#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Acquisitions Specialist

**Job Number:** L-061 | VIP: 1407

**Band:** OPSEU- 9

**NOC:** 1311

**Department:** Library & Archives

**Supervisor Title:** Schoarly Resources Librarian

**Last Reviewed:**  June 22, 2022

#### **Job Purpose:**

Under the direction of the Scholarly Resources Librarian, the incumbent is responsible for managing the library’s acquisitions budget and overseeing the acquisitions processes for physical and electronic materials and collections. Other duties include assisting with metadata management for newly acquired materials, providing information and fulfillment services at the Library Services Desk, and indirect supervision of student employees. Shares responsibility for covering service points during all operating hours including evenings and weekends.

#### Key Activities:

##### Finance

* Within the Library Services Platform (LSP), manages and monitors a variety funds of over $2m annually with the goal of committing collections funds in the most efficient and timely manner to meet the needs of the academic community.
* Using the LSP, oversees the library’s acquisitions payment activities by verifying and processing invoices for all library materials.
* Primary acquisitions contact with the University’s Financial Services Office (FSO), processing invoices with attention to FSO requirements, accounting for foreign exchange rates, HST (Harmonized Sales Tax) rebates, and vendor policies.
* Reconciles monthly and annual acquisitions reports with the University’s Financial Services Office statements.
* Primary contact for acquisitions payments and deposit accounts including those related to electronic scholarly resources acquired through federal and provincial licensing bodies, Canadian Research Knowledge Network (CRKN) and Ontario Council of University Libraries (OCUL).
* Posts monthly rates of exchange for use within the Library & Archives.
* Verifies documentation, compiles, and approves logs of library acquisitions expenditures for library credit card holders.
* Analyses annual acquisitions budgets and forecasts changes based on rates of exchange, vendor contracts, and new or cancelled scholarly resources.
* For time sensitive opportunities, provides advice to librarian on collections funds availability and implements decisions ensuring that expenditures are made as required.
* Coordinates timely and accurate budget rollover and closing of the fiscal year.
* Processes invoices up to $75,000 without prior authorization.
* Reconciles daily transactions for point of sale and TrentU cards, entering data on daily transaction logs.

##### Acquisitions

* Under the direction of the Scholarly Resources Librarian, coordinates acquisitions for library materials in all formats.
* In collaboration with librarians and under the direction of the Scholarly Resources Librarian, develops, recommends, and implements improvements to infrastructure in the Library Services Platform (LSP) and coordinates workflows for acquisitions processes.
* Ensures acquisitions processes are understood by stakeholders.
* Upon request by the Scholarly Resources Librarian, the University Librarian or their designate, provides forecasts for annual acquisitions budget and regular updates on status of the acquisitions budget. Answers inquiries on budgets as requested.
* Collaborates with Library Systems personnel to build and improve reports for collection development and financial reporting.
* Collaborates and communicates with Metadata, Electronic Portfolios, and Physical Processing staff to ensure processing tasks are created as needed to ensure seamless interdepartmental workflow.
* Creates and updates acquisitions documentation.
* Trains staff in acquisitions procedures.
* Processes acquisitions purchase requests, including identifying suppliers, researching format, availability, and pricing, and completing purchases.
* Ensures that materials ordered through acquisitions meet guidelines for preferred formats and editions in keeping with collection policies.
* Accesses and uses vendor platforms and corresponds with external vendors regarding invoices, payments, credits, and other business.
* Remains current with library acquisitions technology and trends, including vendors, electronic resources, video streaming, and access models through active participation in communities of practice.
* Assists Scholarly Resources Librarian with communications, marketing, and outreach for library acquisitions.

##### Metadata Management

* Ensures that materials are catalogued according to standards established in the AACR2/RDA, using Library of Congress Subject Headings and Library of Congress Classification numbers where appropriate.
* Prepares and loads batches of bibliographic records into the LSP according to Library guidelines.
* In consultation with a librarian, adapts and revises bibliographic import profiles and normalization routines for loading bibliographic records.
* Identifies problems and deficiencies with vendor bibliographic records based on library standards and corrects or refers for correction according to Library guidelines.
* Identifies records that require upgrading to the Discovery & Systems Librarian, including those requiring original subject cataloguing and classification.
* Ensures records contributed to the consortial catalogue meet consortial standards.
* Loads and upgrades records in the institution catalogue using records from the consortial catalogue and vendor databases such as OCLC.
* Keeps abreast of changes in cataloguing practices
* In consultation with Systems Librarian, revises and updates local documentation of cataloguing and classification procedures.

##### Electronic Portfolios

* Activates newly acquired individual titles in existing electronic collections.
* With the assistance of a librarian, coordinates activation of electronic collections.
* With a librarian, ensures that portfolios for electronic resources not found in community or consortial electronic collections are available on a timely basis with attention to the needs of the academic community and in accordance with Library guidelines.
* Tests access for newly acquired titles and assigns testing as needed.
* Identifies and resolves or escalates issues with electronic collections and electronic portfolios.
* Supplements electronic portfolio records with DRM and license limitations.

##### Library Service Desk

* Triages incoming questions in person, via telephone, and online/via email. Responds to Library Services questions and general information requests in a professional and timely manner, and redirects all other requests and questions as appropriate.
* Provides general reference services to assist patrons in clarifying and interpreting their information needs and recommending appropriate materials and sources to meet users’ needs.
* Instructs patrons in the use of the library’s discovery system, databases, and other electronic tools.
* Provides effective front-line customer service, resolving or escalating patron concerns and troubleshooting issues with library technology such as the library discovery system, online databases, and room booking systems.
* Performs the complete range of circulation duties including loans, returns, holds, transits, digitization, bookings, and fines and fees processing.
* Assists with processing of physical items for course reserves.
* Assists patrons with use of microfilm and microfiche readers.
* Registers exempt patrons and external borrowers within the Library Services Platform (LSP), and issues library cards as appropriate.
* Understands, communicates, and enforces library policies and procedures.
* Performs all opening and closing procedures at the service desk.
* In the event of an emergency, follows emergency protocols. Acts as and maintains training as a fire warden for Bata Library and acts as primary contact for matters related to security and emergency services during evening and weekend shifts.
* Records statistics related to inquiries and patron numbers.
* Provides general library support as needed, including shelving, searching for, retrieving, and processing library materials, processing incoming and outgoing mail including resource sharing materials, and locks and unlocks main library doors.
* Under the direction of the unit manager, creates and posts social media content for the Library Services unit across multiple social media channels.

##### Human Resources

* Following priorities outlined by direct student assistant supervisors, briefs, directs, and supervises Library Services student assistants when working on the Library Service desk.
* Assists direct student assistant supervisors with ongoing training of Library Services student assistants working at the Library Service desk.
* In the absence of Library Services Desk & Fulfillment Coordinator and the Resource Sharing Coordinator, assists with modifying Library Services student assistants’ schedules as needed.
* Shares regular feedback on Library Services student assistants’ performance with their direct supervisor.

##### Other

* Contributes to Library & Archives special projects as required.
* Facilitates learning related to information services in both formal and informal sessions.
* Sits on Library & Archives committees as needed and with the approval of the unit librarian.
* Performs other duties as assigned by the unit librarian.

#### Education Required:

* An undergraduate university degree (4 year) required ***and***  
  a Library & Information Technician Diploma (2 year) or an acceptable equivalent combination of education and experience.

#### Experience/Qualifications Required:

* Minimum of seven (7) years of experience in libraries (academic libraries preferred), showing progressive experience in acquisitions, electronic resource management, and/or cataloguing,
* Minimum of three (3) years of experience managing a substantial budget, preferably within an academic library setting.
* Minimum of three (3) years of experience working with Integrated Library Systems (ILS) or Library Services Platforms (LSP), including modules for acquisitions and/or cataloguing, and developing or working with system-generated reports.
* Experience with cataloguing print and electronic resources and familiarity with Library of Congress cataloguing standards.
* Considerable experience with spreadsheet and database software applications, and comfortable learning and using new technologies and applications.
* Demonstrated knowledge and understanding of academic publishing industry and trends.
* Proven ability to produce quality work with a high degree of accuracy, while managing multiple and completing priorities and deadlines.
* Ability to work both independently and as part of a team, with awareness of when to take initiative and when to consult with others.
* Evidence of superior service orientation exhibited through excellent interpersonal skills and creative approaches to problem resolution.
* Demonstrated tact and diplomacy, and a strong commitment to the promotion of positive public relations amongst users and staff.
* Excellent verbal and written communication skills
* Demonstrated analytical ability, initiative, organization and problem-solving skills, and a commitment to continuous improvement.
* Good judgment and ability to make decisions independently.
* Able to commit to and be flexible in work schedule, including working daytime, evenings and weekends.
* Physical ability to lift books and boxes, maneuver loaded book trucks, and lift and carry up to 15 kilograms.
* Experience with Alma is an asset.
* First Aid certification is an asset.

#### Supervision:

* Indirectly supervises and directs the activities of student employees working at the Bata Library Service desk.

**Job Evaluation Factors:**

##### Analytical Reasoning

Work requires analytical reasoning to choose the most appropriate course of action from among a variety of possible methods, processes and solutions within limits defined by standard and established practice. (3)

Example:

* Acquisitions:
  1. Daily work involves fulfilling purchase requests for a variety of library materials. This requires analyzing information on availability, format, price, access options, and exchange rates of material from multiple sources to determine the best options that meets library guidelines for preferred formats and editions. For example, to purchase a German video, attention must be paid to finding the correct title, choosing the language of the video (German or English dubbed), options for subtitles (English or German), licensing and technical requirements for viewing in Canada, and format such as streaming or DVD for local use. Analysis is also required to determining where the funds for purchase will come from, including reviewing terms of reference and available dollar amounts for each fund to determine if any can be used for the purchase, or if the purchase will be made from the acquisitions budget.
  2. Develops and documents workflows to be used by others supporting acquisitions by analyzing library and finance tracking requirements and library management system (LMS) functionality, to determine the appropriate steps.
* Finance:
  1. Monitors, predicts, and provides feedback on the Acquisitions budget by creating and running system reports. Advises librarians on the status of specific funds.
* Metadata:
  1. Cataloguing decisions: choosing a record that accurately reflects the item Trent has in the collection with evolving standards and adhering to changing documentation. There are often many choices, and the incumbent must recognize the best fit for Trent, using knowledge of international cataloguing rules.
* E-Portfolios
  1. Work involves searching for existing items in databases, ensuring that all data matches precisely, and linking them. If data does not match, activating new portfolios, editing existing portfolios, or creating new portfolios.
* Service Desk:
  1. At times is the only staff member in the library (evenings/weekends) and may have to analyze a wide range of information when alone and adapt based on the situation to determine appropriate actions. This can include emergency situations.
  2. Working with numerous systems, staff generally attempt to follow documentation. However, in some circumstances a discovery and exploration-based approach is needed.
  3. When there’s a problem with access to material, staff discuss possible solutions with the patron. “This link appears to be broken; I will report the problem to our library systems staff,” or “This database is providing only the citation; to obtain the full text you will need to use our interlibrary loan system; can I show you how to do that?” or “This provider of this e-book only allows one person at a time to access the e-book. You will have to wait to access it, or we can look for other ways to access this book.”
  4. Staff must quickly figure out and adapt to the user’s communication abilities and preferences. For example, for every interaction staff need to be asking themselves: Is English this person’s second language? How many seconds of silence do they need before they start speaking? What level of technical knowledge do they possess? Are they hard of hearing? Are there any background psychological factors impacting the communication, such as anxiety, stress, cultural or personal issues normally dealt with at Student Accessibility Services or other support services?

##### Decision Making

Decisions are standardized but somewhat varied and adaptation is required. The employee receives occasional supervision in carrying out tasks that call for decisions beyond the scope of standard practice. Decisions usually involve determining the best process to carry out the job tasks.

Examples:

* Finance
  + Selecting the best fund for acquisitions, based on fund criteria, cost, and fund balance.
* Acquisitions
  + When new systems or pricing structures are introduced, the incumbent decides if and how they can be implemented within the acquisitions system. For example, pricing for a large video package recently changed from an automatic 1-year subscription when the item is viewed, to a request form which must be approved, and a license for 1 or 3 years (and sometimes perpetual, with a yearly maintenance fee) is available. The staff member was required to decide if we could work with this process and establish a workflow to manage how the licenses are selected and recorded in the system.
  + Incumbent decides what kinds of tasks can be done by other staff, and ensures a workable process is in place and documented.
* Electronic Portfolios
  + E-resource collections can many thousands of items in them, with different editions of a title, and a title can be in more than one collection. It’s vital to select the correct items to activate.
  + Must decide when to resolve a problem and when to escalate it to a librarian.
* Metadata Management
  + Knowing when to use an existing record from the network zone versus downloading a new record from OCLC.
* Service Desk
  + Research questions: deciding how much information the patron can absorb, selecting appropriate resources for the question; deciding when the researcher should be directed to someone else.
  + Fulfillment: a patron owes money but says they have paid the fine and need the item for an assignment due tomorrow – decide whether to override policy, considering the ramifications of doing so. When to elevate this higher, considering time restrictions.

##### Impact

Impact on the organization is likely to extend to other workgroups and may also have moderate effect on clients and service partners. Errors are difficult to identify and correct. Errors that go undetected affect individuals, but rarely affect recommendations or actions affecting the University.

Examples:

* Service Desk:
  + Failure to respond respectfully and effectively to patron requests or concerns may impact patron satisfaction and institutional reputation.
  + Failure to respond appropriately to emergency situations in the library may result in severe or imminent safety risks to students, staff, and faculty, as well as damage to library facilities and/or physical library collections.
  + Incorrect information provided for research questions impacts students’ ability to complete course work satisfactorily; incorrect information provided to instructors impacts their ability to teach courses.
  + Mistakes have implications for colleagues who staff the desk, as uneven levels of service can be provided.
  + Interactions between library staff and students will impact student satisfaction with library services and, more broadly, student retention rates.
  + Performing an override to help a patron may result in the loss of the material, fines, or inability to supply the item to another patron.
* Finance:
  + Errors in controlling the budget result in over- or under-spending. Resources that could have been purchased are unavailable to students and researchers. The University budget is impacted.
* Acquisitions:
  + Instructors and students are affected if the wrong version of an item is ordered, or if required materials are not purchased.
  + The University’s standing may be affected when invoices are not paid on time.
* Metadata and Electronic Portfolios:
  + Materials that are not correctly linked will be unavailable to students and researchers, even though they have been purchased.
  + Since we share databases with 16 other Ontario university libraries, and participate in a worldwide network, mistakes can have consequences at other universities and libraries, impacting Trent’s reputation.

##### Responsibility for the Work of Others

Responsibility is primarily for the correct completion of work, but generally working along with those supervised.

**Direct responsibility:** Student Library Assistants on shift at the same time.

**Indirectly responsibility:**

* Lead hand to staff working in Acquisitions, Metadata, and Electronic Portfolios.
* Student Library Assistants – part-time student employees
* Following priorities outlined by direct student assistant supervisors, directs and supervises student assistants when working on the Library Service desk.
* Assists direct student assistant supervisors with ongoing training of Library Services student assistants when working at the Library Service desk.
* In the absence of the student supervisor, assists with modifying student assistants’ schedules as needed.
* Shares regular feedback on student assistants’ performance with their supervisor.

##### Communication

Communication involves the ability to clarify ideas and messages and to summarize or synthesize information according to the audience’s need. Must use judgement in discussing problems, presenting information, and making recommendations. Communication is with people at a variety of levels.

Internal: Students, Faculty, Administrators, Registrar, Finance, Payroll, Facilities, Security, Department AAAs.

External: Members of the public, other libraries vendors.

Example:

* Service Desk:
  + The Library Service Desk is the first point of contact for any Library questions or issues. Evenings and weekends, these are the only staff on site, so they must be able to communicate with any individual who enters the library. The library is a public building, so anyone can walk in. Questions can range from simple and directional ones to in-depth research queries.
  + Required to respond to people in person, by phone and online.
  + First point of contact for message sent to the general library email.
  + Explain rules and regulations to library patrons. This includes collecting fines and recalling items.
  + Explain to patrons and parents about library policies, requirements, and fines.
  + Discussing fines/loans with patrons (confidential).
* Acquisitions, Metadata and Electronic Portfolios:
  + E-portfolios can be extremely complicated, involving thousands of titles, and not all of them have been purchased. There is often communication back and forth with co-workers or vendors regarding exactly which titles should be included.
  + Contacting vendors to request unique items or to resolve issues. Ensuring the correct edition/format, etc is ordered by asking the requestor (faculty, Department AAA) for more details.

##### Motor/ Sensory Skills

Requirement for some level of precision, with some tolerance allowed. Keyboarding and basic manipulation of devices such as computer mouse, scanner, telephone, moving books.

Motor Skills:

* Fine Motor Skills: data entry via keyboard, mouse, scanner
* Dexterity - precision in manipulating a telephone, lifting books, pushing carts

Sensory Skills:

* Hearing: responding to queries at the Service Desk
* Sight: read barcodes, book spines, etc.

##### Effort

Work involves some effort which is not common to most jobs and requires physical demands such as remaining motionless for long periods of time, keyboarding for extended periods, moderate amounts of lifting, stretching, bending, standing, walking. Visual and mental demands involve periods of sustained concentration, sometimes in a busy environment with interruptions and distractions. Effort required causes moderate fatigue.

Examples:

* Multiple competing demands: participates in a variety of library services, deals with patron requests through multiple channels (in person, online, and via telephone), supports multiple Library & Archives units.
* Extended periods of visual attention and sustained concentration: compiling data, inputting information into library systems while verifying accuracy; undertaking complex scheduling, reviewing or testing detailed fulfillment procedures and intricate workflows.
* Dealing with frequent interruptions while working at the Service Desk.
* Ability to self-regulate under stressful and demanding circumstances.
* Ability to maintain a calm and professional attitude in emergency situations.

##### Working Conditions

Generally acceptable working environment with moderate exposure to disagreeable elements which may have some consequences on well-being.

Psychological Conditions:

* Complaints: from patrons regarding access to library collections, fines and fees, policies, availability of library space, noise, etc.
* Multiple competing demands - nature of the work results in unavoidable busy periods.
* Frequent interruptions.
* Confidentiality requirements.
* Stress due to possible emergency situations and dealing with them alone.
* Possibility of hostile situations involving stressed patrons or members of the public.
* Must be able to work evenings and weekends when required.