#### Trent University LogoOPSEU JOB DESCRIPTION

**Job Title:** Acquisitions & Finance Associate

**Job Number:** L-088 | VIP: 1259

**Band:** OPSEU- 6

**NOC:** 5211

**Department:** Library & Archives

**Supervisor Title:** Manager, Library Services

**Last Reviewed:**  June 22, 2022

#### **Job Purpose:**

Under the direction of the Manager of Library Services, the incumbent supports teaching and learning in the Trent community through acquisition responsibilities related to serials subscriptions, activations, and ensures accurate bibliographic records.  Other responsibilities include digitization and support for accessibility services, providing information and fulfillment services at the Library Services Desk, supporting Resource Sharing finances, and indirect supervision of student employees. Shares responsibility for covering service points during all operating hours including evenings and weekends.

#### Key Activities:

##### Finances

* Using Resources Sharing systems reports, verifies, processes, and resolves all accounts payable and accounts receivable transactions related to Resource Sharing operations, including compiling semi-annual payment requests and sending compiled requests to appropriate external institution/client group for payment.
* Administers accounts receivable for Resource Sharing requests for Canadian and international institutions, including billing internal departmental accounts as required for Resource Sharing services. Tracks recovery of accounts payable for exceptional resource sharing costs from Library clients.
* Compiles reports for debit, credit card, and TrentU Card transactions for all financial operations in the Bata Library, including revenues from library fines and fees.
* Provides finance support to the Manager, Finance & Administration.

##### Acquisitions - Serials

* Under the direction of the Scholarly Resources Librarian, is responsible for ordering, receipt, renewal, payment, claiming, and processing for all standalone print, electronic, and microform serial subscriptions.
* Determines and tracks bibliographic details for each publication, including format, frequency, publisher, and price.
* Verifies that serials received are correct and returns materials received in error, ensuring appropriate follow up for credits/refunds.
* Completes serials tasks within the library service platform (LSP), including the creation of pattern, copy, and profile records for serials.
* Maintains payment history for serial subscriptions in local file.
* Regularly prepares and disseminates claims for missing issues to be sent to vendors.
* For print subscriptions, ensures that completed volumes are collected and catalogued for the stacks.
* Processes the annual serial renewal invoice as required with attention to currency, format, frequency and/or publisher changes, and price increases.  Processes remaining serial invoices throughout the year.
* Provides forecasts for projected serial subscription expenditures.
* Ensures that serials are renewed or cancelled in a timely manner so that additional charges are avoided.

##### Acquisitions - All formats

* Processes acquisitions purchase requests, including 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 for the purposes of ordering.
* Receives and invoices materials in the Library Services Platform (LSP).

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##### Physical Processing

* Processes incoming materials by entering and confirming accuracy of physical item information in the Library Services Platform (LSP) and applies appropriate labels and stamps according to Library guidelines.
* Triages damaged Library materials for local repair and maintains an inventory of repair tools and supplies.
* Coordinates regular binding shipments for the bindery contractor for all Library materials.
* Establishes, maintains, and tracks bindery orders ensuring that binding is done according to the ANSI/NISO standard for library binding.
* Monitors bindery budget allocation and reports projected balances to the unit librarian; keeps track of invoices and supporting documentation from contract bindery; estimates binding budget for new fiscal year.
* Processes discontinued, cancelled and withdrawn titles according to Library guidelines.

##### Accessibility

* Provides librarians with support for library accessibility services, including local administration of the Accessible Content ePortal (ACE) service.
* Collaborates with the librarians, managers, and the Library Service Desk & Fulfillment Coordinator to ensure staff that work at library service desk are aware of library accessibility services and understand how to respond to or direct accessibility questions.

##### 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 marshal 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 the Library Services Desk & Fulfillment Coordinator and the Resource Sharing Coordinator briefs, directs, and supervises Library Services student assistants when working on the Library Service desk.
* Assists Library Services Desk & Fulfillment Coordinator and the Resource Sharing Coordinator 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.
* In the absence of the Facilities & Physical Collections Coordinator, briefs, directs, and supervises Facilities & Physical Collections student assistants.
* Shares regular feedback on Library Services and Facilities & Physical Collections 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 manager.
* Performs other duties as assigned by the unit manager.

#### Education Required:

* An undergraduate university degree (3 year) required ***and***
a Library & Information Technician Diploma or an acceptable equivalent combination of education and experience.

#### Experience/Qualifications Required:

* Minimum two (2) years of experience in libraries (academic libraries preferred), including at least one (1) year of experience working with an Integrated Library System (ILS) or Library Services Platform (LSP).
* Excellent customer service and interpersonal skills, with demonstrated tact and diplomacy, and a strong commitment to the promotion of positive public relations amongst users and staff.
* Demonstrated experience performing circulation services.
* Experience searching library catalogue and databases in Windows/Mac environments.
* Proficiency with Microsoft Office, and comfortable learning and using new technologies and applications.
* Excellent verbal and written communication skills
* Ability to work both independently and as part of a team, with awareness of when to take initiative and when to consult with others.
* Accuracy and attention to details in a complex and fast-paced work environment
* Demonstrated analytical ability, initiative, and problem-solving skills.
* Good judgment and ability to make decisions independently.
* Demonstrated time management skills with ability to handle and prioritize a high volume of demands and work under pressure.
* Demonstrated willingness to pursue additional education and training to complement the learning environment reflected in a progressive academic library.
* Physical ability to lift books and boxes, maneuver loaded book trucks, and lift and carry up to 15 kilograms.
* Able to commit to and be flexible in work schedule, including working daytime, evenings and weekends.

#### Supervision:

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

**Job Evaluation Factors:**

##### Analytical Reasoning

Requires analytic reasoning to apply to responsibilities that are diverse and somewhat complex, requiring judgement and adapting methods to arrive at solutions. Situations are broad in scope. Recommendations for standard practice are in place for many (but not all) situations.

Examples:

* Service Desk:
	+ 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.
	+ Working with numerous systems, staff generally attempt to follow documentation. However, in some circumstances a discovery and exploration-based approach is needed.
	+ 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.”
	+ 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?
	+ Loaning material is done during scheduled Library Services desk shift and follows established procedures and documentation. If an unforeseen issue arises, it is escalated to the Coordinator or the Manager of Library Services.
* Accessibility:
	+ Accessibility is a broad term, applied to general standards and adaptations specific to the individual and situation involved. We are expected to ensure the building and resources are generally accessible, using standards. But individual issues can involve reading a map, reaching a book, filling in a form, or a wide variety of options.
* Finances:
	+ Follows standards for reconciling funds.
* Acquisitions:
	+ Purchase requests are submitted by instructors and librarians, and they are searched in one or more databases to find availability, access options, and pricing. This information is relayed to a librarian, who communicates with the instructor or approves the purchase.
	+ When reviewing new or renewed e-journal subscriptions and connectivity, attention must be given to mode of access (i.e. IP versus username/password) or changes in publisher’s delivery and access (i.e. changes from paid subscription to Open Access). Good knowledge of existing packages and titles is required to avoid duplicate subscriptions.  Activating portfolios requires attention to detail to ensure holdings are correct and paid access is maintained.

##### Decision Making

Decisions are standardized but somewhat varied and adaptation is required. Staff receive occasional supervision but are often alone. Decisions usually involve determining the best process or deciding what level of service to provide, in a specific situation.

Examples:

* 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: working at the Service Desk, 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.
	+ 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.

Example:

* 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.
* Finances:
	+ Errors in processing and balancing daily accounts could leave bills unpaid or cause us to lose track of our accounts.
* Physical Processing:
	+ Inaccuracies in registering incoming subscription issues could cause gaps in the library’s coverage and take time to recover later.
* Accessibility:
	+ Sending an incorrect request to the ACE program would cause delays in providing access to the requestor.
	+ If staff are not aware of accessibility services provided, a user could be turned away unnecessarily.

##### Responsibility for the Work of Others

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

* Indirect responsibility:
	+ 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, donors.

Examples:

* 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.
	+ Discussing fines/loans with patrons (confidential).

##### 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.