

Supplemental Standards: Library Assistant Series

The supplemental standards for the Library Assistant job series are guidelines for classifying Library Assistant positions at the University of California, Berkeley. They are based on the University-wide class specifications for the Library Assistant series.

The standards are organized in two major sections:

1. **Level Factors**, which delineate for each of the five Library Assistant levels the following job factors: Supervision Received; Assignments and Duties; Guidelines Used or Provided; Required Skills, Knowledge, and Background; and Supervisory Responsibility.
2. **Function Descriptions**, which describe, by level, typical tasks performed in the following functional areas: Bibliographic Checking; Cataloging; Circulation; Reference; and Serials Processing. These functions were selected as benchmarks and do not include all functional areas within the library. Note that these are not job descriptions, but rather descriptions of functional tasks. This distinction is important, because a position may combine a variety of functions, and a single-function description would not, in such cases, accurately describe the position's total responsibility.

The third section of the supplemental standards describes the factoring process used to classify a multi-function position, or "total job."

Classifying the "Total Job"

The level of duties and responsibilities assigned to a position determines its classification. Because a position may entail a variety of diverse-level tasks—for example, a combination of operational-, advanced operational-, and advanced paraprofessional-level duties—it is necessary to ascertain its overall, or "total job," level in order to classify it.

This is done by factoring together the percentages of time allotted to each level of tasks required in the position. The result of this process is the "total job," and it is the "total job" which is classified.

Two examples illustrate the factoring process:

1. Position "A" is structured so that its task levels are allotted as follows:
 - o Library Assistant II - 55%
 - o Library Assistant III - 35%
 - o Library Assistant IV - 10%

The "total job" is classified Library Assistant III. Although a majority of the incumbent's time is spent on Library Assistant II-level tasks, this is partially offset by the 10 percent allotted to Library Assistant IV-level tasks. The position, overall, is thus stronger than Library Assistant II. But it is not Library Assistant IV, because (1) only a small percentage of the total job is at that level, and (2) a substantial portion of the position involves tasks classifiable two levels below that of the IV.

2. Position "B" is structured so that its task levels are allotted as follows:
 - o Library Assistant III - 60%
 - o Library Assistant IV - 40%

The “total job” is classified Library Assistant IV. In this case, IV-level tasks constitute a substantial portion of the total job, the remainder of which is classifiable at just one level lower.

These examples also illustrate two guidelines used in classifying positions:

1. The inclusion of high-level tasks in itself does not warrant classification at that level if the tasks constitute a small portion of the total job (or are performed only occasionally, as, for example, in the temporary absence of the employee who regularly performs them, or as part of a rotational assignment).
2. Higher-level tasks need not occupy a majority of an incumbent’s time to warrant classification at that level, if they constitute a substantial portion of the total job, and the remainder of the position’s tasks are classifiable at the next lower level.

Note: Position “A” and Position “B” are only examples of many job configurations which would result in similar classification decisions. The percentages cited in these examples should not be construed as absolute standards.

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I. Level Factors	Library Assistant 1 Entry-level	Library Assistant II Operational Level	Library Assistant III Advanced Operational level or Specialist	Library Assistant IV Highest Operational level, Specialist, Paraprofessional, or Supervisor	Library Assistant V Professional Level
A. Supervision Received	Work is performed under immediate supervision and review. Work is referred when standard procedures do not apply.	Work is performed independently within the specific guidelines of the functional area and/or library unit. Completed work is reviewed infrequently. Work is subject to review when guidelines do not apply.	Work is performed independently, under general supervision. Typically, completed work and decisions made are not reviewed when performed within the established guidelines of the library unit. Work and decisions are subject to review when guidelines require extension and/or interpretation, and when proposed solutions affect the coordination of work within the unit or with other units.	Work is performed independently within the general framework of established guidelines, under the direction provided by paraprofessional coordinators, managing Librarians, or other administrators. Functions and activities are subject to policy review.	Work is performed with full independence and decision-making responsibility under the general consultative direction of a Librarian or equivalent manager. Work and decisions are subject to policy and administrative review when development and implementation affect the overall operations of the library.
B. Assignment & Duties	Assignments are clearly defined. Duties are of a comparatively non-complex nature and may be described as routine tasks.	Assignments are defined by the specific objectives of functional areas within the unit, with the nature of the problem identified. Technical duties are at the operational level and are comparatively complex.	Assignments are defined by the general objectives of functional areas in the library unit, and in terms of subject and/or functional specialty. Duties are specialized at the advanced operational level and/or the basic paraprofessional level, and are more complex than typically found at the operational level. Assignments may include, as in the branch setting, responsibility for operational duties in several distinct functional areas.	Assignments and duties are defined by the broad objectives of functional areas in the library and involve a high degree of difficulty in subject and/or functional specialization, and the need for frequent application of paraprofessional knowledge.	Assignments and duties are defined by the overall objectives of a complex library unit and involve the highest level of complexity in functional/subject-area specialization or coordination, and the requirement for more frequent application of paraprofessional knowledge than is exercised at the Library Assistant IV level.
C. Guidelines Used or Provided	Work is performed within specific limits of prescribed procedures and/or defined instructions.	Guidelines used include general policies and precedents as well as written codes and manuals. Judgment is used in applying guidelines to problems.	Guidelines used include policies, procedures, and precedents of the unit and the library as well as professional and technical codes and manuals. May assist supervisor/unit head in developing local policies.	Guidelines include the general policies, procedures, and precedents of the unit and the library, as well as professional and technical codes and manuals. Incumbents exercise initiative, originality, and judgment in applying established library principles and practices to new and unusual problems.	Work performed at the Library Assistant V level is characterized by the relative unavailability of established guidelines for performance, within a general framework of unit and Library policies, incumbents themselves analyze, evaluate, interpret, and revise established guidelines, relying as needed on the general direction provided by Librarians, Library committees, and Library Administration.
D. Required Skills, Knowledge and Background	Basic knowledge or terminology and procedures enabling the performance of duties within a functional area.	Functional knowledge of terminology and procedures enabling the performance of a full range of technical duties within a subject area; basic operational-level knowledge of library practices and procedures; technical problem solving skills.	Specialty knowledge and substantial background enabling the performance of a full range of specialized duties in a functional area (e.g. cataloging rules, understanding of authority records); general knowledge of library practices and procedures; advance problem solving skills.	Paraprofessional knowledge enabling the performance of a full range of difficult specialized duties in a functional area or specialized subject-matter field; advanced decision-making ability. May require knowledge of a foreign language. May require knowledge of speciality resources (e.g. government document resources or national cataloging databases).	Advanced knowledge enabling the performance of a full range of coordinating and/or highly specialized functional/subject-area activities. This knowledge may be acquired through considerable library experience, possibly in combination with specialized training and skills or relevant academic preparation. Have in-depth knowledge of major reference sources and cataloging rules, have subject specialty expertise and/or foreign language comprehension.

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<p>E. Supervisory Responsibility</p>	<p>May oversee basic operations in a limited area of responsibility, for a specific shift, including the monitoring of routine clerical duties performed by Student Library employees.</p>	<p>May have limited responsibility for training, work assignment, and review of work for Student Library Employees and/or Library Assistant I-level staff in a single task or operation. May serve as a work leader in a small unit.</p>	<p>May have full supervisory responsibility for a small unit or equivalent organizational structure, including hiring, training, recommending appropriate disciplinary action when necessary and assigning, reviewing, and evaluating work. May serve as sectional or functional-area work leader in a unit composed of several areas of operational responsibility. At this level, work leaders perform as functional area specialists, performing the more difficult tasks in the unit as well as training, assigning, and reviewing work performed by lower level Library Assistants and clerical personnel.</p>	<p>May supervise the staff and operation of a unit which, by reason of its complexity, its workload volumes and/or the size and level of its staffing, requires greater scope of supervisory responsibility than at the Library Assistant III level. May have management responsibility for a library unit.</p>	<p>May supervise the staff and operation of units composed by several areas of functional responsibility; or, fully responsible for management and coordination of activities of a very large unit. These units typically involve operations which are very complex and/or large in volume, and include supervision of a large SLE and LA staff. May manage a very large, complex library unit or specialized work flow, and/or project. Supervisors at this level coordinate the work of the unit with the work of other units.</p>
<p>II. Level Functions</p>	<p align="center">Library Assistant 1 Entry-level</p>	<p align="center">Library Assistant II Operational Level</p>	<p align="center">Library Assistant III Advanced Operational level or Specialist</p>	<p align="center">Library Assistant IV Highest Operational level, Specialist, Paraprofessional, or Supervisor</p>	<p align="center">Library Assistant V Professional Level</p>
<p>A. Selection</p>			<p>Provides basic review of approval plans and blanket orders, ensuring material received conforms to established profile. May assist a selector with the following duties: pre-order searching (e.g., publishers' catalogs, LC cards, bibliographies), selector referrals, maintain desiderata lists, process Procard transactions, placing orders through central order division.</p>	<p>Reviews and monitors publishers' catalogs and other bibliographic resources (all formats) based on overall knowledge of academic program. Makes acquisition recommendations to a selector. Places selector orders through central order division, or as appropriate, directly through suppliers. May route selection decisions for titles directly to faculty. May field gift or donor-related transactions.</p>	<p>Serves as selector for one or more subject specialties. Participates in selector-wide activities and performs selection-related duties without review or direct supervision. May have fund authority and may be required to manage budget requests and allocations. Using appropriate selection tools, determines which works (all formats) should be added to the collection based on the current and future research needs and academic curriculum. May independently or in consultation with selector/collection development officer create and manage approval plans or depository arrangements, review incoming and/or rejected material, and/or initiate modification of the profile; serve as vendor contact for negotiating license agreements and coordinating library access to electronic databases; review collections for comprehensiveness and create desiderata lists; place orders through central order division or directly to the vendor; place referrals with other selectors as required; work with gifts or donor-related projects; may determine whether replacement or withdrawal is appropriate for missing materials; may select materials for</p>

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B. Cataloging	Performs cataloging support functions such as spine-labelling, paging library materials, and adding local identifying data to catalog records for English language material.	Performs cataloging online at a terminal linked to a bibliographic utility by searching for cataloging useable copy of categories of material which can be cataloged online. Obtains printouts for items that cannot be cataloged online and route for further processing. Adds local identifying data to catalog records for English and/or Western European language material and adds coding for local systems support. Performs routine local on-line catalog maintenance. Keys records into local system. Sorts and distributes incoming materials to appropriate workflows.	Performs copy cataloging of English and/or Western European language materials. Performs database maintenance and added copy tasks in local database. Performs replacement cataloging in local database. Performs upgrade of cataloging in publication records (CIP). Performs updates of lower level records in local database. Creates minimal-level records in a local database within established local guidelines. Has familiarity with a variety of foreign languages and may catalog this material with matching records.	Performs difficult copy cataloging in all formats. Works with serials and other multi-part materials. Works with a variety of special formats such as microforms, media and electronic resources. Upgrades records in all formats. Catalogs or adds to materials such as serials, analytic records, bound-withs, photocopies and multi-part materials. May perform successive entry cataloging for serials. May assign classification if record has subject. May assign classifications and/or cutter call numbers based on existing subject headings or local guidelines. May create new records on national or local database based on existing record. May perform brief/partial cataloging within established local guidelines. Performs more difficult database maintenance, more difficult added copy database maintenance, more difficult replacement cataloging, and more difficult upgrades on catalog records in national and local database. Performs authority record creation and/or editing in local database. May edit and merge short headings.	Performs full original cataloging. Performs complex cataloging problem-solving for serials, series, and/or other multi-part materials. Catalogs mergers, splits, and other complex links for serials. Catalogs titles requiring difficult series and serial treatment decisions. Performs complex editing and replacing of catalog records in national and local databases. Catalogs complex multi-part materials, analytics, multi-part analyzed sets and multi-parts within multi-parts, serials set within sets, serials within series, and subseries. Performs complex cataloging involving titles published in multiple formats. Performs subject analysis, most difficult classification, and complex database maintenance. Contributes authority records to national cooperative cataloging program and/or perform complex authority and headings work in local database. May serve as a cataloging resource or trainer.
C. Circulation	In general circulation setting performs general circulation functions, answers routine informational/ directional questions. Explains and upholds policies & procedures, handles routine complaints.	Performs tasks listed under LA1 at an operational level. May have additional responsibility for other specialized tasks. Implements policies & procedures, handles more difficult complaints. Performs basic processing of circulation notices.	Circulation unit has one or more of the following: low to moderate circulation activity, a limited number of formats or loan periods, defined user group, medium-sized group of students and/or career staff working at the circulation desk. Performs advanced circulation functions, such as adding volume/copy information or changing circ codes in local online catalog.	Performs independently as circulation supervisor in large, more complex circulation unit, which has one or more of the following: high circulation activity, large number of formats, multiple loan periods, diverse user group, large group of students and/or career staff working at the circulation desk. Independently interprets and applies policy, or assists unit head in creating and developing local circulation policies and procedures. Oversees processing of circulation notices. Contact person for patrons with circulation problems.	Creates, develops local policies and procedures.
1. Reserve	Provides services to patrons in a general circulation/reserve setting.	May process reserve materials.	In unit with moderately-sized reserve system, solicits, reviews reserve lists, advises reserve processing staff. In larger units, may be the supervisor for reserve function.	In unit with large course reserve system, may be the front line contact with instructors, in charge of training and monitoring reserve functions and staff.	
2. Shelving, Stack Maintenance		Performs stack maintenance per established guidelines.	In unit with straightforward stack arrangement, may supervise and train staff in stack maintenance.	In unit with more complicated stack arrangement such as special collections with multiple locations, formats, and classifications, may supervise and train staff in stack maintenance.	Responsible for stack maintenance for one of the large central or subject specialty library collections/space. Plans, organizes and directs operations. May be responsible for a major surge or relocation. Serves as consultant for moves of other collections.
3. NRLF Procedure		Processes basic NRLF requests.	Performs advanced bibliographic verification and recall of NRLF materials. In charge of deposit preparation.	Supervises and trains staff in verification & recall of NRLF materials. Plans and supervises deposit preparation.	Manages staff unit in carrying out NRLF deposit and processing programs.

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4. InterLibrary Services		Prepare material for shipment to other libraries using knowledge of various requirements for different delivery systems. Update records in various automated systems.	Apply local policies for loans to other libraries. Interpret other library's policy for loans to local patrons. Oversee document retrieval service. Coordinate with staff to pay or generate invoices as appropriate. Coordinate courier service and other transport contracts as needed to provide a short turnaround time for interlibrary delivery. Coordinate with other libraries to retrieve and produce documents for interlibrary lending and document delivery services.	Handle extraordinary loan and copy request from other libraries. Negotiate with subject specialty and affiliate libraries to arrange loans. Supervise complex document retrieval, delivery and other for-fee services.	Negotiate loan agreements with other institutions.
5. Billing/ Fining		Processes notices for billing and fining.		Supervises billing and fining discretion function.	Has library-wide authority to consult with campus collection agency to request amnesty.
D. Reference			May serve at a reference desk or general public service desk providing routine information to patrons using the library's catalogs and resources. Questions requiring specialized knowledge are referred to the appropriate librarian.	Questions requiring specialized knowledge are referred to the appropriate librarian. May provide one-on-one instruction session, provide general in-class presentations for lower division classes, or give general lectures on library collections and/or resources with a script developed in conjunction with a librarian.	Questions requiring specialized knowledge are referred to the appropriate librarian. Requires an in-depth knowledge of the particular collections, resources, and subject area(s). May participate in bibliographic instruction activities, developing original course content e.g., one-on-one instruction session, specialized in-class presentations, general lectures on library collections and/or resources. May create research guides.
E. Acquisitions/Processing/ Interlibrary Services					
1. Monographic Processing	Unpacks and sorts received material. May annotate information on packing slips as appropriate using established guidelines. Routes misdirected material to appropriate locations.	Performs tasks listed under LAI. In addition, performs basic receipt functions for a variety of materials with minimum level responsibilities regarding bibliographic checking in a variety of print and online sources. May perform simple order record creation (e.g. order for record only).	Performs monographic processing tasks, including processing withdrawals, transfers, and monographic replacements, and performing complex record noting in local online database. Initiates cancellation and claims. Annotation and approval of invoices, checklists. May correspond with vendors. May update documentation. In a subject specialty location, may process gifts.	Performs high level of snag resolution. May be principal author of documentation and training materials.	Librarywide, provide training and support services. Create documentation of acquisitions/processing procedures and functions, setting goals and priorities for area of responsibility. Act as liaison with vendors, library administration, selectors or other staff members in establishing appropriate acquisition/processing arrangements.
2. Serials Processing	Unpacks and sorts received material, separating invoices, packing slips, etc. and referring as appropriate. Locates and retrieves material from Library holdings in Main and subject specialty locations. Sorts and maintains statistics of processed material. Routes misdirected material to appropriate locations. Reviews non-routine mail (e.g., catalogs, invoices, and advertisements) referred from other Library units.	Performs tasks listed under LAI. In addition, using established procedures, checks-in serials issues referring any problems to workleaders.	Performs advanced level of routine check-in and record maintenance of material in most languages. Advanced level includes creation of records, authoritative holdings maintenance, claiming issues as encountered, identification and resolution of more complex bibliographic problems, interpretation and analysis of order and payment records, and closing serial records. May have knowledge of one or more Western European languages.	Performs most difficult level of check in. Typically has subject, language, or format specialty and a major responsibility for material in that specialty. Coordinates the workflow for a specialized area (e.g., claims or snag resolution). Librarywide, develops procedures and trains staff in check-in, snags, claims. Researches and resolves complex technical problems. May be principal author of documentation and training materials. Independently resolves complex entry problems using internal and external bibliographic or institutional databases.	Responsible for coordination and management of central check-in division. Coordinates complex serials processing workflows among multiple library divisions. Librarywide, provides training and support services. Acts as liaison with vendors, library administration, selectors, or other staff members in establishing appropriate serials processing arrangements. Creates documentation of serials processing procedures and functions, setting goals and priorities for area of responsibility. Independently designs and modifies workflow in the division. Analyzes overall Library materials processing procedures and functions. Performs program analysis on complex projects. Works with other administrative staff and units to identify workflow issues, cross-training of staff, etc.

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<p>3. Gifts and Exchange/ILS</p>		<p>For ILS: Prepares books for shipment to other libraries using knowledge of various requirements for different delivery systems. Updates records in various automated systems.</p>	<p>For Exchange: Initiates and maintains exchange agreements. Corresponds with exchange partners; performs complex bibliographic checking; refers materials to selectors. Keys monographic and serial records in local automated online database. May order materials for mailing to exchange partners; may supervise bulk mailings. For ILS: Chooses locations for interlibrary loans based on local consortial and other agreements. Sends, receives, and determines disposition of requests on various automated bibliographic and ILL processing systems.</p>	<p>For Exchange: Performs tasks listed under LAIII. In addition, evaluates effectiveness of barter exchange agreements. Evaluates partner requests for barter monographs and for continuing or new journal subscriptions and recommends approval or rejection of funds from barter exchange budget. Devises and implements cost-effective strategies to maintain or to improve service received from barter partners. Monitors barter approval plans. Prepares annual reconciliation of barter exchange accounts. For ILS: Solves the most difficult bibliographic problems choosing the best tools from the Web, computer databases, and printed bibliographic tools as appropriate. Responsible for integrating various automated solutions into workflow.</p>	<p>For Exchange: Sets goals and priorities for Exchange Program. Manages exchange and barter budgets. Manages staff. Prepares budget requests. Evaluate and appraise donated material in compliance with state and federal taxation laws. Manage budget. For ILS: Negotiates loan agreements with other institutions.</p>
<p>4. Orders and Payments</p>	<p>Performs filing and sorting of material, orders, invoices, or other paperwork. Performs catalog record look ups and records elements within various automated systems (e.g. bibliographic, ordering, financial, or vendor systems).</p>	<p>Performs basic receipt functions for variety of materials with minimum level responsibilities regarding bibliographic checking in a variety of print and online sources. Basic order record creation.</p>	<p>Performs ordering tasks such as analyzing order requests and assigning vendors. May perform specialized searches (e.g. out-of-print). Retrieves complex payment information from campus financial systems. Annotation and approval of invoices, checklists. Exercises judgement in problem resolution referring to and consulting with managers or appropriate units or as situation directs. May update documentation.</p>	<p>Specialist or workleader for defined areas of responsibility which require more advanced knowledge and independent application of skills. Specialized ordering and payments functions (e.g. monographic ordering, serials, ordering). May oversee or manage a complex workflow, such as approval arrangement, out-of-print, or electronic purchasing. May be principal author of documentation and training materials.</p>	<p>Manages and directs a mid-sized ordering or payments unit with multiple functions and boundary crossing responsibilities. Coordination of complex acquisitions workflow among multiple library divisions. Librarywide, provides training and support services. Creates documentation of acquisitions/processing procedures and functions, setting goals and priorities for area of responsibility. Acts as liaison with vendors, library administration, selectors or other staff members in establishing appropriate acquisition/processing arrangements. Advanced database coordination, maintenance and error log processing. Represents UC Berkeley Library by attending regional or national conferences. Management of grant-funded and team based projects. Take initiative to develop and carry out project work.</p>
<p>5. Serials, Documents</p>	<p>Performs title/volume counts, retrieval, distribution, filing, and sorting of material. Performs catalog record look ups and records elements within various automated systems. Keys binding slips.</p>	<p>Performs tasks listed under LAI. In addition, performs basic receipt functions for a variety of materials with minimum level responsibilities regarding bibliographic checking in a variety of print and online sources. May collate issues for binding using established binding designations. May perform simple order record creation (e.g. order for record only).</p>	<p>Performs binding functions, such as pulling bindable units from collection and creating binding slips, modifying records as needed. May supervise binding operations for a small unit. Performs non-specialized claiming functions (e.g. non-depository). Performs post-cataloging of the first issues of serial publications. Monitors databases for uploads and downloads. Performs copy cataloging, adding call number, etc. for specialized government material (e.g. US Congressional Hearings; see also <i>cataloging function</i>). Processes transfers and withdrawals; may also process material for storage. May update documentation.</p>	<p>Specialist or workleader for defined areas of responsibility which require more advanced knowledge and independent application of skills. May oversee complex workflows, such as managing binding operations for a large collection with multiple locations, or managing the processing of multiple format or depository material. Oversees specialized binding for large projects. Performs claiming and order problem resolution for material with special receipt restrictions (e.g. depository). May be principal author of documentation and training materials. Coordinates transfer and/or withdrawal projects. Performs post cataloging for difficult bibliographic serials situations (e.g. successive entry changes). Performs database maintenance not requiring the attention of catalogers (see also <i>cataloging function</i>).</p>	<p>Coordination of complex acquisitions workflows among multiple library divisions. Librarywide, provide training and support services. Creates documentation of acquisitions/processing procedures and functions, setting goals and priorities for area of responsibility. Manages selector review operation. May perform problematic snag analysis for depository publications. Performs advanced post cataloging. Performs original cataloging and authority work for specialized government material (e.g. US Congressional Hearings; see also <i>cataloging function</i>).</p>

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6. Preservation	Performs bibliographic checking of library materials using the most common bibliographic tools. Prepares materials for photocopy and microfilm production. Sorts, files, and routes materials. Prepares bindery shipments. Checks microfilm for completeness/lack of defects. Barcodes films for storage facilities. Maintains workflow paperwork and statistics of completed work.	Performs bibliographic verification of library materials using a wide variety of bibliographic tools. Analyzes bibliographic information and prepares preservation replacement decision forms. Prepares materials for preservation using established procedures. Works with vendors to resolve problems and ensure high quality of their products and services. Maintains project-tracking database(s). Monitors quality control per established procedures.	Coordinates workflows. Maintains all binding records. Provides recalled materials as requested. Shares responsibility for controlling expenditures of the binding budget. Maintains documentation of procedures. May oversee non-complex grant-funded projects. Schedules bindery shipments. Performs complex bibliographic verification using all necessary bibliographic tools. Approves invoices for payment. Works with selectors to refine and modify preservation treatment options for specific items.	Oversees and directs complex workflows (e.g., coordinates production and billing with bindery manager) and prioritizes unit workload. Reviews and updates unit procedures. Consults on broad program preservation needs and resolution with internal/external units. Advises on policies, programs, and budget. Justifies expenditures to local and/or federal agencies /administrators. Manages expenditure of bindery budget. Participates in annual assessment and development of project proposals involving major resources.	Manage complex workflows among multiple library divisions. Acts as liaison with vendors, library administration, selectors or other staff in establishing appropriate preservation arrangements. Consults as expert in project development, resource allocation, and represents UC with external vendors and funding agencies. Provides overall management of grant funded and team-based projects.
F. Information Systems	Data entry (e.g., transcribing information exactly as presented); manipulate software to obtain information (e.g. adding barcodes, keying orders, Innopac records)	Data entry (transcribing with some interpretation of data); manipulate screen for additional entries in local systems, for example, BFS (Berkeley Financial System), online catalog maintenance; add volume/copy information; routine reports.	Data entry involving interpretation of content, with basic knowledge of software. Basic operation of software packages (e.g., Excel, Access, Filemaker Pro and internal UC systems, Innopac, PromptCat, and web-based electronic order/vendor systems); develop formulae for moderately sophisticated spreadsheets; set up routine computer procedures; resolve simple software/hardware problems; update and maintain WEB pages using knowledge of HTML.	Data entry with extensive interpretation & analysis of data. Operate highly complex databases and software to maximum capacity; manage subject-specialty unit software (e.g. PromptCat); troubleshoot; analyze procedures and policies for interface with program and Website developers; research and recommend hardware and software for general administrative use. Identify and evaluate academic sources on the web to update content of web pages.	Develop local procedures/ policies/ interfaces for new major electronic multi-unit software/web-based systems; work with vendors to implement workable systems; review, negotiate licensing agreements. Adapt and modify major systems for local use (e.g. use of Access for an Electronic Collection Management System). Primary contact with external vendors and consultants on programming modification. Note: the standards for LAV and Programmer Analyst overlap somewhat at this level; the distinction often being that the LA V will work more directly with the content of the materials, as opposed to the
G. Archival Assistant Functions	Archives Assistant Entry Level	Archives Assistant Operational Level	Archives Assistant Advanced Operational level or Specialist	Senior Archives Technician Highest Operational level, Specialist, Paraprofessional, or Supervisor	Archives Manager/Technician Professional Level
1. Scope of Duties (or Overview of Levels of Responsibility)	As instructed by an Archivist, perform routine tasks attendant to the processing of archival collections. Work is performed under close supervision, and in accordance with a processing plan written by an Archivist. Normally reports to LAIII or above.	Under supervision of an Archivist, incumbents carry out most of the tasks of Library Assistant I's but with greater independence and with broader knowledge of the local practices of Bancroft Technical Services. Work is performed under close supervision, and in accordance with a processing plan written by an Archivist. Normally reports to LAIV or above.	Under an Archivist's supervision, incumbents propose preliminary processing plans and carry out the processing of archival collections which are not of great complexity. They may also be assigned the same duties for a series or several series within a large and complex collection. They may supervise one LAI or LAII and several student assistants. Normally reports to LAV or above.	Incumbents perform the processing of complex archival collections under the general direction of an Archivist.	Under the consultative direction of an Archivist, incumbents perform the processing of complex collections, coordinate complex project workflows, act as liaisons to Reference Archivists, and, in consultation with Archivists, with the Division Head and with Curators, set priorities for processing and cataloging. BA required. Education and training in archival principles required.
2. Preliminary Processing Plan				Under the general direction of an archivist, survey and analyze collection content; do background research necessary to describe and arrange the collection; prepare proposed processing plan including recommended level of processing required, suggestions for specific series arrangements, finding aid elements, and timetable for completion. This processing plan is reviewed and finalized by the Archivist.	In consultation with an Archivist and/or Curator, plan overall arrangement of complex collections. Determine the order, specificity, and appropriate level of description and analysis. Requires broad understanding of the context and provenance of the collection and may involve historical research. Must understand and implement decisions recorded in accession, donor, and restriction records. Recommend priorities for collections to be arranged, described, and listed, based on knowledge of collection significance, urgency of

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3. Arrangement	Sort materials (manuscript, pictorial, etc.) by type, date, title, or other clearly discernable features; transcribe folder headings when refolding; make rough listings of container contents; make labels for containers.	May be assigned a simple series or subseries to arrange, house and describe under close supervision. Following the written processing plan, arrange manuscripts, pictures, records, or documents. (Arrangement includes tentative identification of and sorting of series and subseries as outlined by supervisor.)	According to established guidelines and a written processing plan, and under the direction of an Archivist, implement plans to arrange simple collections of manuscripts, archival records, and/or photographs. As instructed by the Archivist, compile notes needed for creation of a descriptive finding aid to the collection.	Under the direction of an Archivist, implement plans to arrange collections of manuscripts, archival records, and/or photographs. As instructed by the Archivist, maintain documentation of processing decisions, and compile notes needed for creation of a descriptive finding aid to the collection.	In consultation with an Archivist, supervise the implementation of plans to arrange collections of manuscripts, archival records, and/or photographs. Instruct and guide staff; explain and enforce standards; monitor and review the work.
4. Housing & Conservation	Assist with rehousing of collection materials.	Rehouse collection materials, transcribe folder headings when refolding	In consultation with an Archivist, identify items with special conservation needs and/or requiring conservation treatment. Provide suitable housing to prevent damage and deterioration of materials. Determines the appropriate housing based on knowledge of requirements of the different types of archival materials.	In consultation with an Archivist and/or Curator and representatives of the Conservation Department and the Library Photographic Service, develop plans for preservation treatment and the necessary workflow between BTS and Conservation. Monitor workflow for complex collections.	In consultation with an Archivist and/or Curator and representatives of the Conservation Department and the Library Photographic Service, develop plans for preservation treatment and the necessary workflow between BTS and Conservation. Monitor workflow for complex collections.
5. Description		When arrangement is approved, prepare folder headings and series/subseries identification according to established practices; create preliminary box or file folder listings of archival collections following standard practices of the model established by the archival unit (using appropriate word processing or database software), for final review by the Archivist. This is specific to format, sequence, and method; proofread collection descriptions and container listings.	With knowledge gained during the arrangement process, compose text to explain arrangement, adding descriptive information containing series, subseries, folder contents, biographical or administrative history, scope and content of the collection. Draft descriptive finding aid according to the model established by the archival unit (using appropriate word processing or database software), for final review by the Archivist.	Under the direction of an Archivist, and in accordance with national standards & local policy, draft finding aids for simple and complex collections. This may require extensive analysis and indexing based on knowledge of the relevant subject areas. Finding aids may include introductions indicating provenance, significance and related collections. Explanations of the arrangement, indexes, or special features of the guide are also included. Finding aid text is reviewed and finalized by the supervising Archivist. May encode finding aids in EAD (SGML) according to local policy and the Best Practices Guidelines of the Online Archive of California.	In consultation with an Archivist, and in accordance with national standards & local policy, prepare finding aids for complex collections which require extensive analysis and indexing based on knowledge of the relevant subject areas. Finding aids may include introductions indicating provenance, significance and related collections. Explanations of the arrangement, indices, or special features of the guide are also included. May encode finding aids in EAD (SGML) according to local policy and the Best Practices Guidelines of the Online Archive of California.
6. Reformatting & Digital Projects			Route and track materials sent to vendors or other library units for reformatting to microfilm or digital media. Perform quality control checking of microfilm. Enter basic metadata for digital objects in project databases.	In consultation with an Archivist, plan and coordinate reformatting to microfilm, digital, or other media. Supervise quality control checking of microfilm and metadata entry for digital objects in project databases.	Plan and coordinate complex reformatting projects to microfilm, digital or other media. Supervise quality control checking of microfilm and metadata entry for digital objects. Perform complex data management functions using project databases or other relevant information systems. Act as a liaison between library departments and outside vendors, coordinating technical and logistical aspects of project workflow, possibly for multiple projects.
7. Cataloging		Perform simple holdings maintenance, such as shelving or transfers to off-site storage or routing to LPS; carry out name authority checking for personal and corporate names appearing in collection description	Draft descriptive portions of USMARC collection-level records, according to AACR2 (APPM or GIHC), LC, BTS, and CDM policies and procedures. These records and the related finding aids are passed on to a cataloger for completion. Key in process collection-level USMARC records, according to local archival procedures.	Create preliminary USMARC collection-level records, according to AACR2 (APPM or GIHC), LC, and local archival and CDM policies and procedures. May suggest appropriate subject and thesaurus terms and provide information necessary for name authority work. Records are reviewed and finalized by a cataloger or cataloging Archivist.	Create full USMARC collection-level records, according to AACR2 (APPM or GIHC), LC, and local archival and CDM policies and procedures. Assigns appropriate subject and thesaurus terms. Do full original name authority work. Complete and upgrade preliminary cataloging records.

SUPPLEMENTAL STANDARDS: LIBRARY ASSISTANT SERIES (2002)

8. Reference and Public Service					Serve as a liaison between Reference Archivists, other Reference Personnel, and Processing Archivists. Coordinate scheduling of use-request processing and other workflows generated by Public Services and researchers
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