for management jobs and for jobs in which the work is knowledge or thinking work, non-routine work and/or work that involves considerable interaction with others in a team or on a project. Since such work is more and more prevalent in our economy, use of the job competency approach is growing. Another advantage of this approach is that the effort can be dual-purpose. Identifying competencies of high-performers not only results in selection criteria for new employees but also provides a staff training and development checklist[12]. If we know what practices a good employee habitually uses, we can teach everyone to use those behaviours. You get a double payoff for your work.

The job competency approach is relatively general and competencies tend to be described in very abstract terms. The danger is in being so "high-level" that the description is meaningless in application to selection. Competency sets may seem very similar for a variety of specific jobs. It does work well, however, for jobs that require considerable interdependence with other employees and that certainly applies to the teams in smaller public libraries.

Core Competencies

Usually the term "competencies" is used in relation to a particular job or job category and refers to behavioural characteristics of a person who can do that job well. Increasingly, you will also come across the term "core competencies". The original use of this term meant the collective and unique capabilities of a whole organization. For example, Sony as a company has a core competency in miniaturization. More recently, however, the term is used for a different variety of job competency. It refers to those job competencies that every worker in an organization or company must have in order for the group to perform well. Competencies shared by all employees are called "core" to the organization. This usage has particular spin-offs for use in employee training as well as in recruitment and performance measurement.

8.2.   It's Your Choice

The approaches outlined above all lead to creation of a set of performance attributes for a job. The good news is that you don't have to choose just one.

In large corporations, there is great concern that selection criteria be described and used consistently—in ways that can be replicated over time or across work locations in multiple cities. There is also concern about defining terms carefully for accurate communication because the recruiter in the HR department may have little first-hand knowledge of the specific job and the supervising manager may never see the job applications. For you, however, "small is beautiful". As CEO, you are wearing all of the hats. You have first-hand knowledge of all of the work and the whole team.

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[12] Competencies or performance attributes are also used in providing consistent feedback about employee performance. See Beth Cada's *Coaching for Service and Success: A Guide to Performance Feedback.* Ottawa: Southern Ontario Library Service, 2003.

That reality means that you can pick what you like among the approaches. Lean towards one for some jobs and another for other positions or mix and match as you learn what works for you and your library. The point is that you find your own way to describe the characteristics of a person who can do the job well. To keep it neutral among approaches, we have chosen to use the general term "performance attributes" in this guide rather than the term "competency". You can choose whichever one you like better in practice.

For Further Reading

Association for Library Service to Children. "Competencies for Librarians Serving Children in Public Libraries." *Journal of Youth Services in Libraries* 14.2 (Winter 2001): 21-24. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through the Ontario Library Association web site: <http://www.accessola.org/members/>
This statement of competencies was first developed by ALSC, a division of the American Library Association, in the 1980s. It was last revised in 1999. Useful in describing the work involved in serving children.

Cada, Beth. *Coaching for Service and Success: A Guide to Performance Feedback*. Ottawa: Southern Ontario Library Service, 2003.
Describing good performance is an important aspect of providing feedback. This title is also part of The Library Development Guide Series.

McLagen, Pat. "Competency Models" reprinted as "Great Ideas Revisited." *Training & Development* 50.1 (January 1996): 60-65. *Business Source Elite*, Ebscohost.
A condensed version of one of the first articles on job competencies. Originally published in 1980.

Naylor, Richard J. "Core Competencies: What They Are and How to Use Them." *Public Libraries* 39.2 (March/April 2000): 108-114. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through the Ontario Library Association web site: <http://www.accessola.org/members/>
Core competency analysis as part of management strategy in larger libraries.

Reference and User Services Association. "Professional Competencies for Reference and User Services Librarians." 2003.
<http://www.ala.org/Content/NavigationMenu/RUSA/Professional_Tools4/Reference_Guidelines /Professional_Competencies_for_Reference_and_User_Services_Librarians.htm>
A statement of competencies approved by RUSA, a division of the American Library Association.

Rowe, Christopher. "Clarifying the Use of Competence and Competency Models in Recruitment, Assessment and Staff Development." *Industrial & Commercial Training* 27.11 (1995): 12-17. *Business Source Elite*, Ebscohost.
A scholarly article that brings order to the development and increasing use of new concepts.

8.3. Team "Fit"

In determining performance attributes for your process you are looking at characteristics of the individual worker. You may be wondering if it is permissible to consider how an individual would "fit" into your library and its work team. The short answer is "Yes!" You should give consideration to adding a new team member who can bring new strengths to the group and to your library. You should use a vacancy as an opportunity to fill in gaps in the skill set of the team as a whole. It is also important that the candidate you select respects the values of your organization and its culture. The only caution is that you must deal with this as a performance attribute and be vigilant in not turning it into a personal preference.

People are different. They have different ways of interacting with the world and with each other. That difference or diversity is a strength for humankind overall, for communities, groups and, most emphatically, it is a strength for work teams. There is extensive research that shows that teams made up of members with diverse experience, opinions and approaches are more successful than teams without such diversity.

You need to look out for someone who can add something to your staff, perhaps even shake things up a bit. There are dangers when considering fit, however. One trap is to be drawn to an applicant who seems most like the great co-worker who recently left your staff. Be careful; that employee was one of a kind—never to be replaced exactly. Attempting to do so is unfair to your applicants and is bound to be a failure at some level.

The second trap is to mistake someone who is like you for someone who is a good fit for the team. An affinity with others whom we immediately recognize as sharing our values or our thinking patterns is natural but guard against letting it become the basis of your selection decision-making. Here is one good reason to do interviews with a partner. Know yourself well enough to recognize your preferred ways of doing things as preferences and nothing more.

Create performance attributes that speak to your need to take the development of the team into account but don't allow them to be an overriding part of your selection decision-making.

For Further Reading

Sutton, Robert I. "Why Innovation Happens when Happy People Fight." *Ivey Business Journal* (November/December 2002) <http://www.iveybusinessjournal.com/topics.asp?intTopic_ID=8> *A discussion of why companies should build "creative abrasion" into their team development.*

Webb, Barbara "Type-Casting: Life with Myers-Briggs." *Library Journal* 115.11 (June 15, 1990): 32-37. *ERIC*, Ebscohost. *A basic article on the well-known personality type system. It includes a short list of additional readings. Use MBTI to get to know yourself—how you manage and how you interact with others. Only certified MBTI trainers should test others and MBTI should never be used as a selection criterion for a job.*

8.4. Describing Performance Attributes

Your next step is to use whichever thinking approach works for you and to describe performance attributes for the job you have defined. If you are working with someone else on this process[13], you definitely want to involve them in this work.

First take each item in the job description and turn the qualification, task or responsibility into a statement of what is needed in the person doing the task or having the responsibility.

The following table gives some examples for several library jobs. These are intended as illustrations only and the table includes just one or two sample tasks for each position.

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[13] See section below on Section Process Planning.

Job Task and Performance Attribute Examples

Job Task	Performance Attribute
Information Services Assistant	
• Assist the public in finding specific resource materials or resource materials that answer inquiries	• Listening skills • Advanced database and/or Internet searching skills
Children's Services Assistant	
• Plan and deliver story-hour programmes including songs, rhymes and finger-plays	• Able to "connect" with young children • Performance skills as a reader and song leader
Circulation Assistant	
• Check library materials out to borrowers in accordance with established rules and procedures	• Able to follow detailed procedures • Able to enter transaction data through a computer interface • Able to make neutral "small talk" conversation with ease.
• Handle cash	• Able to count currency and make change accurately
Page	
• Maintain the organized arrangement of collection materials, performing such tasks as shelving, reading shelves, and keeping storage areas in an orderly state	• Able to follow detailed procedures with consistency and accuracy
Branch Head or Assistant Librarian	
• Train and supervise public service (or branch) staff and evaluate their work performance	• Able to motivate others to accomplish service objectives • Excellent communication and teaching skills
• Develop library collections to meet community needs	• Broad reading tastes and habits • Excellent general knowledge and awareness of current events • Values intellectual freedom

You might want to put each performance attribute on a separate small sheet of paper to make things easier at a later step. Some job description items will prompt you to think of several attributes—some none at all. Work through all of the items in the job description.

Next, back off the work tasks and think about how the job inter-relates with other job functions in your library. That is an aspect of work, especially in a small group, which may not show up well in a job description. Write down any performance attributes required in each of the inter-relationships. Here is the place to consider the work team context as well.

Finally, use the critical incident technique.[14] Reflect on the work and think of specific situations in which the person in the job has been or could be the pivotal staff member—the one who makes a difference. You will probably recall service or process snags and complaints but make sure that you also look at positive incidents—effusive thanks from a customer or a particularly well-delivered programme. For each critical incident, reflect on the behaviour of the person in the job. What in that behaviour made or could have made the difference between how a stand-out employee performed as opposed to one who just got through it. Rephrase all of your conclusions as positive behaviours and write those performance attributes down.

Now that you've done the task in three different ways, you can be confident that you've included everything of importance. You probably have too many performance attributes to use as selection criteria. Lay out the slips of paper and move them around or get out your coloured markers. Look for similarities and overlaps among your attributes. Group them and then try to rewrite the group in more general words as a single attribute. See if you can get your list down to about a dozen attributes but don't over-generalize and lose track of any that you think are particularly important.

Know How
You should keep your results on file, of course, but think of them more as useful for recycling rather than simple reuse. It is very important that you think through this step each time and develop the factors important for this job at this time in your library's development.

Transfer your work to a new document and ask for comments from others who know the situation. Edit to incorporate useful feedback and put your performance attributes in priority order or at least in priority groups.

Congratulations! You now have selection criteria for your job vacancy. More than that, with the thinking you have applied to this process so far, you know a lot about what to look for on a résumé, what to listen for in an interview and what to ask when you check candidate references.

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[14] Keep this technique in mind for your work on job descriptions, performance monitoring and staff development as well.

Highlighted Resources

Appendix A. Job Description Example from the Clarington Public Library and Appendix D Job Posting Example from the Halifax Regional Library.
Look at these examples to see how the use of competencies is moving into practice in libraries.

Gendron, Celine. "Competency Profile of Information Management Specialists in Archives, Libraries and Records Management: A Comprehensive Cross-Sectoral Competency Analysis." ALARM (Alliance of Libraries, Archives and Records Management), [1999].
<http://www.cla.ca/resources/competency.htm>
Work on human resources development and particularly training issues common to the three related work sectors led to this profile of competencies common to the professions.

Saskatchewan. Public Service Commission. *Competency Model and Profiles.*
<http://www.gov.sk.ca/psc/corecomp/default.htm>
Access to competency profiles for all jobs with the Saskatchewan provincial government. You can use these to prompt ideas for your own jobs.

For Further Reading

Tennant, Roy "The Most Important Management Decision: Hiring Staff for the New Millennium."
Library Journal 123 (February 15, 1998): 102. *Library Literature & Information Science Full Text.*
H.W. Wilson. Available through the Ontario Library Association web site:
<http://www.accessola.org/members/>
Thoughts on the skills needed in libraries to meet the challenges of the future.

9.   SELECTION PROCESS PLANNING

Once you are sure about the job vacancy that you want to fill, the next stage is to consider your overall process for choosing someone to do the job. You will be designing selection criteria filters and involving others as appropriate.

Give some consideration to how you will handle expenditures involved in the selection process including the budget lines to be charged. Costs may be incurred for advertising, long distance telephone calls with candidates and references and/or travel expenses for candidates coming a considerable distance to an interview.

Your selection process will be affected in its specifics by your overall hiring policies and by the particular job you are hiring for. The most important point is that you must determine your overall selection process for a job vacancy *before* you start that process. You should never be determining selection criteria after you have started to receive contacts and applications from possible job candidates. Human nature being what it is, you don't want to give yourself any chance of being influenced in determining what you need in the person you hire for the job by what you see in the first few applications that arrive at your desk. This is yet another way in which your process must support the principle of transparency and lack of bias.

9.1.   Don't Go It Alone

Generally, it is best to have more than one person involved in the selection process and especially with the interviewing. Having two active listeners with different perspectives in that situation is a great advantage. One guideline is to involve the person who will supervise the new appointee and also that person's supervisor. In smaller libraries that means that the CEO is almost always involved in the selection decision but it also means that you may not have any other supervisor for most jobs.

Someone on your staff who is at a peer level to the position you are selecting for may make a good selection process partner. Consider also whether or not it would be appropriate to involve someone from outside the organization. It could be a manager from a nearby library of small or medium size; it could be a SOLS consultant.

Regardless of whether it is an internal supervisor or an external colleague, be clear when you make the invitation what his or her role is in the process and particularly in the decision-making. Since you are accountable to the board for staff selection, it is probably best to reserve the final decision responsibility to yourself when working with external assistance. That said, we still encourage you to seek diversity of input in the process. You will be glad to have someone to compare reactions and conclusions with.

Board Sense
We do not recommend that you use any member of the library board as your selection process partner. They are committed people and may be willing but it introduces an awkwardness that complicates the process. Particularly at the interview stage, your candidates will be trying to "read" you for clues about the work culture. Your deference to a board member would puzzle them. Besides, boards should not micro-manage and hiring staff is a management responsibility. Boards should set the strategic direction; it is up to you to align staff work with it. However, it is possible for boards to have input into the staff recruitment process as you refine the job description and define specific performance attributes. In fact, you should seek their input on these steps for the job position in your library that has responsibility for most of the CEO duties in your absence.

Once you have an idea of who might be working with you on the selection, you will also have a sense of whether that collaboration will be only for the candidate interviews or for other parts of the process as well. Consider scheduling difficulties and time constraints for external colleagues and be conservative. You don't want the collaboration to introduce delays into your process.

On the other hand, if you have an appropriate partner internally, involve them in as much of the process as possible. The selection process is a learning experience for those involved every single time but particularly the first time. Exposing members of your staff to it gives them a much better idea of how their own work and continuing learning fits into the bigger picture of your library's development. Being part of a careful selection process is a mini-course in strategic alignment.

9.2. Outline a Process

Now that you have identified performance attributes for the job, plan a process of screening to assess job candidates for those traits. Your goal is to sort the set of applications you receive, analyze them and filter the applicants down to a final selection. Your process will really consist of applying a series of progressively finer and finer filters until you have a selection. The number of filtering steps depends on the number of candidates, your time resources, and your job-related requirements. You are trying to find the best match available to you.

In planning the overall selection process, you need to know something about the potential components and have an overview of process options. You may find it best to read this guide through and then come back again to this section. The planning step comes first but you need to know where you are heading to evaluate options for your plan.

Various stages of a selection process can be used to assess different attributes. Your plan should ensure that you test for your highest priority attributes in more than one way as an assurance check. Some attributes don't lend themselves to assessment in some of the selection process stages. As an over-simplified example to illustrate this, let's assume that honesty and care in handling cash is one of the performance attributes for a job. Most selection process stages gather information directly from the candidate and a dishonest person will claim honesty. The way to test for this attribute is to ask a third person who has observed past behaviour. In the selection process, that kind of information gathering is reference checking.

Large companies that hire scores of new employees each month can justify the cost of selection/screening steps that will never be realistic for public libraries. Your selection processes may include:

- Job application forms
- Résumés and letters of application
- Telephone interviews
- Interviews
- Testing
- Reference checking

Given that, you can develop your selection process plan as a table. The column headings are the process stages and the row headings are your performance attributes for the job.

List your attributes in priority order or mark the high priority ones in some way. Your plan *must* test for these. In fact, you may be able to determine that one or two performance attributes are essential or mandatory. Mark those on your list as well. Start to fill in the cells of the table to indicate what stage you expect to use to assess which attributes. Plan to use only the stages you need. Almost all processes will use either application forms or résumés (but probably not both), interviews and reference checking. Some processes will use both application forms and résumés; some may use testing or performance demonstrations. Telephone interviews are awkward and should be used only for targeted information gathering or for preliminary contact if there would be significant travel costs for an in-person interview.

Consider which stages will test most efficiently in terms of your time and resources, and most effectively in terms of your confidence level in the results. Job interviews are constrained by time. Save them for assessment of judgement and behaviour. Don't waste valuable interview time on gathering relatively straightforward information on education and relevant experience.

The following table is an example but with only a limited number of performance attributes. It is not intended to be a complete outline for any particular job.

Performance Attribute Table[15]

	Performance Attributes	Application &/or Résumé	Interview	Testing	References
★★	**Knowledge** of information resources & reference tools	Х			
	Knowledge of fiction genres	Х			
★	**Skill** in reference interviewing		Х		Х
	Skill in database/Internet searching techniques			Х	
★	**Ability** to serve customers as unique individuals		Х		
	Ability to use standard office software for workgroup applications	Х			
	Value - Integrity		Х		Х

Create your process plan by filling in the table and balancing your effort across all of the selection process stages you plan to use. This paper and pencil thinking exercise becomes the navigational chart for your selection process. It is a plan that can be adjusted as you move through the process and learn more about the decisions facing you but it is well worth the time spent. This simple table gives you confidence throughout the process that you are working effectively and that you will have gathered the information you need for your decision by the end of the process.

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[15] Rosse, Joseph and Robert Levin. *High-Impact Hiring: A Comprehensive Guide to Performance-Based Hiring*. San Francisco, Jossey-Bass, 1997. p. 106-112. Adapted from their performance attributes matrix.

9.3.   Plan a Scoring System

Assigning scores to people may be something that makes us uncomfortable but there is no getting around the fact that recruitment involves judging job applicants. It is much better to deal with that head-on than to avoid it and end up with no way to explain your selection decision (and no documentation of your decision-making). The other reason to score is simply that it is much easier to circle a number in the middle of the scoring range than it is to write down your judgement that the answer was a mediocre one. You will be taking extensive notes; give yourself a break on the scoring.

How you score is not as important as you might think. You will see some examples with the interview question samples in Appendix D-E. If some other method works better for you, feel free to try it. The first caution is that you be absolutely scrupulous in using exactly the same scoring system for every candidate at each phase of the selection process.

> **Know How**
> This ranking method avoids the necessity for you and your interview partner to work at consistent scoring between you. It doesn't matter if you score an interview answer as five and they mark it four if that is a high score for each of you on that question. Your essential agreement will show up in the rank orders.

The second caution is that you should not add raw score totals together for various phases of the selection process. Instead, convert the scores into rankings and compare those across phases for an overall picture. One way is to number rank candidates as in first, second, third. Another way is to categorize them in relation to the performance attributes as in 'not demonstrated', "demonstrated", and "demonstrated superlatively".

Enter the rankings on a table similar to the example below and then you can simply count the number of "firsts" or "superlatives" to find your top candidate over all phases of the selection process. If you have a tie among two or three, go back to the detail level for your highest priority performance attributes and make that your tie-breaker.

Selection Process Scoring Table

	Performance Attributes	**Ranking of Candidates**				
		A	**B**	**C**	**D**	**E**
★★	**Knowledge** – Reference tools	*2nd*	*1st*	*1st*	*3rd*	*4th*
	Knowledge – Genre fiction	*1st*	*2nd*	*3rd*	*1st*	*2nd*
★	**Skill** – Reference interview	*2nd*	*4th*	*1st*	*3rd*	*3rd*
	Skill – Search techniques	*2nd*	*4th*	*1st*	*3rd*	*4th*
★	**Ability** – Customer service	*2nd*	*1st*	*1st*	*2nd*	*3rd*
	Ability – Use of software	*2nd*	*1st*	*2nd*	*3rd*	*3rd*
	Value - Integrity	*3rd*	*2nd*	*1st*	*2nd*	*3rd*
	Total of First Place Rankings	*1*	*3*	*5*	*1*	*0*

Some selectors weight scores for highest priority performance attributes in order to ensure they are well considered in the outcome. You can do that or accomplish the same thing by checking back at the detail level to ensure that your top candidate(s) shine in the high-priority attributes—not everywhere else but there. Overall, try to keep your scoring system simple.

10. ANNOUNCING THE VACANCY AND INVITING APPLICANTS

Once you have a job vacancy clearly defined and have considered your overall selection plan, you are ready to open the process up to others and announce the vacancy. Your objective is to cast your net widely—to reach a broad range of potential applicants.

10.1. Posting and Internal Applicants

Your library's policies on hiring may include requirements that internal applicants be treated somewhat differently in your process than external ones. The two most significant variations are discussed below. It is important, however, that you not apply any such special treatment unless specific board decisions authorize it. Such policies may be part of the library's personnel policy compilation.

10.2. Applications in Advance of Others

Sometimes a vacancy is posted first for internal (current employee) applicants only. This may be true in both unionized and non-unionized situations. Advance posting may be only a courtesy before an outside advertisement. Alternatively, policy may require that internal applicants be reviewed first with an external search not proceeding until all internal candidates have been evaluated and rejected completely.

The courtesy of knowing about a vacancy first is more than reasonable. No one wants to hear news of his or her own workplace in the newspaper or from neighbours. You should certainly adopt this practice.

Advance consideration is more problematic in small work groups. A requirement to reject internal applicants before posting outside the group means that both you and the candidate are in an awkward situation. You must assess performance attributes without having other candidates to compare with. If you have any doubts at all about the performance of the internal candidate in the new job assignment, the only way to get a comparison is to eliminate your internal candidate from consideration. Deciding to "go outside" rather than promote a current staff member is a hard message to deliver in a small, close work group. If you make that decision when necessary, it can have far-reaching consequences. If you avoid making it, there are also serious consequences.

You have an obligation to your community to select the person who has the required job performance attributes and the best way to do that is to compare among several candidates in a job competition. Small libraries should be both careful and innovative in the policies they adopt on special treatment for internal candidates. External posting might be mandated for vacancies where there are fewer than two or three internal candidates or for all vacancies above a specified job classification level. You shouldn't fill job vacancies, time after time, without any opportunity for job competition.

If current employee applicants are keeping up with training and care about excellent library service, they already have an inside track for job vacancies. Job competitions are both an opportunity and an incentive for everyone to learn and grow at work.

10.3. Consideration of Past Service

Internal candidates often have special treatment in consideration of past service, often termed seniority. Seniority is a major factor for unionized workplaces in which the industrial model of every employee doing exactly the same work is the historical background. There is no legal requirement to consider seniority but it is usually included in union agreements and may be included in personnel policies in non-unionized libraries. Seniority is seldom a determining factor in evaluating candidates, no matter what kind of personnel policy is in place.

Seniority should be considered only as a tie-breaker when the evaluation of qualifications and job performance attributes gives no reason for choice between two candidates. In the absence of such a close competition between candidates, seniority is not even considered. If your board wants to include consideration of seniority in its hiring policies, remember that you will have to specify the exact method for calculating past service and how it applies among full-time and part-time staff.

10.4. Postings and Advertisements

These two documents, postings and advertisements, take a different form but their essential purpose is the same—to announce the job vacancy and invite candidates to apply. You should announce your job opening as widely as you possibly can and use a variety of methods to publicize it. Make sure that your job vacancy announcements are very clear about how to apply, to whom to apply and what the final submission date is. Provide a specific e-mail address at which applications can be received confidentially or specify that none will be received by e-mail. Either way, you must be clear.

Postings tend to be used in places in which you handle the publication and distribution yourself. Since you have control you can include full information about the job including either a copy of the job description or at least extensive excerpts from it. Options for postings include internal bulletin boards (including all branch locations), community bulletin boards and public web sites. It may be appropriate to e-mail a posting to other libraries in your area or, if the etiquette of the list allows, to post a message to electronic discussion lists.

Organizational web sites provide job listing services to their members and will post your notice for a relatively low fee. You may have to create a shorter version of your posting. For jobs that require some library knowledge and/or experience, you can use the Ontario Library Association Job Hot Site: http://www.accessola.com/career/main.html. For positions at the librarian level, you can also use the University of Toronto, Faculty of Information Studies and the University of Western Ontario, Faculty of Information & Media Studies. You will find links to both from the SOLS web site and the OLA job site. Finally, don't forget the local office of Human Resources Development Canada.

Advertisements differ from postings in that you are probably paying for publication and space is severely limited. You will have to write an ad that covers the essentials only. Adjust your draft advertisement to match the format used in the publication(s), such as community newspapers, that you intend to use. If possible, ask two or more people to read your draft ad and comment on it. This is one time that you can be too close to the process and unable to see whether your compacted words are complete and effective.

10.5. Applications on File

One of the policy/practice questions that a library must decide upon is whether or not it will accept applications for employment generally (not just for specific vacancies) and keep them on file. There are advantages and disadvantages. If you accept letters of application, you must acknowledge them, treat them as confidential personal information, and maintain the files for a pre-determined time limit. Then, when you have a vacancy, you must include all of them in some process that you can document. Any pre-selection of file applications would leave you open to complaints under the Ontario *Human Rights Code*. One option is to consider all of them as applicants for every vacancy that arises over the promised time period and include them in your overall selection documentation. Another option is to contact everyone in your file, inform them of your job vacancy and ask them to confirm in writing that they wish to be considered as an applicant. This choice gives the applicant an opportunity to assess how well he or she matches the specific job duties and qualifications. Either option can be a lot of work but you must be consistent in treating everyone in the same way.

Organizations with web sites are increasingly moving to a practice of not accepting any unsolicited applications for employment and informing those who inquire that all vacancies will be posted on the web page and they should monitor it. You will have to consider your alternatives and what is expected in your community.

Decide on what works best in your situation and stick with it. When a general application and résumé arrive in the mail, send a letter of acknowledgement and explanation of your practice—either filing the résumé or returning it with your letter to the sender.

Highlighted Resources

Appendix D. Job Posting Example from the Halifax Regional Library.
< http://www.halifax.library.ns.ca/jobs/index.html>
This library system includes competencies in all job descriptions and postings. Check the web site to see if there are any current postings in addition to this example.

Ontario Library Association. Job Hot Site. <http://www.accessola.com/career/main.html>

11. EVALUATING CANDIDATES ON PAPER

11.1. Application Forms and Résumés

Your entire selection process involves gathering information about your candidates in order to support the selection decision you will make. The first step applies to all of your applicants and it must be efficient. You will use the sorting screen that has the widest mesh of the set of filters in your process. Application forms and résumés are both ways to collect information from your applicants and both do it in written form. They are so similar that you may decide to use only one of the two.

Application Forms

There is no requirement to use an application form and, especially for small libraries that have job vacancies infrequently, there may be no reason to ask applicants to fill one out. Usually the advantage to a form is that you get to decide the format and order in which information is presented back to you. It makes it easier to compare one applicant with another. In large organizations that handle volumes of applications every week, the advantage has some impact. If you are dealing with small numbers of applicants, you may not need an application form. An alternative option would be to use a traditional application form only for job positions that have relatively high turnover, such as for pages.

Some organizations use a non-traditional application form that is customized for each job vacancy and targets some specific competencies for the job. Some ask applicants to prepare and submit their own "form" consisting of personal identification and contact information and then a table of two columns. The left side lists each item from the job description for the vacancy and, on the right side, applicants explain what they can bring to the job that is relevant to that item. This is a simple but very job specific application form.

If you do decide to use an application form, check several examples including the one from your own governing body. Pick what you like from several. Remember, of course, that you cannot ask for any information not permitted under human rights legislation or not directly relevant to your hiring decision. If you don't see it on other forms used by human resource professionals, there is probably a reason. For example, the application form should not ask for a Social Insurance Number since the numbers can be related to date of birth or length of residence in Canada. You do not need to know a person's SIN to evaluate his or her ability to perform a job. You need know only that they are legally entitled to work in Canada and you should ask only that.

Résumés

Résumés are a well accepted method of gathering written information about job candidates. The major difference is that with résumés, the candidate is free to choose the order and format of information and can also choose what to include (or highlight) and what to leave out (or play down). For library jobs, so many of which are knowledge jobs requiring a high degree of interpersonal communication, the free-form résumé tells you something about the personal approach of each candidate that may be well worth the trouble of flipping back and forth to find particulars.

Know How
The preparation of résumés by a professional service is waning. Not only can most people get access to sophisticated word processing software but the increasing number of large corporations who want résumés submitted in electronic form means that candidates need more control over their document. Another tip for selectors, however, is always to consider both the cover letter and the résumé. If they don't match in style, you may be seeing your candidate first-hand only in the letter.

Résumés are usually prepared in general terms for use in applications to more than one potential employer. Cover letters should be customized for each application and may highlight knowledge or experience that is particularly relevant to the specific job. What candidates choose to highlight may help as you assess the possible match with your performance attributes.

Highlighted Resources

Ontario Human Rights Commission. *Hiring? A Human Rights Guide*. March 19, 1997. <http://www.ohrc.on.ca/english/publications/hiring-guide.pdf>
Appendix B of the document contains a basic sample Application for Employment form.

11.2. Sifting Written Applications

Consider your performance attributes and which of them you can assess from written applications. Any mandatory attributes on your list may help you to filter out effectively. Mandatory attributes are usually factors that are easily recognized. Examples are a valid driver's license, keyboarding skill, experience working in a library or experience managing an automated library system. Be selective in setting mandatory attributes and ensure that they really are things that the successful candidate *must* bring to the job on day one.

By sorting written applications, you are trying to move towards a short list of candidates small enough for the interviewing stage. You probably want at least three and no more than eight. Gather all the applications together and sit down with a block of uninterrupted time before you. Take the set of performance attributes for your first sift. Read the applications looking only for those attributes and record your findings. Your scoring system should be a very simple one at this stage.

Summarize the first screen results on a table or list of applicants as well. You are creating important selection process documentation. Remember that even relatively straightforward attributes must include the equivalences that you allowed for at earlier stages and it may take some reading and judgement to assess that. Work through all of the applications. Assess the scores and determine the top candidates. You may want to expand or contract the size of your short list depending upon how close the scores are among candidates.

If you have a large number of applications and performance attributes you may have to do this phase in several filtering passes, considering only some of your performance criteria on each pass. This makes it easier to score consistently.

At this first stage, you should also make note of any factors that concern you—red flags. These could be patterns such as many job changes in a short period of time or unexplained gaps in the work history or vague language in accounts of work experience. Write them down on any applications that may be in your short list group. Red flags shouldn't necessarily keep a candidate from moving on to the next stage of the selection process but they should be followed up at that next stage and resolved to your satisfaction. They may be problem alerts or they may have very reasonable explanations. You must know which before you make a selection decision.

12. INTERVIEWING JOB CANDIDATES

Far too many people, both managers doing employee selection and interviewees, have the wrong idea entirely about what a job interview is really about. Job seekers may think that they are walking into a minefield where their best course is to predict questions they think will be asked and work up canned answers for them. They have to avoid being themselves and just display abstract "strengths". Interviewers may think that their task is to devise trick questions to trip people up and make them inadvertently display weaknesses. These ideas are wrong and they make people on both sides of the interview table uncomfortable.

The job interview allows for interaction between the manager who will make the selection and the candidates for the position. It is a brief but rich interaction with all of the subtleties of communication (body language, social greetings, etc.) that are missing in a written application. From your point of view, the purpose is to get to know the candidate as well as you can in a short time in relation to the performance attributes required for the job. Each candidate comes to the interview to display competencies and qualifications for you and also to find out more about the job and assess the workplace culture. The interview has elements of a two-sided negotiation and both parties have to participate. It is not just a conversation but an encounter in which candidates must "toot their own horn" and interviewers must probe for personal information in ways that most people wouldn't dream of doing in everyday situations.

A job interview is stressful (for both parties) but it needn't be a dreadful experience. One measure of success in doing very job-related assessment interviews is that some of your interviewees will say as they pack up to leave that they enjoyed the interview and you will know from the surprise in their voices that they truly mean it.

There is also no getting around the fact that there is an element of competition in the selection process and it is particularly evident at the interview stage. You have a group of candidates and you have to assess them against your ideal—your performance attribute set. You have to judge. Remember that you are not deciding who the best human being is; remember that none of your interviewees is likely to be a perfect candidate. You are focused on comparative assessments to determine which of your candidates is the best match to your selection criteria—the best person to hire for this job at this time in your library's staff and service development.

You want to conduct interviews that candidates feel good about, even if they are not selected for the job. One reason is simply that you will meet some terrific people that just don't fit the particular job opening you have this time. You want them to feel good about your library as a workplace and apply again for a different position. You also want them to speak positively about the experience to family and friends. Good public relations apply to every community interaction.

Legal Matters
You want to reel in the candidate that you eventually select but at this first meeting stage be very careful not to overpromise, particularly when it comes to things like flexibility in work schedules. Answer questions in general terms and in relation to the normal practices that apply to all staff. Your answers even this early might be considered part of the verbal job offer and part of a legally binding verbal contract.

Finally, in this general overview, we urge you to be aware that the interview stage is a transition point in the screening process at which you begin to develop a relationship between each candidate and the library's management. One person among your interviewees will probably be your newest employee in a few weeks' time. You just don't know which one yet. It is important that you treat every one of them as if he or she is the one. Be aware as you answer questions and share information about your library organization that you have effectively started two other recruitment and staff development processes. You are already starting to negotiate the job offer and you have already begun new employee orientation. Be conscious of doing both those additional things and your new employee will feel part of the team much earlier than his or her first day at work.

12.1. Planning for Interviews

Employment interviewing is like painting a room. The quality of the final result depends almost entirely on your prep work.

12.2. The Structured Interview

How do you use a series of meetings with your short-listed candidates to make assessments based on your performance attribute criteria with fairness, consistency and accountability?

The answer is the structured interview. The meetings will be planned in detail and, on your side, carefully scripted. With minor exceptions, you will ask exactly the same questions of every single candidate. You will control the interview interaction and use assessment tools that allow you to compare candidates on the selection criteria you established earlier for the job.

Generally, your interview agenda will look like this:

1. Welcome, introductions and small talk.
2. Explanation of the interview content.
3. Asking your scripted questions.
4. Answering the candidate's questions.
5. Closing, explanation of follow-up, leave-taking.

12.3. Logistics

Give careful thought to how and where you will conduct interviews. Consider your own comfort as well as that of your candidates. The work of interviewing is intense.

Legal Matters

Remember that you are in a position of power as the interviewer. Even your welcoming small talk must avoid straying into topics that are forbidden as factors under the Ontario *Human Rights Code.* Talk about things that affect everyone—the traffic or the weather—not personal factors like the need for a babysitter. There is no need to panic if your candidate raises such subjects, just steer the conversation back to the reasons both of you are there.

You have to be in full control of the meetings and yet make that appear easy and natural as you perform the role of host for your interviewee guests. The space you use for interviews should be comfortable for the number of people involved and it should allow for both confidentiality and no interruptions.

Candidates have good reason to expect that their applications will be kept confidential so it is best if each one can arrive and leave without running into the interviewee scheduled before or after. Consider your layout from that perspective. It might be as simple as relocating a second coat tree or you might want to use a non-library location such as a municipal or community building. Enlist the help of someone else on staff. An administrative assistant or secretary-bookkeeper, someone used to work involving confidential information, is a good choice. Explain that the goal is to make your candidates feel as comfortable as possible and also to give a good first impression of the library work team.

You want your candidates to relax and usually that happens sooner with everyone seated around a table rather than across your desk. It is also easier to control interruptions and distractions if you move out of your office area for interviews.

There are some competing considerations when it comes to scheduling your interviews. Assuming one hour for each candidate, you want to allow a half hour between them. You will use this to flesh out your scribbled notes while things are fresh, to do your scoring for each question or assessment area and to take a break from the interview room yourselves. Allow for a generous lunch hour and breaks as needed to maintain your own energy level for candidates scheduled later in the day. With such time cushions built in, you will not run into trouble if an interview runs late.

Know How

Try to have someone other than the interviewer set up appointment times for interviews or be careful about answering questions extensively in the conversations. If you provide supplementary information about the job to one applicant, consider sharing it with all other applicants as well.

The competing factor to consider is that you want to do all of your interviews in as compact a time period as possible. It is ideal if you can meet all candidates in a single day but it usually must be done over two or three days. Try to schedule them on consecutive days. You will be surprised at how quickly you lose track of which candidate said what in response to a specific question. Your detailed note taking serves not only to support your assessment scores but to refresh your memory about answer details as you compare and contrast candidates at the final selection stage of the process.

12.4. Telephone Interviews

You should avoid using telephone interviews unless you have no other options. Their limitations are significant. Conducting interviews for some candidates in person and some by telephone is a serious inconsistency in your selection process.

Telephone contacts might be useful if you have important red flags at the paper screening stage for an otherwise strong candidate. You may want to clarify the areas of concern before deciding whether or not that person will be on your interview short list. In this situation, ask only for the clarifications you need and try to limit the conversation to that discussion only.

Telephone interviews may also be considered if you have a candidate on your short list who lives a great distance away. Smaller public libraries seldom have the budget to pay candidate travel expenses for the interview. Don't rule the person out without some contact. The candidate may have family in your area, be interested in your job because of that, and be able to arrange a visit if you can be flexible on timing of the interview.

Alternatively, you could conduct a preliminary interview by telephone to confirm that the candidate is a strong contender for the job and then follow up with second in-person interviews for your finalist candidates. This option is only open to you if the library will pay travel expenses for the final interview.

All of the telephone variations introduce inconsistency into your process and you must be willing to adjust the whole process to keep it fair for all candidates. Do not consider adding telephone interviews as an easy solution.

12.5. Devising Questions to Ask

There are lots of books you can consult as a job-seeker that purport to tell you what interview questions to prepare for. There are many books that provide hundreds of sample questions for interviewers. We don't recommend any of them. If you have read this far, you know that your questions have to relate directly to the job performance attributes that you established in your analysis of the particular job on a particular team in your particular library. You need to devise your own unique set of questions.

Take each of the job performance attributes that you will be unable to assess based on written applications and résumés alone. For each one in turn, consider what you can ask that will give you answers useful for an assessment of that competency. Consider all of the attributes even though you will probably not be able to cover all of them in a single interview. Look over the priorities you set and concentrate on the questions that relate to your highest priority performance attributes. At some staff levels you may be able to assess more than one competency with a single question. At entry levels and for non-supervisory positions you may not need to test for them all but you may want to ask several questions that relate to key, high-priority performance attributes.

At senior staff levels you should try to use questions that would take five to ten minutes to answer. That means asking only six to eight questions in a one-hour interview. At more junior levels both the questions and the answers will be less complex but you might want to test for a single performance attribute with more than one question. You can probably cover ten to fifteen questions in an hour.

12.6. Types of Questions

Remember that your objective is to get the interviewee to talk freely. You want to learn how your candidate behaves and interacts with the world. You want to use open-ended questions that cannot be answered in just one sentence or two. The interview should concentrate on personal competencies, not the more factual qualifications that can be assessed in written applications.

Some of your questions may expand on what you found when examining the candidate's résumé but most of them will explore how the candidate would deal with critical incidents related to the job. Critical incidents are situations that distinguish excellent performance from mediocre performance in the job. They are the times when the best staff members shine and others simply get through. You will explore critical incidents in a candidate's past experience and also ask them to react to hypothetical situations.

As you develop your questions, you should also develop both effective and ineffective answers. You need to understand how both the question and answer relate to the performance attribute. It is particularly important to talk through the answers with your interview partner.

Information Gathering Questions

Questions asked to gather information that is already on the application form or résumé are a waste of your valuable interview time. If you have a red flag from the written application or need to clarify information, ask the candidate about it either at the beginning or end of your other questions. If you have more than one or two such questions, consider using a telephone call before the interview to clear your concerns.

If physical requirements have been identified as a performance attribute of the job, you might use an information gathering question to confirm each candidate's capability. If any candidate can meet the physical requirements only with some reasonable accommodation for a disability, you must make such an accommodation.

Behavioural Questions

Behavioural questions are premised on the assumption that people's behaviour does not change drastically over time. If they have met a situation in a particular way before they are likely to meet a similar situation in a similar way in the future. Behavioural questions ask a candidate to recount specifics from the past and assume that past behaviour is a good predictor for behaviour (and performance) in the future.

Many large corporate human resource departments run full behavioural interviews. Apart from the opening and closing conversations, the interview script for such interviews is made up entirely of such questions. There is considerable research to support the assumptions on which behavioural interviews are based. Indeed, most of the questions you ask in most of your selection interviews should be behavioural questions.

In devising useful behavioural questions, you must think first of situations that are generic enough that most people would have encountered them if they have the experience you specified as necessary for the job. The situations must also relate directly to demonstration in action of the competency you are trying to explore with the question.

Behavioural questions generally start with phrases like:

"Tell us about a time when …"
"Think of circumstances in which you …"
"Most of us have encountered X circumstances. Tell us about one such experience that you have had."

They often end with open-ended sub-queries like:

"Explain the circumstances."
"What did you do?"
"What happened?"

You want candidates to give you an extended and complete account of their behaviour in the specific example they choose. You often have to follow up with probing questions to get that kind of detail:

"What did you do?"
"How did you do it?"
"Who else was involved?"
"Why did you do it?"

Be prepared to probe several times with your first few questions if your candidate has never before encountered a behavioural question interview.

What If or Scenario Questions

A scenario question presents hypothetical circumstances and often sounds like a miniature story. The question to the candidate comes at the end, "What would you do?" On the surface, scenario questions are trying to assess behaviour in the future and that just can't be done reliably. However, scenario questions shouldn't have a single "right answer" action. You want to present circumstances that provoke complex answers. Looking under the surface, such answers give you a glimpse of the way your candidates think and what assumptions they tend to make. Scenario questions can sometimes get at the values a candidate holds.

Take time to polish your scenario questions. They should not be too long and they must not contain any hints to the candidates about what the interviewer wants to hear in an answer. The circumstances of your scenario should relate to the job and the job competencies you established and it is best if you can develop scenario questions from actual incidents at your library. This means that they accomplish another function secondary to the question. They give information about the job to your candidates. Scenario questions should be used sparingly in an interview script but they can be helpful.

12.7. Asking Questions

The candidates on your short list could be a mix of people who have experience in several hiring interviews and also those who have little or none. The kind of questions you are asking only work for you if the candidate talks freely and recounts details. You have to explain that at the top of each interview, for each candidate. Here is what it might sound like.

> "Just before we start, I want to explain what we have planned. There are several short-listed candidates for this interview stage of our selection process. We have about an hour to spend with you today.
>
> We will be asking every candidate exactly the same set of questions and we expect that will take about 45 minutes. After that, it will be your turn to ask us any questions you have about the job or about our library.
>
> Some of our questions will ask you to recount examples from your experience. If you need to take a few minutes to think of a good example before you start to answer, that's just fine. We want you to be as specific as you can be and include details of your involvement in the example situations so take your time remembering one.
>
> The other thing you should know is that we will be taking notes as you talk. We need to have a good record of your answers for the assessment part of our selection process. Please try not to let our scribbling distract you and we'll try to look away from our pages as much as possible to make eye contact with you. OK?
>
> Then let's move right to question one."

Don't read the explanation off a sheet of paper. This is a time when the candidate is listening carefully for your personal style, speaking rhythms and non-verbal cues. Cover the points necessary in your own words and make it natural for you, but be consistent.

An explanation like this gives your candidate time to settle down and tells your candidate what to expect. This should help in controlling nervousness. The underlying message should help too. You have explained a process, not an adversarial activity. Your sub-message is "We're all here together to engage in this interview."

Know How

Sometimes you will come across a candidate who gets stuck and just doesn't respond, especially to a behavioural question. Remember what was in that introductory script about it being OK if they needed a minute or two to think of an example? Now you have to follow through on that. Remind them of what you said. Suggest that they can use work, school, or volunteer experience for examples. Then stop talking and let the silence drag out. Minutes will seem like an eternity but this is tough love. This candidate can't get the job without demonstrating the competencies you are looking for. In extreme cases, you can offer to go on to the next question and come back to the current one at the end.

Ask your questions. This is when you take on the most demanding work of the selection process. You have to listen with your highest level of attention, carefully and consistently and you have to maintain this super-listening throughout the interview. You get only one chance and you want to take in all the subtleties of communication in person that this interview gives you. Unlike normal conversation, however, you do not want to show agreement or disagreement with the responses from candidates. Listening is your top priority but you have other responsibilities as well.

At the same time that you are listening, you have to stay in control of the interview. For example, you may have to prompt for a more detailed response if it is too general to allow you to assess behaviour. You may have to probe into some areas of the response that need expansion. Don't be concerned that these probes may be different for various candidates as long as you are consistent overall in trying to provoke each candidate to give a full account in his or her answers.

Legal Matters

Such a request is unlikely but the *Municipal Freedom of Information and Protection of Privacy Act* provides for people to examine any personal records you have about them. This could mean that they have a legal right to see notes taken in your interview with them and any scoring assessment you did of them. This would be in addition to their right to examine all records of your process and selection criteria for the job opening. They could see scoring summaries of all candidates as long as the names of all others were blocked out to preserve their privacy.

This means that your notes under question four shouldn't read "Dumb answer!" Your notes should have content related to the purpose of the question or the overall purpose of the interview. If question four was badly handled, make sure your notes summarize how and why— "Response did not relate to the situation requested despite follow-up probes by both interviewers. No evidence given of work as a team member."

Also in this test of your multi-tasking capacity, you have to take notes. You will have to find your own best way of doing this. You may want to write down the answers almost verbatim but you definitely need to record both the general context of a response and some of the relevant details and key phrases used. You may want to grid your notes to record your own thoughts and impressions separately from those that record the answer itself. Make it as easy on yourself as possible. Each question should be printed at the top of a separate page and you should have a blank questions set for each candidate. The assessment cues and scoring format should also be on the sheet. If you need to write for a little bit after the candidate finishes speaking, do that before you move on to the next question.

You should not try to do ratings during the interview but do them immediately afterwards and before you and your interviewing partner get into any discussion. You want your own impressions so that anomalies between you will show up clearly and you can discuss the reasons. One person may hear something quite different than another and it is useful to explore why.

12.8. Answering Questions

Make sure you allow time for your interviewees to ask questions of you. In fact, sometimes their questions tell you a great deal about their motivation and whether or not their work experience gives them a realistic picture of the job you have.

Do keep the interviewee's question time to the end of the interview. This separates the two aspects of the meeting—information gathering and information giving. In addition, you will have shared virtually the same information with all candidates before the interview and you have a common base from which to evaluate answers to your questions.

12.9. Testing

Your selection process may include testing in addition to the interview. Large corporations use a wide variety of standard tests in their recruitment and selection processes—intelligence tests, personality tests and aptitude tests. Such tests must be based on widely accepted research; they must have a proven track record of validity in testing what they purport to test. Such tools are expensive. They are beyond the means of smaller public libraries but a small organization, in which the manager doing selection is so close to the work, probably doesn't need them.

However, you can use testing that is related directly to the requirements for the job by asking candidates to demonstrate their competencies in work sample exercises. Usually these are done as part of or immediately after the interview. Sometimes the assignment is given well in advance of the interview and candidates are asked to come prepared to present results and/or conclusions. In other cases the task assignment is given at the interview and done immediately. In many cases, testing can be done as you go on to the next interviewee but you will need an assistant to move candidates to another workspace, monitor time limits, gather completed assignments and show candidates out.

Performance Attribute Testing Examples

Performance Attribute	Possible Test
Information Services Assistant	
• Listening skills	--
• Advanced database and/or Internet searching skills	• Find answers in catalogue and on Internet for a set of sample reference inquiries
Children's Services Assistant	
• Able to "connect" with young children	--
• Performance skills as a reader and song leader	• Read a pre-selected children's book as if the interviewers were an audience of toddlers
Circulation Assistant	
• Able to follow detailed procedures	--
• Able to enter transaction data through a computer interface	• Fill out and print a form on the web (using an Internet browser tests ability without requiring training in any specific software)
• Able to make neutral "small talk" conversation with ease.	--
• Able to count currency and make change accurately	-- (Test setup would be complex and probably not worth the effort)
Page	
• Able to follow detailed procedures with consistency and accuracy	• Take a sample of books randomly arranged and put them in Dewey decimal system and shelf order
Branch Head or Assistant Librarian	
• Able to motivate others to accomplish service objectives	--
• Excellent communication and teaching skills	--
• Broad reading tastes and habits	• Write a short book review on any recently read book for a "We Suggest" booklist handout
• Excellent general knowledge and awareness of current events	--
• Values intellectual freedom	• Draft a reply to a letter of complaint (supplied) about an 'unsuitable' title

Be cautious in using tests as part of your selection process. Some performance attributes simply do not lend themselves to testing or demonstration. Testing may not be necessary or suitable for all jobs and you should not force it or overuse this step. You run the risk of making one performance attribute too important in your own assessment and in the impressions of the job that your candidates take with them.

Highlighted Resources

Appendix E-H. Interview Question and Question Sheet Examples.
Examples of both behavioural and scenario questions are included.

Appendix I. Interview Checklist Example.
Adapt this to your own process and keep a copy in the front of each candidate's file folder.

For Further Reading

Camp, Richaurd, Mary E. Vielhaber and Jack L. Simonetti. *Strategic Interviewing: How to Hire Good People*. San Francisco: Jossey-Bass, 2001.
Written for a business school audience but just as useful to selection interviewers. It includes an extended discussion of how to develop questions and the answers for questions.

Cohen, Carolyn. "The Polished Interviewer." *CA Magazine* 135.9 (November 2002): 35-36. *Business Source Elite.* Ebscohost.
An interview is more than asking questions and this short article provides basics on some other components.

Curzon, Susan Carol. *Managing the Interview: A How-to-Do-It Manual for Hiring Staff*. New York: Neal-Schuman, 1995.
Part of the How-to-Do It Manuals for Libraries series. This title includes the logistics of interviewing and its examples are library ones but the book predates widespread use of behavioural interviewing.

Frase-Blunt, Martha. "Games Interviewers Play." *HR Magazine* 46.1 (January 2001): 106-114. *Business Source Elite.* Ebscohost.
Explores the use of off-beat or creative interview questions and why-quirkiness is never an end in itself for a good interviewer.

Gercken, George E. "Five Steps to More Effective Interviewing." *Training & Development* 50.11 (November 1996): 11-12. *Business Source Elite.* Ebscohost.
An HR coach's basic advice for hiring managers.

Ream, Richard. "What's My Hiring Line?" *Information Today* 19.5 (May 2002): 18-19. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through the Ontario Library Association web site: <http://www.accessola.org/members/>
Some tips on preparation for the interview as well as suggestions to foster good communication.

Thompson, David W. and Nancie Noie Thompson. "The Art of Interviewing Your Next CEO." *Trustee* 56.2 (February 2003): 14-18. *Business Source Elite.* Ebscohost.
Written for trustees hiring a CEO, this article has excellent advice on how to ask questions, probe for more useful information and listen actively in order to assess behaviour.

13. REFERENCE CHECKING

There are a number of reasons to check references; don't ever skip this step in your hiring process. The first reason is simply to verify information that your candidate has provided to you. Check for basics such as dates of employment, job title and responsibilities. Ask about any outstanding red flags. If the candidate's experience working on a specific project has been a big part of your positive evaluation, check with a reference to confirm the extent of responsibility in that work. The second reason is to gather additional information that is not readily available in any other way. Pursue assessments of honesty, integrity or attendance that only a third party can assist with. Does your candidate have failings that counter his or her merits?

Reference checking takes considerable time. Check references only for the candidate that you finally select for hire but prior to any job offer. Alternatively, you might want to check them for the top two candidates if you are really unable to choose between them on any other criteria. People are busy and, for municipal public libraries and others in the public sector in Ontario, there are considerations of procedure and policy necessary to comply with personal privacy legislation.

Legal Matters

Many organizations have job applicants sign a release to authorize questioning of references. For libraries in Ontario there is an additional consideration. Under the *Municipal Freedom of Information and Protection of Privacy Act*, it isn't the person asking questions who needs permission from the candidate but the person answering such questions.

Here is a place to take some initiative and provide an optional permission form to all of your current employees. There is an example in Appendix J. Put completion of the form on your Employee Exit Checklist for staff members leaving your employ. That way you can have the completed permission form in their personnel files when someone calls on you to provide a reference.

We suggest that you *not* ask for references at the application stage but ask candidates to bring the names of references to the interview. At the end of each interview, you can confirm that the candidate has alerted their referees and given them permission to speak freely about the candidate in relation to your selection process. You may also want to have candidates sign a release for reference checking and a statement verifying the truthfulness of the information provided in their application form and/or résumé.

You should expect to be able to contact a reference at each of your candidates' previous employers unless the employment relationship ended a considerable time in the past. If there is none provided for an employer you want to contact, ask for a reference from that context. There are many possible circumstances in which candidates will not want their current employer to know that they are seeking a new job. Respect their wishes. Check everything else first. Then, if necessary, you can make a job offer conditional upon a satisfactory reference from the current employer.

References given by peers or subordinates of your candidate in a previous employment context can be very useful. Don't assume that a reference contact always has to be the person's supervisor. Don't, however, reach a conclusion based on peers alone.

Have specific questions prepared to ask reference contacts and be sure that they relate to the competencies for the job. Ask the same set of questions of everyone you speak to so that it is easy to compare responses. Where necessary, probe deliberately but use neutral language. Don't let the conversation stray into areas that are prohibited from consideration in hiring. References should be checked by telephone unless there is some unusual reason to do it by correspondence. A conversation with the referee will give you more spontaneous answers. Listen carefully and listen for what is not being said as well as for what is. Take notes in just the way that you did during the interviews. There are examples in Appendix L of generic questions to ask of references. You should adapt and develop questions appropriate to your particular job candidate selection.

Know How

Both in seeking references from others and in acting as a reference yourself, you should be aware that applicants have legal recourse for negative references that are unfair and dishonest.[16] Some companies will provide no information about a former employee rather than open up that possibility. This can mean poor outcomes for everyone, including the applicant. The law protects referees who give truthful accounts—even if negative ones. This is another reason to keep good documentation and to retain a former employee's personnel file for years after they leave. With documentation, you can prove that negative assessments are based on fact.

You want to establish some level of trust with those references you call. Introduce yourself and explain that you have already interviewed the candidate. Ask if you have called at a time that is inconvenient and offer to set another time as a telephone appointment. For more senior staff positions, you may want to suggest that you will e-mail a copy of your job description to the referee and schedule a time to talk after they have had a chance to scan it.

If you have identified a particular weakness in the competencies of your top candidate, identify it for the referee along with a very brief summary of the job they have applied for. Ask for an assessment of whether the candidate can become strong enough in that area to do the job successfully. If referees know a person well, they may have some very good advice for your orientation and training stage.

13.1. Screening

If the specific job you are offering requires any verification or screening steps you must have written permission from the candidate to pursue those steps before you proceed. Screening requirements must be job specific and all candidates should have known about any such prerequisites from the job description.

Completing a screening process can involve costs for the employer and you want to undertake this step only for the candidate selected. If any required screening steps cannot be completed immediately, make the job offer conditional upon satisfactory completion of those steps.

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[16] The laws of libel and slander apply only if comments are not made honestly. There is some opinion that Ontario's *Consumer Reporting Act* also applies to job references.

Highlighted Resources

Appendix J. Employee Reference Permission Form from Wentworth Libraries.
Completion of this form was on the exit checklist for employees leaving the organization but it was also used for current employees who needed to provide references.

Appendix K. Release Form Examples for Reference and Screening Checks.
Check to see if your municipality or First Nation community uses standard forms.

Appendix L. Reference Checking Question Examples.
Adapt questions to the specifics of the job and the candidate.

Ontario Screening Initiative. *Ontario Law and Social Policy: Implications for Screening.*
Volunteer Canada. September 2002.
<http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php?display=4,0# >
This background paper provides the legal context for screening decisions.

For Further Reading

Graff, Linda L. Beyond Police Checks: The Definitive Volunteer & Employee Screening Guidebook. Dundas, Ontario: Graff and Associates, 1999.
A useful and detailed review of the screening aspect of employee or volunteer selection. As the title suggests, the book considers written applications, interviews, and reference checking as screening tools as well as other options such as police checks, credit checks and medical tests. Screening tools must be directly related to the requirements of the particular job. The book suggests some ways to assess both jobs and risk.

Levitt, Howard. "If You Can't Say Something Good, Say Something Bad.". *Financial Post (National Post)* 1.28 (November 27, 1998): C17. *Fulltext Select.* CBCA.
This article provides advice to those acting as a reference.

14. MAKING A JOB OFFER

Once you have decided which of the candidates to choose for the job, move as quickly as you can to get his or her commitment to join your staff. If other candidates are possible choices, keep them as active alternative options. Remember that you are in a negotiating exercise with job seekers. You haven't finished the recruitment process without a successful job offer negotiation.

Board Sense

A CEO at the stage of developing a job offer must have the authority to make an offer and negotiate its terms. Has your board granted that authority to you in a policy statement, in your job description or in a statement of authorities? If you are not sure, clarify before you get this far.

The CEO should be able to hire within the budget envelope and salary schedule approved by the board. That authority should have been granted in some general way and there should be no need for a specific board action for each hire.

On the other hand, you may wish to discuss the filling of a vacancy with the board in advance if non-competitive wage rates are likely to be a problem or if the budget for the year has not yet been approved.

The negotiation will differ with different circumstances—the degree of experience required for the job and brought by the candidate and particularly on whether or not it means resigning from a current job to accept your offer. Money will be the major factor, as salary/wages or as benefits. Other factors can play a very large role. Consider quality of life factors such as a shorter commute to work or new opportunities for continuous learning.

Consider what you will offer and make some notes. If you expect, given the circumstances, to negotiate on dollars then decide first on the highest rate in the range that you will move to and then decide on the level for your opening offer. Your flexibility is probably quite limited but there should be no surprise from your candidate. You gave all of them the salary range on the job description before the interview.

Move on to benefits. You have even less flexibility to negotiate here but note the basic facts of your offer including:

* Paid vacation time.
* Waiting period for benefit coverage, if any.
* Benefits included such as long and short term disability or sick leave, life insurance, supplemental health coverage and dental or vision care.

If you are offering a position that does not include full benefit coverage, note your policies for vacation pay or vacation time and for leave for illness or other reasons.

Clarify the probationary period and make note of the weekly work schedule assignment and any variations such as flex time. Repeat the necessity for any pre-employment conditions such as police check or drivers' license verification that have to be completed before starting work. Next, consider a reasonable start date assuming the candidate gives as much notice to his or her current employer as you would want your employees to give you. Pick a date as a starting place in your offer.

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Legal Matters

A verbal job offer is a contract offer and your candidate will rely on your words to make an important decision. Be clear and be accurate. Don't be reassuring in ways that could be interpreted as promises that you can't keep. You need to take notes of all discussion points. One way is to use pages with three columns. Start with your offer terms in column A. Write notes of your candidates questions or proposals in column B and note what you say or what the two of you conclude in column C. Date and sign these handwritten notes and keep them in the candidate's file with all other documentation. You want to be able to show exactly what you offered in case of any disagreement or dispute.

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Clean up your notes and add any other talking points for your discussion. Usually, the job offer is made in a telephone conversation with your first choice candidate. You want everything clearly set out in your notes because you are making a legal contract offer as you do this. Tell the candidate that he or she is your choice and that you are making a verbal job offer with the following terms; then list all of those terms from your notes. You may get a yes on the spot; you may get questions of clarification about the terms; you may get a request for some time to think it over. It is reasonable for a candidate to ask for some time but put a limit of one or two days on it. You (and your other candidates) need to know the outcome as soon as possible. If discussions move into monetary negotiation, don't be drawn any higher than you had determined beforehand.

If you finally get a "no" to your job offer, thank the applicant and wish them well. Move on to one of your alternative choices and repeat the job offer phase. If there are no applicants that have your required performance attributes for the job, do not hire just to fill the vacancy. You will regret it. Extend your work reassignment arrangements and take some time to rethink and regroup for another selection process.

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Legal Matters

It is important that you provide a *complete* copy of employment policies and practices. Details such as method of pay or the timing of vacation pay payments require employee consent in writing. Avoid inconsistencies by ensuring that all of these things are part of the offer and get written acceptance of its terms.

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Once you and your chosen candidate have agreed on acceptable terms, explain that you will send a written "letter of offer" and that you would appreciate a written acceptance promptly. This letter and the library policy documents it refers to form the employment contract for your new employee. Enclose a *complete* copy of any such policy documents with the letter and arrange to have it delivered the next day. Send two copies of the letter—one to be signed and returned to you and another for your new employee to keep.

14.1. Closing the Recruitment Process

Once you have a signed letter of acceptance, you should contact the other candidates. For short-listed candidates, do this by telephone if you can but don't leave messages. If you can't reach someone after several attempts, send a letter. Be prepared for questions about how the candidate could have done better. Your interview notes and ratings will help here. Be helpful (tactfully) if you can but explain that the process involves comparison of strengths within a short-listed group. These calls are not easy to make but people do appreciate the personal acknowledgement. For applicants you did not interview, you can send a letter to inform them that you have made a hiring decision.

Make sure that your documentation for the whole process is complete and filed appropriately. Keep all applications plus the contact files and interview notes for short-listed candidates for whatever period is established in your library policies. It should not be any less than six months. The contact file, notes and reference checks for your successful candidate become the first documents to go into his or her employee personnel file.

Discuss the timing and content of the hiring announcement with your new employee in advance. Courtesy may require that other people be informed first. Use the announcement both to introduce the new staff member and to celebrate your library.

15. SPECIAL RECRUITMENT / SELECTION SITUATIONS

Public libraries deal with a number of situations that follow the general principles and processes set out above but also have some specific twists to them.

15.1. The Chief Executive Officer

This guide is written primarily for CEOs and the paramount guideline to CEOs leaving a library organization is to stay out of the decisions on selection of the CEO to replace you. First, it is a primary responsibility of a municipal library board, specifically assigned in Section 15(2) of the *Public Libraries Act*. Second, just as we said that having board members involved in interviews for staff positions interfered with the ability of both you and your candidates to assess the potential work relationship, your presence in the selection process would have the same effect on CEO candidates and board members. Your involvement should be limited to comments on some of the CEO performance attributes that the board should consider for the future. You might also provide them with a picture of the job and the proportion of your time spent on various functions. Board members often underestimate the time that staff supervision requires, for example. Provide input if asked, but back out before the board sets selection criteria.

> **Board Sense**
> If you have built a solid relationship of trust with your board, this is your last opportunity to put it to use for the benefit of library service. Encourage your board to develop a selection process of integrity that enhances the reputation of your library. As you know, the CEO vacancy is an opportunity to make changes. Offer your suggestions on realignment of job assignments but don't push. This work reassessment phase is one of the reasons that outside assistance may be necessary. Finally, encourage your board to consult with library staff in determining performance attributes for their search.

You should, however, give your board good advice about the selection process that they must undertake. They should probably seek some impartial professional advice and assistance to help them through the process. As you now know, it involves process planning, detailed record-keeping, consistent communications with applicants and careful adherence to privacy requirements. It takes a significant commitment of time. Expert assistance will keep the board's selection process on track.

One possible source of such help is your local, regional or county municipality or your First Nation community administration. Be sure, however, that the board will be dealing directly with a manager who has human resources expertise.

Another possibility is to hire an executive search firm (popularly known as headhunters) that has experience in the library field. You might contact colleagues in libraries that have done a CEO search in recent years and used a search firm. SOLS provides such CEO search support in its offering of fee-based services available to libraries.

Highlighted Resources

Charan, Ram "How to Lower the Risk in CEO Succession" *Leader to Leader*. 17 (Summer 2000): 26-32. Leader to Leader Institute:
< http://drucker.org/leaderbooks/l2l/summer2000/charan.html>
Advice for boards on some of the decisions involved in a CEO search.

For Further Reading

Gossage, Wayne. "The Selection Process for a Public Library Director." *Public Libraries* 37.6 (November/December 1998) 356-357. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through OLA web site: <http://www.accessola.org/members/>
The perspective of a search firm with experience providing service to library boards..

Sager, Don. "Evolving Virtues: Library Administrative Skills." *Public Libraries* 40.5 (September/October 2001): 268-272. *Library Literature & Information Science Full Text*. H.W. Wilson. Available through the OLA web site: <http://www.accessola.org/members/>
An executive recruiter for larger libraries discusses competencies and change.

Thompson, David W. and Nancie Noie Thompson. "The Art of Interviewing Your Next CEO." *Trustee* 56.2 (February 2003): 14-18. *Business Source Elite.* Ebscohost.
This article has excellent advice on how to ask questions, probe for more useful information and listen actively in order to assess behaviour.

15.2. Technical Jobs

Smaller libraries do not have a large number of technical positions, but those that do exist are significant in a library's service quality efforts. How do you hire someone when you don't have enough technical knowledge yourself to judge the specialist expertise of your applicants?

You need to get some help and you need to define the competencies required for successful job performance with the big picture in mind. Yes, there will be some technical knowledge requirements but, notwithstanding the specific comments in this section, don't let those overshadow the attributes that make this person a valued member of the library team:

- Ability to explain technical matters to those without specialist knowledge and especially to provide such explanations to the CEO so that he or she can both brief the board and make informed recommendations.
- Ability to train other staff in the use of information technology and empower other staff to manage it appropriately.
- Ability to set priorities and manage time.
- Ability to monitor new technology developments, learn to use it and recommend applications suitable for your library.
- Ability to work as a team member on library strategies and goals that do not directly involve information technology.

Non-technical library managers often underestimate their knowledge of information technology. As you collect advice, don't give up your primary role and responsibility to select the best candidate to add to your library staff.

Seek help in revising the job description and identifying the job competencies. Be careful not to get overly specific. For example, familiarity with any collection control system used in libraries probably means that they could readily learn to work with your specific brand of software. Consider the following options within your own circumstances:

- Ask the outgoing incumbent, if appropriate, to identify competencies and even simple ways to test candidates for them.
- Contact the IT vendors you use but don't rely on their suggestions alone.
- Seek advice from SOLS library development consultants.
- Contact the manager of the IT unit at your municipality, if appropriate.
- Contact the IT manager at a respected local company.

Use several sources if you can. If this process leads to someone who is interested, helpful and not likely to try to co-opt your decision, consider inviting him or her to interview with you. Alternatively, devise a written work sample test together that this person can evaluate for you without knowing the names of any candidates.

Overall, be careful not to put too much weight on the technical knowledge required for the job and undervalue general library knowledge and team skills. When you interview, be open about your lack of technical knowledge and ask all candidates to respond to questions with that in mind. It is a valid job related test of a key aspect of their competency set.

For Further Reading

Falcone, Paul. "Tech Interviews for The Non-Techies" *HR Magazine* 46.10 (October 2001): 133-138. *Business Source Elite*, Ebscohost.
Advice to HR practitioners that can work for you too.

Schuyler, Michael. "Hiring Systems People: Interview or Inquisition?" *Computers in Libraries* 17.6 (June 1997): 42-44. *ProQuest*
The perspective of someone who has often been the external technical expert for interviews.

15.3. Pages

Your process for hiring pages follows the steps above but you probably need to review the work and the job description less often. You may want to reconsider the number of page work hours, however. Perhaps some dollars currently paid to pages should be redirected to increased hours for regular staff working on circulation duties. Such a change might give more depth or capacity to your staffing and make schedule coverage for illness or vacations less strained.

Potential problems in hiring pages are in the announcement and recruiting stages. We usually think of pages as high school students, but they needn't be. Assuming they will be could lead you to be discriminatory on the basis of age[17]. Don't post your page vacancies only through notices at the local high schools. Don't recruit by asking for student referrals from a teacher contact.

Be prepared for retirees or other adults to be applicants and be prepared to explain the physical aspects of the work.

Know How
Students need to have Social Insurance Numbers for you to pay them, but it is illegal to ask for one as a condition of hiring. One way to get the application process underway early is to include information from the Human Resources Development Canada web page on applying for a new or replacement SIN http://www.hrdc-drhc.gc.ca/sin-nas/0200/0200_010_e.shtml. You might even include a print-out of the PDF application form from that site. Be sure to give the same information to all candidates.

Your applicants may be at the extremes of work experience. Young people will have little or none. Retirees will have a great deal but perhaps not in positions of limited responsibility. Adjust your interview plan to ask a greater proportion of scenario questions than you would for other positions.

Make sure that you explain the boundaries between page work and work that regular staff does, and explain that excellent performance as a page will not result in being assigned work that is a regular staff responsibility. Different wage rates require that the work be different; pages should not be used as backup service desk staff. In smaller libraries these boundaries are difficult to maintain. Use the interview and the probationary period to establish clear and shared expectations. Provide candidates that you interview with copies of your policies and practices applicable to pages. The documents should be clear about which overall policies do, and do not, apply to pages, especially wage rates, holiday, leave and schedule change practices, and status (or not) as internal applicants for other library jobs.

Using a job task test with pages is a good selection process choice. You can have them alphabetize a set of author names printed on cards or sort cards (or books) into Dewey order. This also shares information with your candidates about what kind of work they should expect to be doing.

15.4. Contract Employees

In some situations, you may want to hire someone to work only for a specific time period or on a specific project. In identifying such a situation you have started to clarify the work to be done and the job description. Write it up in the same format as other job descriptions and mark it prominently as a contract position. Specify the time period of the contract on the job description itself.

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[17] Ontario's *Employment Standards Act* specifies a lower minimum wage for students under 18. This does not mean that you can choose to employ only those who are paid at the lower rate and you certainly cannot terminate employees simply because they turn 18. Policies should refer to the "applicable minimum wage" if necessary, not to the "student under 18" minimum wage.

In this and in all subsequent documentation for this position and the recruitment process you use for it, you should prominently label and identify it in this way. You want to avoid any possible chance for any applicant to mistake the contract job for a position on your regular staff.

Know How
If your payroll function is handled by your governing body, determine before you advertise a contract position how the pay details can be handled. Finding out about possible snags after you have arranged a start date is simply too late.

You should screen and interview with just as much careful preparation as for other selection processes. When you reach your decision, you will make a contract offer rather than a job offer. It should spell out all terms and conditions and include a statement that the relationship between the contracting parties terminates after a specified term. You should have legal advice in finalizing the wording of such a contract unless your municipality or First Nation community administration can provide a template for the version that it uses and for which there has had legal advice.

Many public libraries have experience with contract employees through federal or provincial summer student grant agreements. In these cases, the granting agency provides a detailed contract to be signed and your offer can be a brief statement referring to the grant document and its terms.

15.5. Volunteers

The simplest way to ensure that you manage volunteers well is to think of them as employees who happen not to receive a paycheck. That habit of mind helps you to identify aspects of policy that need to be in place for volunteers and also to be aware of their cost to your organization. In addition, you need to identify volunteer vacancies with the same review process that we outlined for paid job vacancies and apply fair volunteer selection processes[18]. The Burlington Public Library models this way of thinking for its community by grouping employment and volunteer opportunities together on its web page and listing current opportunities in both categories: http://www.hhpl.on.ca/library/bpl/libinfo/jobs.htm.

Volunteers require the same investments of training, oversight and recognition as paid employees. Don't underestimate that cost in comparison to the benefit they bring and don't be pressured into taking on more volunteers than you or your regular staff can supervise. Select them carefully and match them just as carefully to the available work, avoiding any overlap with the responsibilities of regular staff. Be aware that work that puts volunteers in contact with vulnerable persons requires that you take reasonable steps to protect those persons to comply with your legal "duty of care". You may want to reassess a program to eliminate such work or screen the volunteers assigned to it.

Use a volunteer application form that includes a question about why they are volunteering and what they want to contribute. Use these application forms to screen applicants. You or an alternate library manager should interview volunteer applicants before a final decision is made.

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[18] General provisions of the Ontario *Human Rights Code* apply to volunteers and it is both easier and safer to assume that all sections of the *Code* apply, even those that refer specifically to employment.

Many people misunderstand the day-to-day work of libraries and most volunteers want to make a meaningful use of their talents. The combination of these two things can lead to some unrealistic expectations. You are much better to reject an applicant with thanks than to go along and create a disappointing experience for a community member and a frustrating one for your regular staff.

When you do select a volunteer applicant, make a written offer of a volunteer position just as you would a job offer. Outline the nature of the offer, note any library policies that apply to volunteers, name a supervisor and an expected work schedule, outline a regular performance appraisal process and, most important, set out the conditions and notice periods for termination of the volunteer work relationship. You hope never to have to fire a volunteer but it must be clear from the start that you can do so and will do so if the work contributed is of no benefit to the library.

Highlighted Resources

Burlington Public Library. Job & Volunteer Opportunities.
<http://www.hhpl.on.ca/library/bpl/libinfo/jobs.htm>
Burlington Public Library. Library Volunteer Application.
<http://www.hhpl.on.ca/library/bpl/pdf/volunteerapplication.pdf>
A form that the public can access directly on BPL's web page.

Ontario Screening Initiative. Volunteer Canada.
<http://www.volunteer.ca/volcan/eng/content/screening/ontario-init.php?display=4,0# >
We noted this resource earlier in the guide. It is repeated here because the primary emphasis of the Initiative is screening of volunteers.

Valuing the Rural Volunteer Toolkit. The Ontario Rural Council (TORC).
<http://www.torc.on.ca/torceng/memact/VRVToolkit.htm>
An in-depth resource for those managing volunteers. Tools for volunteers to use include self assessment of motivation and skills. These could be incorporated into recruitment processes.

16. CONTINGENCY PLANNING

Planning ahead for change in your library staff is a very good idea. Retirements are vacancies that are known well ahead of time but other vacancies can be provided for even when you cannot predict exactly what the vacancy will be.

The basics of contingency planning include having your goals and performance objectives and all of your job descriptions up to date and in alignment. If you are in that state of readiness when a specific vacancy arises you can do a quick review assessment rather than a major overhaul before you advertise.

16.1. Crossed Responsibilities

The first tool you can use in contingency planning is one that serves you and your library service well for a far broader set of reasons. Create a task assignment back-up plan and make every single member of your staff share in the responsibility for making that plan effective. A crossed responsibilities plan ensures that no one can hoard work tasks to become indispensable. Such behaviour is counter-productive to good service and to staff development and you should never reward it.

Take each position on your staff and list the tasks or functions that that person performs. Generally you can leave off front-line public service work because that will get handled in any reallocation of schedule that has to be put into effect. Concentrate on the discrete tasks that are not normally shared among all staff members. List each person and his or her regular functions as rows and sub-rows down the left side of a table. Then create columns for short, medium and long-term absences from work. Fill in the cells of your table with names of the employee who covers that task for such an absence. There is a sample of this kind of table in Appendix N. You will want to consult with everyone as you develop this and review a draft together at a staff meeting. If your library staff is large enough to work in teams, prepare plans for each team with some cross team overlap wherever necessary.

Try to balance the work among remaining employees so that no one gets an unfair load. Do not give any one person too many functions that involve inflexible due dates. As you implement such a "crossed responsibilities" contingency plan, make sure that all staff members understand that it is their responsibility to train their back-up buddies to do every single part of the function and to remember to retrain as that process changes. Make it part of the performance expectations for each person's annual review. Be sure that copies of the plan are easily available to all staff members and ensure that outdated versions are discarded. Reevaluate the overall plan at a staff meeting every six months and especially after any occasion that it has been put into effect in response to an extended absence.

Know How
Include the CEO's duties on this table. No one is indispensable (or immune) and if you're the one hit with an emergency, you don't want to be worrying about how things are being covered at work. Make sure you brief your board chairman about the person who has responsibility for board contacts in your absence.

Obviously, this kind of crossed responsibilities plan works just as well to deal with a vacancy. It may give you clues about what work tasks could fit together in a better way as you do a work review. Most important it ensures that a vacancy doesn't feel like a crisis. Your recruitment and hiring efforts should be treated as a long-term staff development decision, not a fire-fighting emergency.

16.2. Succession Planning

Succession planning is a particularly focused method of contingency planning. It involves taking steps to groom replacements for a predicted vacancy well before it exists. In some cases, it goes as far as officially appointing someone in advance with a long transition period before the appointment actually takes effect.

Overall succession planning can be a regular part of your recruitment and hiring decision process. Other things being equal among candidates look to the one that you think can move up through promotion. General planning also means identifying current staff members who want to take on increased responsibility but need to expand their knowledge to do so effectively. Staff development can include opportunities for training through workshops or more extended continuing education programmes such as a college library technician's diploma, EXCEL, the ARUPLO training programme known as Kempenfelt or First Nations Library Gatherings. Libraries might also find short term staff exchanges valuable in expanding horizons.

Appointment in advance to a vacancy known to be coming in the future is the ultimate form of succession planning. For smaller libraries this might be a good way to deal with the expected retirement of a chief librarian. It would work best when a library's mission, service goals, board turnover and board relationship with council or band administration are all relatively stable. A library pursuing such a succession option must consider how an offer can be made that reasonably binds a board to future action. The selected candidate and the board should each seek legal advice before a final job offer is made and accepted.

Highlighted Resources

Appendix N. Crossed Responsibilities Contingency Plan Example.
This sample shows only a few job tasks but shows how to document your plan for easy use.

17.   SEEKING ADVICE WHEN YOU NEED IT

This document is a very general guide to staff recruitment and hiring. There may be a time, however, when you find yourself with a situation that calls for more specific advice.

Your first step is to think through whether your situation calls for you to get legal advice. If your answer is "yes" or "probably yes" you will proceed differently and we will come back to that. Many situations, however, can be complex ethical or process problems without being legal ones. If that describes your situation then you can choose among several options. Remember though that you are seeking advice for your actions as CEO; you can't dump your responsibility for decisions on someone else. Consider talking the circumstances over with one or more of the following people:

- A trusted colleague, especially an experienced CEO.
- A SOLS consultant.
- A trusted senior municipal manager or First Nation community administrator.
- A human resources manager at a larger municipality.

People are generally willing to share their expertise if you ask clearly and accept responsibility for your own actions. Explain the situation without specific personal details that they don't need to hear. Preserve the privacy of the individuals involved. Outline the actions or events that are coming next and explain what worries you about them. People are more likely to be helpful if you ask "What should I be taking into account in this context in making my decision?" rather than "What should I do?"

Situations calling for legal advice should be handled differently because, in Ontario, it is illegal for anyone other than a lawyer to offer legal advice. Don't put someone in an awkward situation if legal advice is what you need. However, if you are really not sure then consult with others as suggested above *only* about the question of whether or not you should be speaking to a lawyer.

Board Sense
Ideally, you and your board will have considered the possibility of needing professional advice in employment law long before it ever arises. Your budget will include a small contingency for such situations and you will be authorized to make a contact whenever needed. Such an arrangement reduces delays when a situation comes up and avoids the danger of creating a crisis atmosphere.

You are acting as an officer of the library board at this point and the board should be aware of the need for legal advice. Keep your board chairman well briefed on how things are proceeding. Be aware that you may have to go beyond your local area to find a lawyer who works in employment law.

If there is no potential conflict of interest between the municipality and the library in your circumstances, contact the law firm that the municipality uses for employment or labour law.

If that lead does not work, consider using the Lawyer Referral Service of The Law Society of Upper Canada outlined at http://www.lsuc.on.ca/public/referral_en.jsp. For individuals, they will arrange a free 30 minute consultation with a lawyer. Ask for and confirm that arrangement for your library, a corporation, in advance. Many lawyers would agree and even such a short consultation may be all you need.

18. GETTING STARTED

Now, having walked through the selection and hiring processes, you can see why it is important to keep the big picture in mind. You have to work at it based on what is needed for the team, the organization and its mission. Everything is interrelated. If you improve your alignment of library goals with individual employee performance objectives, you create a more attractive workplace. If you devise job-relevant interview questions, you make better hiring decisions and the library staff team that develops over time is strong, competent and innovative.

Aligning strategy with your mission and goals is a continuous task for the CEO. It is a cycle of continuous change and adaptation. Adjustments and improvements at any phase of the cycle affect the next and subsequent phases. This means two very important things for your efforts in staff recruitment and development.

First, small steps matter. If you navigate carefully and consistently in the direction of your mission and organizational vision, those small steps are cumulative. Start small, but start.

Second, you can introduce change anywhere in the cycle. Pick the selection process for a vacancy you know of in advance or work on job descriptions that haven't been revised in much too long. Pick what interests you most or what your library needs most. Start anywhere, but start.

For Further Reading

Here are some books that deal with the whole process of recruitment and hiring rather than just one phase of it. Some titles were written for small businesses and match well with smaller libraries. Be careful with any discussions of law in non-Canadian titles.

Beauregard, Monica and Maureen Fitzgerald. *Hiring, Managing and Keeping the Best: The Complete Canadian Guide for Employers.* Toronto: McGraw-Hill Ryerson, 2000.

Butteriss, Margaret. *Help Wanted: The Complete Guide to Human Resources for Canadian Entrepreneurs.* Toronto: John Wiley, 1999.
Ontario. Ministry of Culture and Communications. *Sourcebook for Small Public Libraries: Personnel (Administration 4).* Ottawa: Southern Ontario Library Service, 1991.

Rosse, Joseph and Robert Levin. *High-Impact Hiring: A Comprehensive Guide to Performance-Based Hiring.* San Francisco: Jossey-Bass, 1997.
This title was written by consultants to large corporations and is based on research but it has a very practical approach for anyone who wants an in-depth discussion. Some advice has been simplified and summarized in this guide.

Rubin, Richard. *Hiring Library Employees: A How-to-Do-It Manual.* New York: Neal-Schuman, 1993.
This is a straightforward guide with a public library context that has begun to show its age. It includes a chapter on orientation and training.

Schwind, Hermann F., Hari Das and Terry H. Wagar. *Canadian Human Resource Management: A Strategic Approach.* 6th edition. Toronto: McGraw-Hill Ryerson, 2001.
This textbook has been widely adopted in college and university programmes that train human resource professionals. It makes a good reference book for managers.

APPENDIX RESOURCES

Documents included in the Appendix are examples, not models. Adapt them. Use them to prompt ideas for your own work tools and forms.

Appendix A: Job Description Example – Clarington Public Library

Appendix B: Job Description Example – Haldimand County Public Library

Appendix C: Job Description Example – Pelham Public Library

Appendix D: Job Posting Example – Halifax Regional Library

Appendix E: Interview Question Examples – Behavioural Questions

Appendix F: Interview Question Examples – Scenario Questions

Appendix G: Interview Question Sheet Example with Notes

Appendix H: Interview Question Sheet Example

Appendix I: Interview Checklist Example

Appendix J: Employee Reference Permission Form Example

Appendix K: Release Form Examples for Reference and Screening Checks

Appendix L: Reference Checking Question Examples

Appendix M: Letter of Offer Example

Appendix N: Crossed Responsibilities Contingency Plan Example

APPENDIX A

Job Description Example – Clarington Public Library

Library Clerk Job Description

Job Summary:

Performs a variety of circulation and clerical tasks according to established procedures and service guidelines, providing pleasant and effective circulation service to library users in all areas of Clarington. This is a system wide position and involves work at all branches of Clarington Public Library.

> The Clarington Public Library System strives to provide centers for the residents of Clarington where they have universal access to information services and resources.

Classification: **Library Clerk 1**

Reports To: Circulation Coordinator

Qualifications:

1. Grade 12.
2. Keyboarding - 30 words per minute.
3. Demonstrated interest in library work and public service
4. Demonstrated ability to work with an automated system.
5. Proven ability to learn and perform library routines with accuracy and attention to detail.
6. Demonstrated ability to use a computer terminal and standard office automation software to carry out work routines.
7. Excellent communication skills.

Abilities:

Demonstrated ability to work as a member of a team.

Proven ability to exercise tact and good judgement.

Demonstrated ability to establish and maintain harmonious relations with staff and public.

Able to maintain a mature problem-solving attitude while dealing with interpersonal conflict, personal rejection, hostility or time demands.

Able to withhold actions or speech in the absence of important information; deal with unresolved situations, frequent change, delays or unexpected events.

Able to relate to routine operations in a manner that is consistent with existing solutions to problems, conform to established policies and procedures and log work activities.

Able to start and persist with specific courses of action while exhibiting high motivation.

Able to communicate with others in a warm and helpful manner while building credibility and rapport.

Appendix A (Continued)

Able to take action in solving problems while exhibiting judgement and a realistic understanding of issues, able to use reason, when dealing with emotional topics.

Disclaimer

Because of the changing nature of work and the work to be done, the job specifications may be changed or altered as required.

Job Duties and Responsibilities:

1. Performs public service functions and assists in their organization and control, including:
   - Follows procedures to check library materials in and out.
   - Receives money and makes change.
   - Registers library users.
   - Processing of materials
   - Enters short records for library items.
   - Answers only directional or procedural inquires; refers other information inquires to appropriate staff.
   - Follows procedures for voice notification system.
   - Keeps statistical records
   - Answers the telephone in a polite and business-like manner.
2. Maintains library orderliness, including orderly storage of library materials, with particular responsibility for the circulation desk.
3. Checks library materials and equipment to determine need for repair; may do minor repairs on library materials.
4. Restocks supplies needed at the circulation desk and/or photocopier.
5. Assists in the preparation of outgoing mail.
6. Ensures that incoming and outgoing materials for courier are prepared for delivery.
7. Contributes effort and ideas and supports change that assists the Library to accomplish its Mission and Goals.
8. Cooperates as a team member with library staff in performing any duty essential to the achievement of efficient and effective service to library users.

This job description indicates the general nature and level of work expected. It is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities required by the incumbent. The incumbent may be asked to perform other duties as required.

Revised on: July 17, 2001

APPENDIX B

Job Description Example – Haldimand County Public Library

BRANCH COORDINATOR

Reports to: Deputy CEO

Supervises: Branch Staff

Schedule: Full-time

Qualifications

The following minimum requirements are established for the position of Branch Coordinator:

- Master of Library Science, or Library Techniques Diploma, or equivalent, from an accredited program

- Thorough current knowledge of public library practices and branch library services

- Minimum of three years' relevant public library work experience required

- General knowledge of library policies and procedures

- Ability to manage work and recognize capabilities of employees; allocate resources in an efficient manner

- Familiarity with the Internet and PC technology required

- Knowledge of library service to adults and children

- Ability to deal effectively with staff and the public

- Commitment to excellent customer service

- Commitment to participate in professional development opportunities relevant to this position.

- Leadership skills in a team environment

- Demonstrated knowledge of current trends in technology and libraries

- A valid Ontario Driver's license and access to a vehicle required

Position Summary

Reporting to the Deputy CEO, the Branch Coordinator works as part of a four-person management team to deliver superior library service in Haldimand County. The Branch Coordinator will oversee the efficient day-to-day operations of three branches, and will collaborate with the CEO in the delivery of system-wide adult/children's services, including collection development and programming. The organizational chart provides for two Branch Coordinators, each of whom has responsibility for three branches, and for either adult or children's services system-wide.

Appendix B (Continued)

Specific Duties

- In conjunction with the CEO and Deputy CEO, selecting, supervising, training, scheduling and evaluating Branch Libraries staff

- Setting goals for the branches, evaluating results and recommending changes for continuous improvement

- Ensuring consistent service delivery

- Assisting in the planning and delivery of public services for all residents of the service area, including collection development, readers' advisory and reference

- Planning and developing programs for adults/children system-wide

- Assuming responsibility for the safety and security of staff and patrons

- Developing and maintaining contacts with community organizations and agencies and liaison with Friends groups

- Assisting in the training of staff in service-related skills

- Assuming administrative responsibilities as delegated by the CEO

- Participating in system-wide initiatives

- Other duties as assigned

APPENDIX C

Job Description Example – Pelham Public Library

POSITION DESCRIPTION

Position Title: Public Service Coordinator

Department: Pelham Public Library

Job Class (Town): 1

Library Class: III

Reports to: Library Director

Rate of Pay: $16.42 per hour   **Scale:** 16.42 – 18.25 (Internal Equity)

Hours of work: 18 hours per week

1. Position Objective:

The Public Service Coordinator is responsible for the arrangement and implementation of public library programs and special events for all ages. She/he produces public relations material, liaises with the community and assists as needed with fundraising initiatives/events. The Coordinator also performs regular circulation, information and processing duties.

2. Duties and Responsibilities:

Public Services and Programs
1. Plans programs and events for all ages based on the library's goals and objectives.
2. Locates, contacts and schedules speakers, groups, etc.
3. Responsible for ascertaining program requirements as well as the smooth operation of the program, including set-up and take-down.
4. Designs and produces tickets, posters, library newsletter and press releases
5. Arranges volunteer support and notifies managers of staff support that may be needed
6. Liaises with individuals, community groups, Friends groups, Town departments to arrange events and programs
7. Delivers children's programs for ages 2 and up, may deliver programs for other ages
8. Plans summer programs, supervises grant staff delivering same
9. Assesses program needs and purchases for same within set budget
10. Works with other library staff to coordinate appropriate displays and materials
11. May be required to seek/plan sponsorship or funding opportunities as directed; assists Friends groups with their programs and initiatives

Appendix C (Continued)

Circulation and Information Services

12. Performs circulation functions according to set procedures: check-in and check-out of library material; placing of reserves and notifying patrons; registration of patrons

13. Provides reference, resource and community information in response to queries in person, on-line or by telephone

14. Performs readers' advisory by recommending material for all ages in all formats

15. Accepts payment of fines, fees, bookings and fund-raising charges and processes through the cash register; issues charitable receipts according to guidelines

16. Processes meeting room and equipment rental bookings

17. Assist patrons with the resolution of simple computer problems (hardware and software), the multi-media station, Internet, and photocopier; faxes documents

18. Acts as a resource and referral for other library services such as Interlibrary Loan

19. Follows established procedures for opening and closing the library buildings

20. Courteously conveys library policies and procedures to the public

21. Promotes library services, programs and fund-raising

Other

22. Processes selected library materials; checks in and processes magazines; notifies Assistant Librarian of missing items

23. Establishes and maintains harmonious relations with staff, Library Board, volunteers and public

24. Other duties as required

Equipment use: software packages, photocopier, fax machine, personal computer, cash register, library automated system, alarm function

3. Supervisory Responsibility:

The Public Service Coordinator supervises and directs the workflow of staff pages, grant staff and volunteers.

4. Position Requirements:

1. Education: post-secondary college or university diploma/degree with emphasis on library science, education or public relations background
2. Demonstrated excellent communication and public service skills
3. Demonstrated excellent organizational skills
4. Ability to work as part of service delivery team
5. Must be able to work days, evenings and weekends as part of scheduled hours
6. Prior experience with educational/cultural programming for any public sector desirable
7. Prior experience with public relations/marketing desirable

APPENDIX D

Job Posting Example - Halifax Regional Library

Competition # HRL-02-16

JOB POSTING

Branch Manager 4
Captain William Spry Public Library

Term Full-time Position - July 2 - November 15, 2002

Halifax Regional Library invites INTERNAL and EXTERNAL applications for the term full-time position of Manager of the Captain William Spry Public Library, 10 Kidston Road (Captain William Spry Centre), Halifax, N.S.

Major Responsibilities:

- Under the general direction of the Regional Services Manager, manages the operation and development of the Captain William Spry Public Library to ensure the highest quality service delivery, which includes reader's advisory, reference, programming, computer access and circulation services for youth and adults.

- Plans, implements, promotes and evaluates services for the branch and markets library services through contacts with the community.

- Develops Branch priorities, plans and objectives with the Public Services Management Team.

- Reviews the operation of the branch to ensure the most effective and efficient service delivery and makes recommendations for improvement.

- Responsible for Branch human resources management.

- Plans and implements in-service training and staff development programs for the branch and in conjunction with system-wide training initiatives.

- Manages branch collections. Participates in collection development on a branch and system-wide basis.

- Manages branch budgets.

- Optimizes the use of technology in the delivery of effective library service.

- Manages change effectively.

Application Requirements:

Education:

MLIS degree plus three years professional library experience, one of which has been in a management or supervisory capacity.

(Please state whether the application requirements above are met in your résumé and/or cover letter.)

Appendix D (Continued)

Competencies:

Analytical Skills, Problem Solving and Decision Making Abilities - Must have solution-oriented problem-solving ability.

Communication Skills - High level oral and written communication skills required.

Creativity/Innovation - Skill in generating library use through appropriate response to identified community needs is an essential requirement. Ability to plan, implement and promote library service responsive to community needs. Must have ability to exercise initiative in recommending beneficial service improvements.

Knowledge of Work - Demonstrated ability to work effectively in the development and delivery of library services an asset. Demonstrated ability to be responsible for the operation of a branch library, including collection management and development, an asset. Basic knowledge of Occupational Health & Safety required.

Technological Competence - Familiarity with word processing and other software required. Demonstrated ability to apply technology in the library environment is required.

Flexibility/Adaptability - Must be able to work in an environment of changing priorities.

Interpersonal/Group Skills - Demonstrated ability to work with all library users, community groups and organizations, public and private sector agencies is required.

Leadership - Demonstrated supervisory and administrative skills including:

1. motivating and working effectively with other staff members in a team-based library system;
2. managing change;
3. hiring, appraising, coaching and disciplining staff;
4. administering a collective agreement.

Planning and Organizational Skills - Experience in planning major projects an asset. Must be able to balance conflicting demands.

Respect for Diversity - Demonstrated ability to work with community groups.

Classification: Manager 4

Bi-weekly Salary: $1,668.67 to $1,952.09 (5 steps) [Based on annual salary of $43,552.50 to 50,949.55]

Applications must be received in the Human Resources Office no later than:
Tuesday, March 5, 2002 - 4 p.m.

Cover letters (quoting competition #) and résumés should be addressed to:
Human Resources Manager, Halifax Regional Library, 60 Alderney Drive, Dartmouth, N.S. B2Y 4P8

Please quote: Competition #HRL- 02-16   February 18, 2002

APPENDIX E

Interview Question Examples—Behavioural Questions

These questions are examples only, organized in clusters to show how different aspects of a job performance attribute can be explored. You can use them as idea starters but you should always develop your own questions specific to the job and you should know what a good and bad answer is for each question you use.

Working Independently

Tell us about a time when you had to take the lead and initiate work on a job to get things going. Why did you feel you had to step up? What did you do?

Please describe a situation in which it was important that you pay attention to detail. Why was it important? How did you maintain your focus?

As a leader in a group, tell us about a situation in which you encouraged someone to accept responsibility or take independent action.
What was the result?

Recall a specific example of a time when you overstepped the limits of your job responsibility.
Why did you do it? What happened?

Communication

Think of a specific example of a circumstance in which you practiced active listening. What was the situation? What did you learn?

Think of a case in which you had to convince co-workers to accept your point of view on an issue. Tell us about it.

Please give us a specific example of a situation in your work experience when someone you supervised or a co-worker was not performing his or her job to your satisfaction. What did you do?

Continuous Learning and Change

Tell us about a time when you reviewed your work or your workload and then made changes in the way you accomplish it.
What prompted your reassessment? What did you do?

Please give a specific example of a suggestion or idea for improvement you came up with.
What was it?
How did you propose it? What happened?

We react when others give us feedback. Tell us about an occasion when you used feedback constructively to improve your performance.
What were the circumstances?

Think of a specific example of a time when you successfully led a group through a process of change. How did you start? How did it unfold?

Appendix E (Continued)

Time Management & Priority Setting

Give us a specific example of your ability to deal with competing work priorities.
What was the situation? What did you do?

Please tell us about a specific project you have worked on in which you had to plan the work of other people in addition to your own. How did you go about the planning?
What happened with the project?

Recall a time when you managed several assignments or tasks simultaneously and tell us about the situation and how you handled it.

Teamwork

Think of a specific example of an occasion when you provided some assistance to a co-worker in accomplishing one of his or her personal work objectives. Tell us about it.

Please tell us about an experience where you were working with others and poor cooperation was impeding good results.
How did you deal with it?

Reflect on your experience as a team leader. Give us an example of a time when you successfully led your team to achieve an important and challenging team objective.

Customer Service Perspective

Think of an occasion in your experience dealing with customers when someone became angry about a standard rule or a procedure.
How did you handle it?

Give us an example of a situation in which you provided some coaching for a co-worker whose customer service skills needed improvement. What observation made you decide to be a coach? How did you proceed?

Tell us about a time when you were uncertain about what a customer wanted. Think back over the details. What did you do?

Describe an instance in which a customer came to you with a complaint.
What happened? What did you do?

APPENDIX F

Interview Question Examples—Scenario Questions

Customer Service Perspective. This example for a front-line public service position explores assumptions.

> Three boys of about nine years old have just come into the branch with a covered box and they head for the most secluded table. They are excited, talking and laughing loudly. They pull books off the shelf but seem more interested in giggling over the contents of the box. There are black looks directed at both the boys and at you from adults browsing in the fiction section.
> What would you do?

Decision Making and Problem-Solving. This is a slice of real library life.

> You arrive for work one morning to discover that you are the only person in the library. It opens in half an hour and you have a children's programme starting in 45 minutes.
> What do you do?

Leadership. This simple scenario explores motivation and the parameters on flexibility.

> A Branch Assistant tells you that she is thinking of quitting because she is feeling bored with her job. You value this employee's contribution.
> What do you say and/or do?

Communication and Teamwork. This is a complex question that assesses more than one competency and is not suitable for entry level positions.

> You are picking up dry cleaning and find yourself standing in line with one of the newly elected members of Municipal Council. The library's budget has been submitted to Council but not yet approved. The Councillor knows your position at the library and starts up a conversation expressing the opinion that taxpayers can't afford to provide a free bookstore just for those people who enjoy reading.
> How do you respond? What do you do?

APPENDIX G

Interview Question Sheet Example with Notes

Remind yourself of the performance attribute at the top of each page.

Performance Attribute—Planning and Initiating

Question
Please tell us about a specific project you have worked on in which you had to plan the work of other people in addition to your own.
How did you go about the planning? How did you assess the results?

Write the question out so that you can deliver it in the same way for every

Watch For	Watch Out For
• X	• X
• X	• X
• X	• X

Your crib notes of positive and negative answer components.

Your handwritten notes go here. Leave lots of space. This is why you want each question on a separate sheet.

Two possible scoring systems.

Scoring (Circle One – 0 means response was not relevant to the performance attribute; 5 means excellent evidence of the attribute demonstrated in specific experience.)

| 0 | 1 | 2 | 3 | 4 | 5 |

OR
Scoring:
0 = No demonstration of competency   1 = adequate demonstration   2 = superlative demonstration

APPENDIX H

Interview Question Sheet Example

Performance Attributes:-   1. Communication and   2. Teamwork

Question
You are picking up dry cleaning and find yourself standing in line with one of the newly elected members of municipal council. The library's budget has been submitted to council but not yet approved. The councillor knows your position at the library and starts up a conversation expressing the opinion that taxpayers can't afford to provide a free bookstore just for those people who enjoy reading.
How do you respond? What do you do?

Communication - Watch For	Communication - Watch Out For
• Aware of 2 audiences (councillor & others in line); speaks to both	• Argues aggressively
• Evades gracefully; uses humour	• Evades awkwardly; runs away; refuses to respond at all
• Distinguishes personal statements from library statements but makes a personal opinion response	• Intends to "follow the library policy"
• Expresses empathy with budget challenges of both council and the board	

Teamwork - Watch For	Teamwork - Watch Out For
• Relies on others even when away from the team	• Presents themselves as a library spokesperson
• Explains role of others in library budget process & offers to have someone contact the councillor	• Sees themselves as alone and cornered
• Reports the incident to supervisor and/or CEO	• No follow-up reporting

Scoring (Circle One – 0 means response was not relevant to the performance attribute; 5 means excellent evidence of the attribute demonstrated in specific experience.)

| 0 | 1 | 2 | 3 | 4 | 5 |

APPENDIX I

Interview Checklist Example

Pre-Interview Contacts

Appointments arranged by telephone by someone other than the interviewer if possible. Information sent by mail, fax or e-mail attachment to arrive well before the interview.

- ☐ Confirmation of date, time and place for interview
- ☐ Copy of job description for job applied for
- ☐ Copy of library's mission / vision / values / goals
- ☐ Copy of library's long-range plan
- ☐ Copy of library's organization chart
- ☐ Map and parking directions for candidates outside the community
- ☐ Request that candidate bring names of references that may be contacted
- ☐ Request that candidate bring copies of work samples, if applicable. Confirm understanding of whether or not they will be returned to the candidate at the end of the process

Interview Introduction

- ☐ Formal introduction to CEO and all interviewers. Explain their positions in relation to the job applied for.
- ☐ Fresh glass of water poured for candidate
- ☐ Brief explanation of the job vacancy and how the job fits in the overall library organization
- ☐ Explain that all interviewees will be asked the same questions
- ☐ Explain that note taking is necessary and that candidate should try not to be distracted by it
- ☐ Explain the need for details and specifics in examples used in answers

Interview Closure

- ☐ Get a copy of the list of references and confirm permission to contact them
- ☐ Get a copy of any work samples requested in advance or offered by the candidate
- ☐ Explain next steps in process and expected decision date in very general terms
- ☐ Say "Thank you" and walk your guest out

Interview Follow-Up

- ☐ Contacted to advise of further steps in process
- ☐ References checked by _____
- ☐ Contacted to advise that they were not the successful candidate by _____
- ☐ Offered the job by _____

APPENDIX J

Employee Reference Permission Form Example

Wentworth Libraries

Release of Employment Information

The *Municipal Freedom of Information and Protection of Privacy Act* allows an Employer to release only very limited information to those checking references unless you have provided written permission for the Employer to respond to inquiries.
Please choose an option and provide a signed copy of this form to the Administration Office if you expect to use the name of any staff member of the Library as a reference in the future.

Option 1
I authorize Wentworth Libraries to release information about my employment with the Library that is limited to my job title, general responsibilities and salary range. (This Option is what is possible under the legislation without any broader written permission.)

_____   _____
Signature   Date

Option 2
I authorize Wentworth Libraries to release information about my employment with the Library including job responsibilities and performance assessment judgements but only to those persons I provide written permission for in advance.

_____   _____
Signature   Date

Option 3
I authorize Wentworth Libraries to release information about my employment with the Library, including job responsibilities and performance assessment judgements, to any potential employer or other person to whom I have given the name of a Wentworth Library staff member as a reference for a period of seven years from the date on this form.

_____   _____
Signature   Date

APPENDIX K

Release Form Examples for Reference and Screening Checks

Permission for Reference Checking

I, [_____candidate name_____], authorize [_____library name_____] to contact the references

whose names I have provided to solicit information about me in connection with my application

for the job of [_____job title_____].

I authorize the referees I have named to provide information and to release information about

my employment with the organizations they represent, including job responsibilities and

performance assessment judgements.

_____   _____
              Signature   *Date*

_____

Verification Statement

I, [_____candidate name_____], certify that all information provided by me in documents in support

of my application for the job of [_____job title_____] is true.

I understand that providing false information is grounds for disqualification from the application

process or, if discovered after hiring, is grounds for immediate dismissal.

_____   _____
              Signature   *Date*

APPENDIX L

Reference Checking Question Examples

Can you confirm that [candidate name] was employed by you between [date] and [date] as a [job title]?

Was your relationship with [candidate name] one of supervisor/supervisee or co-worker? Who did [candidate name] report to if it was someone other than you?

(Confirm other details as appropriate.)

Ask questions to clear up any red flag concerns.

(Prepare these carefully in advance so that you can be tactful and use neutral language but target your concern effectively.)

We talked with [candidate name] about a specific project [responsibility, skill]. What role did [candidate name] have in that work?

Our job requires someone who can [insert job performance attribute]. Thinking back, can you recall a specific example of a time when you observed that kind of behaviour in [candidate name]?

(Use this kind of behavioural question for several performance attributes but reword it and mix up the order to add some variety.)

Our job could involve a situation like the following [insert scenario]. How do you think [candidate name] would handle that?

(Use such a variation of a scenario question only if you cannot think of any other way to get at what you want to know effectively. References may refuse to answer hypothetical questions.)

No one is perfect. What are [candidate name]'s weaknesses as an employee?

If circumstances changed in your organization and you had an appropriate job vacancy, would you hire [candidate name] again?

APPENDIX M

Letter of Offer Example

TRILLIUM PUBLIC LIBRARY

Dear Ms. Lazuli:

I am pleased to write to you to confirm a job offer made to you earlier today by telephone for part-time employment in the position of Public Service Clerk at the library's main branch. The appointment start date is scheduled as Monday, June 2, 2003 at 1:00 p.m.

As we discussed, this is a part-time position at the Library Clerk classification level and your starting rate of pay will be $##.## per hour. Enclosed are copies of the job description for the position and the Library's Personnel Manual, which outlines the terms of this employment offer in more detail, including policy on vacation, leave, benefits and payment of wages.

Your work will be under the supervision and scheduling of the Library Assistant, Amethyst Sand, who will provide you with an initial training period. Your regular hours of work will average 28 per week, according to a schedule that may vary from week to week. This job is primarily based at the main branch but work may be assigned at any location of the library system. In accordance with the policy of the Library Board, your appointment will be of a probationary status for a three-month period from date of commencement.

May I have your written acceptance of this employment offer at your earliest convenience? I am forwarding two copies of this letter; one to be signed and returned to my attention. Please do not hesitate to contact me if you have any questions.

Welcome to our staff. We look forward to having you work with us to accomplish the Library's mission and service goals.

Sincerely,

Beryl Stone,
Chief Executive Officer
Trillium Public Library Board

_____

I accept this job offer under the terms outlined above.

_____   _____
            Signature   *Date*

APPENDIX N

Crossed Responsibilities Contingency Plan Example

Crossed Responsibilities for Task Coverage during Staff Absences

		Short Term (1 to 3 Days)	**Medium Term** (4 to 15 Days)	**Long Term** (More Than 3 Weeks)
CHRIS				
	• Prepare materials for courier delivery	Terry	Terry	Terry
	• Sort incoming courier deliveries	Jan or Alex	Jan	Jan
	• Restock desk supplies	All	All	Alex
	•			
JAN				
	• ILL requests	Alex	Alex	Alex
	• Compile statistics	Terry	Terry	Dana
	•			
TERRY				
	• Collect, open & distribute incoming mail	Alex or Chris	Alex	Alex
	• Deposit revenues at bank	Chris	Chris	Dana
	•			
ALEX				
	• Process overdues reports & prepare notices	Jan	Jan	Jan
	•			