

## Developing an Orientation and Mentoring Program

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**Conference Program Abstract:** Do you want to make new librarians feel welcome and give them a solid orientation to your library? Attend this session and hear how the University of Tennessee at Chattanooga's Lupton Library developed a program to orient and mentor new librarians. This session will explore the development of a library-wide orientation plan and a subsequent mentoring program for three new librarians.

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### Orientation Introduction

by **Bill Prince**

I coordinated the orientation program at the University of Tennessee at Chattanooga's Lupton Library and will begin our discussion by covering the orientation program from the perspective of a current librarian. Toni Carter will then speak about her orientation experience as a new Reference/Instruction librarian. Next, Priscilla Seaman, Library Instruction Coordinator, will review the development of the mentoring program. Beverly Simmons, a new reference/instruction librarian, will then talk about the mentoring program as a participant. Finally, Jason Griffey, also a new reference/instruction librarian, will provide the wrap-up for our orientation and mentoring programs.

For years our traditional new librarian orientation program lasted a week to a week and a half. It included one- to two-hour meetings with library department heads. Sometimes two meetings were held in one day, one in the morning and one in the afternoon. This was followed by an introduction and orientation to our reference and instruction responsibilities. The traditional orientation lasted several hours over the course of two or three days and was followed by a request for the new librarian to read the

*Reference Manual of Policy and Procedure*. If new librarians had questions, the individual was encouraged to seek assistance from the more experienced librarians.

This approach resulted in complaints from the library departments of "too much information in too short a time," as well as too little guidance within the Reference and Instruction Services Department. We needed to restructure the program in order to provide incoming librarians with a meaningful orientation and mentoring program that would successfully integrate them into the library and provide them with a solid foundation for their positions.

A literature review provided some guidance about orientation programs (see [Resource](#) list below). However, with the transition from print to electronic resources and the introduction of new technologies such as virtual reference, we needed to develop a fresh approach. The program came together through discussions at many Reference and Instruction departmental meetings. We then discussed the non-reference library orientation portion at two library-wide faculty meetings. This discussion resulted in buy-in and involvement from the entire library faculty.

This resulted in new criteria and approaches for our program, with the goal of always keeping the end user in mind. We were able to achieve this goal by introducing new librarians to the most frequently used reference materials rather than trying to cover the entire reference collection.

Also, databases were reviewed based on curriculum needs as well as the current and anticipated use of the resources by our patrons. The orientation was expanded to over seven weeks to make it less overwhelming, and we adopted a generic flexible orientation schedule to fit the needs of the new librarian and the librarians providing orientation.

The overall purpose of the orientation program was to introduce new librarians to other library personnel, provide an overview of the library departments, and review reference and instruction services. New librarians participated in departmental orientations and a library overview with the Dean of the Library. Reference and instruction orientation required a more in depth overview of selected databases, frequently used print resources, reference collection development, library instruction and other responsibilities. In addition, non-scheduled time was spent at the reference

desk with a seasoned reference librarian, and the new librarians observed library instruction classes. In her portion of this paper, Toni Carter will detail the orientation schedule that was developed.

Upon completion of the orientation, we sought feedback from those who provided the orientation. Overall, the program was well received. The department heads appreciated the flexibility of being able to determine the time frame for their presentations. There were occasions, however, when schedules conflicted with planned meetings or events. This made it difficult to reschedule missed sessions. Despite these limitations, the goals, process, and content of this new librarian orientation could be easily modified and adapted to accommodate individual settings within the public and technical service areas of a public, school or academic library.

## **Orientation as a New Librarian**

**by Toni Carter**

Anxiety and nervousness often accompany the start of a new job. However, on my first day at Lupton Library, the department head handed the orientation schedule to me, and I immediately felt a sense of purpose and structure. The anxiety and nervousness faded quickly. The schedule provided me with my own duties when the other librarians hurried to meetings, to teach classes, and to work at the reference desk. I felt part of the group from the beginning, with no need to guess at what others expected of me.

Two reference/instruction librarians besides myself took part in the initial program. Since then, two circulation supervisors and our new reference/instruction department head have taken part. This description and evaluation of the program will be from my perspective as a new reference/instruction librarian.

I began work in August of 2005, allowing me to participate in a three-day campus-wide orientation for new faculty one week prior to beginning the library orientation. This campus-wide orientation covered personnel issues such as healthcare and retirement plans, as well as the ever important e-mail passwords and parking decals. These two orientations, the campus-wide and the library's, dovetailed nicely.

Week one began with an overview of the orientation schedule, several meetings with the Library Instruction Coordinator, an introduction to the library website, an explanation of the collection of library statistics, and a review of collection development duties. I received a copy of the *Reference Policy Manual* to read.

Week two included more meetings with the Library Instruction Coordinator, covering such topics as goals for the freshman program, information on student assistants, and an introduction to "Project Handouts" (Pathfinders).

Weeks three through seven included working the reference desk as backup, reviewing databases and reference print sources, and sitting in on library instruction classes.

Working backup at the reference desk took pressure off being on the desk alone at first, and it phased me in to working the desk independently. It also allowed me to observe each librarian's style in answering reference questions.

During the library database orientation, we covered only the frequently used databases and the multi-subject databases. Those who assisted in my training made a special effort to review the various interfaces used by different vendors. The review of print sources was divided among the librarians by collection development duties. For example, the librarian responsible for collection development in the sciences would highlight the important sources in this subject, the person who purchased items for business would review the business collection, and so on.

Time was also set aside each week for an introduction to the numerous departments in the library. Each department was allotted five hours and assigned a specific week. These departments included Cataloging, Acquisitions, Circulation, Systems, Special Collections, and Administration. Some met with me for the entire five hours; others only needed a couple of hours. The Administration department (Dean and Dean's assistant) spent all five hours with me. They reviewed annual and sick leave, conference travel, library committees, and the library's organizational structure. On two of the days we went out for coffee and lunch. This gave me the opportunity to socialize in a more relaxed atmosphere with my new colleagues.

Flexibility is the key to this orientation program. My previous job was in a special collections environment, so orientation was important to me,

especially with the databases. The two other reference/instruction librarians, however, already had some academic library experience and were familiar with the databases. As mentioned earlier, two of the circulation employees and our new reference/instruction department head also completed the program. They needed review of some of the same materials I did, but also required a more specialized schedule reflecting their individual duties. When I requested feedback from others who had completed their orientation, one person suggested spending a day or two shadowing the department heads. Because of the flexibility of the outline, this element could easily be added in the future.

Despite the extension of the program from one to seven weeks, the possibility of information overload still exists. When our expert on law sources introduced me to the sources available in the library for this subject, I was a bit overwhelmed. He modified his introduction for our new reference/instruction department head, limiting his review to electronic sources and saving print sources for a later time. By focusing even more on the most used sources, he helped reduce information overload. This again illustrates the flexibility of the program.

A final point that I would like to highlight involves the inclusion of the entire library in the orientation of new faculty and staff. When I met with the circulation department for orientation, all of the faculty and staff members explained their duties. This was quite educational and allowed me to quickly meet and connect with faculty and staff. By the end of the orientation, I knew everyone in the library, and felt a strong sense of collegiality.

Without this program, it would have taken me much longer to integrate myself into the culture and workflow of Lupton Library. Because of the orientation, I feel like a valued employee.

## **Why and How?**

**by Priscilla Seaman**

### **Why did we implement a mentoring program?**

1. The library faculty had discussed the idea of a mentoring program during the previous year, and we knew that we would have three new

guinea pigs (Beverly, Jason, and Toni) on whom to test such a program.

2. We had heard of a successful, campus-wide mentoring program in which new faculty members were paired with more senior faculty members to ease the transition to university life.
3. The mentoring program would complement the orientation program. However, the mentoring program would be less job-focused and task-focused, giving the new librarians a chance to learn about the cultural climate of the library, university, and the tenure process in academia.
4. We found that in previous years, much myth and mystery surrounded the tenure process. New librarians received mixed messages or were unclear about the following aspects of tenure: what the requirements are to attain tenure, how you get published, what level of professional organizational involvement is expected, how much presentations count, etc. New librarians wanted to know whether they were truly in an environment of publish or perish, sink or swim, eat or be eaten.

## **How did we plan and implement the mentoring program?**

We began by creating a committee. I was on the committee, along with the Dean, and two other librarians.

Our first project was to determine if we wanted to pursue a mentoring program—would it be useful and valuable to our new librarians and to our institution? To this end, we conducted a literature review, and while we discovered a few drawbacks to implementing a mentoring program, most of the literature supported mentoring programs.

Among the drawbacks, one article stated, “Mentoring, conscientiously practiced, is a demanding, even daunting enterprise” ([Slattery and Walker](#) 1999). Another article defined the responsibility of a mentor in the following terms: sponsor, role model, guide, coach, advisor, teacher, trainer, nurturer, and protector.

Among the positive comments on mentoring: “For the academic library that hopes to develop and retain the best librarians, the well designed and carefully managed mentoring program is pivotal” ([Slattery and Walker](#) 1999). Another positive comment from the same source: “Leadership must come, not from library administration, but from the senior librarians on

whom the responsibility falls of assisting in the development of younger librarians....”

Therefore, we decided to give it a try in a one year pilot program. Then, at the end of the first year, we would evaluate the program, survey the participants, and decide whether the mentoring program was a useful and meaningful endeavor, and something that should be continued in following years.

Before initiating the program, we answered the following questions:

1. Do we involve the greater university? In other words, do we match new librarians with a mentor from the teaching faculty?
  - We chose to keep the program within the library in order to keep the program manageable and to avoid the long process of university approval for such a program.
2. Do we have only senior tenured faculty serving as mentors?
  - In our case, no, because at this time, we have more untenured librarians than tenured librarians.
3. Would we require all library faculty to participate?
  - No. Instead we called for volunteers because we felt that volunteers would be more likely to be interested and engaged in participating.
4. How would we match the new librarians with their mentor?
  - We matched individuals to be mentored with mentors outside of their immediate departments. Second, we tried to match compatible personalities/complementary interests. Most importantly we provided an “out” for mismatched relationships—if any individual in a mentoring pair felt mismatched, s/he could confidentially approach the Dean and asked to be reassigned. Fortunately, no one needed that option.

Once mentors and new librarians were paired, the committee provided both the mentors and new librarians with guidelines for the program which outlined aspects of the program, such as characteristics and responsibilities of both parties. Also, we provided all participants with an annotated bibliography of the literature that we had reviewed. Outside of those guidelines, each pair had great flexibility in setting up their own mentoring method and style of communication.

## Mentoring from the Participant's Perspective

by Beverly Simmons

As Priscilla Seaman mentioned, each new librarian was paired with a mentor from a department other than the Reference and Instruction Department. This gave each of us someone to talk with who shared a slightly different viewpoint than those with whom we worked closely each day.

I was matched up with our head of cataloging and records maintenance, Valarie Adams. At the beginning of our mentoring relationship, Valarie asked me what I hoped to gain from the process. I told her that I hoped for

- Someone to talk to about work issues or problems;
- Someone to nudge me in the right direction when needed;
- Someone to fill me in on the history of situations or issues;
- Someone to ask for advice;
- A good working relationship and friendship with a librarian outside of my immediate work group.

### Mentoring - Phase I

For most of the first semester we met once a week for an hour. We met in Valarie's office or occasionally went to the University Center for coffee. Initially, Valarie planned training sessions on various functions of the library and about her department and all the processes they handle. She also discussed committee work both for the library and the university at large. She helped me understand what the various committees do and what kinds of time commitments each involve. However, she always gave me time to ask questions about anything and let me steer the conversation in any direction I felt I needed that day. For my part, one of the advantages of having a regular mentor meeting scheduled was that if I had a question during the week, and the issue was not urgent, I could jot the question down and know that I had a time scheduled later that week when I could get answers.

### Mentoring - Phase II

Toward the end of the first semester, we met for an hour every other week. By this time many of my initial "new job" questions had been addressed

and I found that I had fewer questions jotted down to bring to our meetings. However, these meetings gave me a chance to step back from the job details and take a broader look at the work I was doing. It became a more reflective time when I could consider the larger job picture. As I began to understand more about the position, I was able to use my mentor more as a sounding board for ideas.

### **Mentoring - Phase III**

Recently we decided to meet for our mentoring session for lunch only once a month. Having experienced both in-office meetings and off-site meetings, I found that mentoring sessions held outside of the office were more productive for me. Because it feels less like a formal meeting, I am more at liberty to ask questions and bounce around ideas.

### **Three mentors, three different approaches**

We currently have three new reference librarians paired with mentors. Toni is being mentored by Chris Ryan, Electronic Resources Librarian. Jason was paired up with Mike Bell, Associate Dean and Head of Library Acquisitions and Collection Department. I polled the members of each pair, and found that each mentoring relationship was handled differently.

Jason and Toni do not meet as regularly or frequently with their mentors as I do with mine. Mike Bell scheduled a couple of formal meetings with Jason to discuss a list of topics about job specifics and about the expectations of a new faculty member and what it takes to make it successfully through the first year. After these initial sessions, both Jason and Mike felt additional formal sessions proved unnecessary. Mike now makes himself available to Jason as needed. He mentioned that they have had several sit down discussions they might not have had without the mentoring relationship.

In yet another pattern, Toni's mentoring relationship with Chris involves regular monthly meetings. They go to lunch and discuss anything Toni wants to know. Toni feels that this has been really helpful in giving her a sense of people, personalities, and the history of issues facing the Library.

### **Benefits of a mentoring relationship**

One of the benefits of a mentoring relationship is having someone who knows you and is willing to make suggestions. My mentor has made a

couple of suggestions about how to handle situations and about volunteering for committee work. These suggestions have been quite valuable to me.

All of the new librarians experienced the following benefits from the mentoring relationship:

- We've made a personal connection with another professional in our library;
- We've had someone to explain the intricacies of the tenure process and what we should be doing in our first year;
- We've learned a lot in a short period of time about the culture of the university and the library;
- We all have someone who knows us well enough to make suggestions.

Overall, having a mentor has helped each of us integrate more quickly into the professional life of the library and the university.

## **Recommendations**

- Based on our collective experience, we find that it is important to be flexible when designing a mentoring process for your library. Flexibility allows people to move through the process in the way that best suits their work styles and personalities.
- Ideally, mentors should be from a different work group than the individuals they mentor.
- In an academic setting, if possible, mentors should have successfully completed the tenure process.

## **Presentation: Orientation and Mentoring wrap up @TLA**

**by Jason Griffey**

As a part of our presentation at TLA/SELA, we decided to poll the audience for things they wish they'd known when they started at a library. The results, listed below, were humorous and enlightening:

- More about the branch system at the beginning of my career, as well as a detailed walk-thru of the central locale and how all parts work together.

- The process for promotion, the true political outlook of the library, and how politics affect the library.
- When conferences fill up (ie: LOEX) and to get there early for workshops at ACRL.
- What committees to join as a new librarian, what is expected of a faculty member, what responsibilities are, going through the tenure process.
- Where to get office supplies, appointment on university committees.
- To keep a professional portfolio.
- How the organization functions.
- Not to be shy, and talk to everyone inside and outside the library.
- Acronyms specific to libraries and universities.
- More about tenure and promotion requirements.
- Orientation to the local community.
- How to use the telephone!

Our findings show that the important aspects of orientation can range from long-term issues (tenure, promotion, professional portfolios) to the very short term (how does the library phone system work). They also illustrate the difficulty in producing a one-size-fits-all orientation program, the importance of flexibility, and listening to new librarians for feedback.

## **Summary of findings**

### **Orientation**

- Keep orientation focused on material that patrons use on a daily/weekly basis. Don't try to cover your collection comprehensively.
- Create a skeleton schedule that allows flexibility for individuals conducting orientation sessions and new librarians participating in orientation to flesh out their schedules according to their experience and needs.
- Use specialists for each area -- the Head of Circulation should orient to circulation, for instance. This does two things: it allows the new librarian to get the correct information, and more importantly it lets them know who the expert is for future questions.

### **Mentoring**

- Avoid going too big with the program initially --keep it "in house."

- In an academic library, use tenured mentors where possible.
- Use volunteers...don't force a mentoring relationship.
- Pair mentors and new librarians by interests, not by department or position.

For more information, please visit our website:  
<http://www.lib.utc.edu/tla2006/jgriffey/>

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## Appendix One

### Sample Library Orientation Schedule

The following sample orientation schedule highlights the way in which a week's activities could be organized. The actual schedules will vary depending on the new librarian's orientation needs as well as the obligations of those providing the orientation. Changes in the schedule should be worked out between the new librarian and the librarian providing the individual session. The schedule for the new librarian should be determined by his/ her previous background and experience. Also, department heads can work with the new librarian to select times for the departmental orientations.

This orientation schedule does not take into account orientation to various library committees that impact Reference/Instruction services. Also, there will be a mentoring component which will commence later.

### Departmental orientation: Reference and Instruction

The following areas will be covered by various reference/instruction librarians on a daily basis. In addition, new librarians will also observe library instruction classes, assist with reference desk duty, organize their offices and generally become acclimated to the library and university.

Individual	Topic	Day/Time
Bill	Overview, tour, introductions	Monday, 10 am
Priscilla	Library Instruction	Monday, 4 pm

Priscilla	Library Instruction	Tuesday, 10 am
Priscilla	Library Instruction	Wednesday, 10 am
Jason	Project Handouts	Thursday, 10 am
Priscilla	Library Instruction	Thursday, 2 pm
Beverly	Filing	Friday, 10 am

## Database Orientation

The following reference librarians will spend approximately one hour demonstrating and answering questions about the databases. The most frequently used databases from different vendors have been selected for review.

Individual	Database	Vendor	Date/Time
Sarla	OmniFile Full Text Mega Edition Issues and Controversies	Wilson Web Facts on File	Tues, 4 pm
Sarla	Oxford Reference Online Premium Xreferplus Reference Books	Oxford U. Press Xreferplus	Wed, 4 pm
Jason	ARTstor	ARTstor	Fri, 4 pm

## Print Resource Orientation

Reference librarians will introduce the new librarian to the most important commonly used print reference books in various subject areas.

Individual	Ref Print Area	Print Subject Area	Date/Time
Beverly	A	General	Wed, 9 am
Bill	H	Business	Thurs, 9 am
Bill	K	Law	Fri, 9 am
Toni/Jason	QE, G	Geology/Geography	Fri, 4 pm

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