

Access Services Competency Set Portfolio Development Suggestions April 5, 2011

Access services are among the services most heavily used by library users. There are elements of technical services, involving library materials and records, and public services, assisting people. In the past few years, developments in technology and resource-sharing have expanded opportunities for collaboration among libraries. At the same time, these developments have supported increased sophistication and higher expectations in the user population. How libraries meet these expectations may vary by size and type of library, community demographics and specific goals and missions.

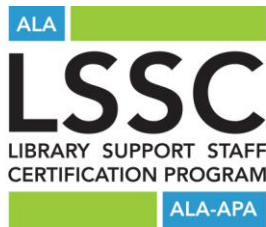
These Portfolio Development Suggestions (PDS) includes examples of possible activities you might use to demonstrate your achievements for each competency in this set. These activities or activities that you design yourself will be the primary documentation of your achievements for your online portfolio.

You might recognize some of these activities as experiences you have already had at work. You may also choose to use these as ideas for new self-directed learning projects and ways to demonstrate what you learned.

These are ONLY examples to help you get started thinking about both what experiences you already have related to specific competencies and what new learning you may want to pursue. While you may choose to use some of these suggestions for your Access Services portfolio, you may also choose other relevant activities from your experience or new learning activities to demonstrate your proficiency in each competency.

The goal is to demonstrate that you have achieved the competencies. Your documentation may be a written narrative, a video, an audio recording or digitized copies of documents you have already prepared in your work experience. You may submit these documents in any format that can be uploaded into your online portfolio. Remember to make a clear link between the competency and the document so that evaluators will know what competency you are demonstrating. When appropriate, you may also apply documentation for one competency to another competency. If so, indicate that in your portfolio.

Helpful Hints



In order to complete some of the activities you may need to conduct research. This research may be from print resources, web resources, visits to and observations of other libraries and interviews with library staff or library users. If you need to conduct research to complete one of the activities listed below, be sure to cite the resources that you consulted and your personal opinion of what you learned.

Some of the PDSs ask for a bibliography. Usually a bibliography should include notations that are both descriptive and evaluative. Descriptive means your notation briefly describes what is relevant; evaluative means your opinion about what you read.

In some cases, we suggest that you compare and contrast what happens in at least two libraries or other settings. Compare and contrast means that you identify the similarities and differences between the way different libraries or other settings operate. If you currently work in a library, you may use that library as one of the examples. You may use the same type of library for comparison (public OR academic) or different types of libraries (public AND academic). Unless the suggested activity specifically indicates that you should look for examples in BOTH public and academic libraries, you may choose which types you would like to compare and contrast. You can discover how other libraries operate by conducting online research or by visiting another library and interviewing its staff.

You may also be asked to analyze or describe “your community.” Community is a broad term that could mean the community served by a public library or the higher education community served by an academic library.

In Summary

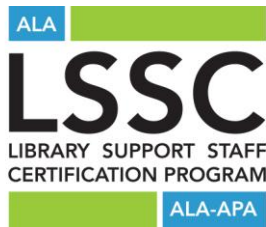
In summary, in order to submit this competency set as completed, you are expected to demonstrate that you have achieved each of the 16 individual competencies in the access services competency set. However, you are NOT expected to complete all of the examples listed with each competency.

Good luck as you achieve this competency set.

Library Support Staff will know:

Competency 1. Classification and organization schemes for collections.

Portfolio Development Suggestions



1.1 Discuss the advantages and disadvantages of the organization scheme for collections you are most familiar with (the Dewey Decimal System, Library of Congress or another). Which sections seem the most intuitive for library users? What problems do staff and library users have shelving and finding books using this scheme? How well does it bring together materials on the same subject? In what ways is it ineffective?

1.2 Interview two library employees, one in a technical service, such as cataloging, and one in public service, such as reference, about the advantages and disadvantages of the organization scheme used in a library. Summarize their responses and provide examples that illustrate their observations.

Competency 2. Processes for circulating library materials.

Portfolio Development Suggestions

2.1 Research and give specific examples of three processes involved in circulating library materials. Describe one of these processes in detail, step by step. What improvements would you recommend to improve this process?

2.2 List all the staff positions at a library that are responsible for all processes in circulation. Design a flow chart for the cycle of an item from its selection until it is ready to circulate.

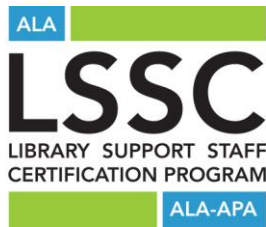
2.3 If a library uses a self-checkout system, investigate, through research and interviews, what changes this system made for library staff and users. Evaluate the use of such systems in libraries. What are its benefits to staff and to users? What are the problems encountered?

2.4 Different types of library materials, for example, books, magazines or equipment, often have different use policies. How do these policies differ in public and academic libraries? Review two policies from a public library and two policies from academic libraries and indicate the similarities and differences between the policies. What changes in policy or practice might increase access to specific users?

Competency 3. Basic characteristics of systems supporting circulation and interlibrary loan.

Portfolio Development Suggestions

3.1 Describe one commercial circulation system and one interlibrary loan system. Include brief information such as the system's name, the company that produces it



and its functions and special features. Discuss positive features of each system and how they might be improved.

3.2 Evaluate the features of a library's circulation and interlibrary loan system. Describe what features you would add to make both systems more useful and efficient for library staff and library users. Identify ways in which your library does or could work around not having these desired features.

Competency 4. Copyright issues pertaining to access functions such as routine circulation of library materials, course reserves, document delivery, and interlibrary loan.

Portfolio Development Suggestions

4.1 Find examples of copyright policies for three of the following library services or formats and create a Frequency Asked Questions (FAQ) sheet for each. The readers of the FAQs are adult library users:

- a) copying a journal article for placement on reserve.
- b) placing a journal article on e-reserves for a course.
- c) using a self-service copier, printer or scanner.
- d) making a digital copy of a journal article to satisfy an ILL request.
- e) making a copy of a book or media item for preservation purposes.

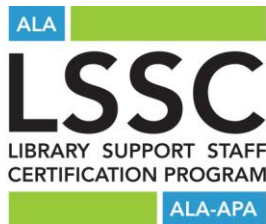
4.2 Find and complete a tutorial on copyright addressing library practices and issues. Provide evidence of completing the tutorial. Evaluate the copyright policy of your library in light of what you learned. Indicate how that policy might be improved.

4.3 Describe three examples of unique questions about copyright that library users have asked. How did you respond to these questions and where did you go to find the correct answers?

Competency 5. Principles, policies and procedures regarding user privacy in library services.

Portfolio Development Suggestions

5.1 Review your state's law on library user privacy and review a library's privacy policy. If you were training a student worker or volunteer, what would you teach them about protecting user privacy in access services? Which specific issues should they be able to address? Design a document for library workers to read and sign agreeing to maintain a library's policy and state law on privacy and confidentiality.



5.2 Using the Privacy Audit tools available on the ALA Website (see www.ala.org/ala/aboutala/offices/oif/statementspols/otherpolicies/privacyaudit.cfm) devise a privacy audit that would be appropriate to use in an Access services unit in a library.

5.3 What are a library's policies regarding circulation, Internet use or other areas for users under the age 18? How and why do these differ from policies for adults?

Competency 6. Policies and procedures for resource sharing among libraries.

Portfolio Development Suggestions

6.1 Describe the resource sharing system within your state or region. What types of libraries and institutions are members of the system? What is the role of each individual library within the system, and what privileges do the individual library and its users receive? What are the benefits and liabilities to these arrangements? What specific benefits or problems can you identify in the following categories: books, periodicals, audiovisual and staff?

6.2 Explain how you would answer a library user who says, "I don't want my library's materials to be shared with other libraries. I want them to stay right here because my taxes bought them!"

Competency 7. Principles of security for people, equipment, and collections.

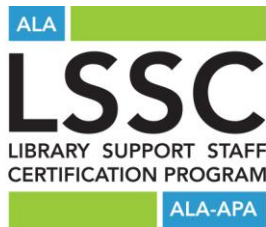
Portfolio Development Suggestions

7.1 Create a reading list including at least five articles or books on library security issues. Based on your analysis, evaluate how a library's policies and procedures address key issues for each of these three areas: people, equipment and collections.

7.2 Develop a personal safety training outline or program suitable for library Support Staff in all departments, with particular attention to those in the access services unit.

7.3 What security issues have you or your colleagues experienced? Interview staff members and discuss three incidents and how they were resolved. What did you learn about library and your community's policies and procedures?

Library Support Staff will be able to:



Competency 8. Propose and explain library policies and procedures regarding access services.

Portfolio Development Suggestions

8.1 For one month, keep a log of questions asked at a service desk about policies and procedures. What are the most frequently asked questions and how are they answered? Do these questions point to any necessary changes in policies and procedures? What are the obstacles to making these changes and how might you address those obstacles?

8.2 Review three library policies or procedures related to access services and recommend how they might be changed in light of recent or anticipated changes affecting libraries in general and your user community in particular.

Competency 9. Provide quality customer service to library users.

Portfolio Development Suggestions

9.1 Create a reading list including at least five recent articles or books on quality customer service in libraries. Address issues that are particularly relevant to access services.

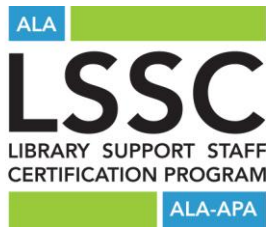
9.2 Develop a customer service survey for circulation, interlibrary loan or other access services unit in your library. Review your survey with a librarian and discuss their feedback.

9.3 Visit and observe customer services at least three other service-related operations (retail, grocery, restaurants, hospital, other libraries) and discuss how customers are treated from the moment they enter to the moment they leave. How is this treatment the same or different from a library's treatment of its customer? What techniques might a library adopt from other operations?

Competency 10. Manage people with diverse needs, diverse situations, and emergencies.

Portfolio Development Suggestions

10.1. Describe an emergency or problem situation that has arisen in a library at the circulation desk. How was the situation handled? How would you handle the situation in the future? What skills or qualities are needed to handle emergencies and problems



well? Outline ways in which these skills or qualities can be developed in access services staff.

10.2 What are some of the different access needs you observe with library users? These needs may be related to age, culture and familiarity with a library, familiarity with the community, physical needs or mental health issues. How do library staff address these needs? How does a library train staff to identify and respond to these needs? Discuss any specific access needs that relate to work at a circulation desk.

10.3 Complete the Accessibility Basics tutorial available at www.ala.org/ala/aboutala/offices/oitp/emiltutorials/tutorials.cfm and provide evidence of completion. Which issues are especially relevant to access services? In what ways, specifically, would you recommend that access services might be improved in your library?

Competency 11. Perform applicable financial transactions and record keeping.

Portfolio Development Suggestions

11.1 Create an electronic spreadsheet for a basic financial transaction (for example, fines collected for the day or materials purchases) or record. What should the spreadsheet include? Which staff member would maintain these records and for how long? How are these records used and how is access to them controlled? What confidentiality issues are there and how is confidentiality assured?

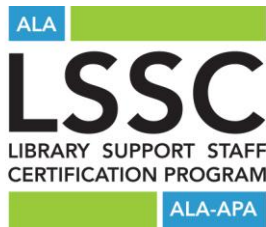
11.2 How does your library keep control over financial transactions such as fines? Document your understanding of the fine collecting process: how fines are calculated, how money is accounted for, what fines collected are used for within the budget, how annual fine collection is estimated and any changes in the last five years.

Competency 12. Maintain collections by shelving, shifting, and shelf reading.

Portfolio Development Suggestions

12.1 Create a training tutorial for new shelvers in one section of a library collection. Describe the shelf-reading procedures in your library and who participates in that activity. Which areas require the most frequent shelf reading and how is that need determined? Which areas require the most shifting?

12.2 Describe the role of library Support Staff in identifying materials for discard (weeding), replacing or relegation to storage. What is the role of access services staff; with whom and how do they collaborate with staff in other units? If your library



has materials in storage, how are these materials maintained? Who retrieves and returns materials kept in storage?

Competency 13. Assist with identifying materials for preservation and/or replacement.

Portfolio Development Suggestions

13.1 Make a list of the most common types of damage to library books that happen during circulation and within a library building. What are the visible signs of each? What are the options for recovery, repair or replacement of each?

13.2 Design ways that will help educate users with respect to materials preservation and how they can contribute to efforts to preserve library resources. Methods may include exhibits, posters, bookmarks, newsletter articles or photo essays. Be sure to use plain language rather than library-specific terms.

Competency 14. Manage appropriate systems and equipment for resource sharing, reserves, and user services.

Portfolio Development Suggestions

14.1 Identify systems, such as OCLC or a library's reserve system, and equipment, such as scanners, photocopiers or microform equipment, for resource sharing, course reserves and user services. What is the purpose of each? How do they interact with one another?

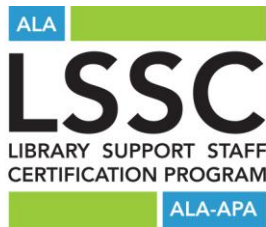
14.2 Track service requests for equipment in your department for one month. Analyze the results and discuss the most frequent problems and how they are addressed.

14.3 Design a fact sheet and check list to train library Support Staff in identifying and correcting problems with at least two pieces of equipment systems, such as OCLC or a library's reserve system, used in resource sharing services.

Competency 15. Troubleshoot and solve problems related to circulation and resource sharing processes.

Portfolio Development Suggestions

15.1 Keep a log for one month of problems you encounter in access services related to both public services, for example, circulation or resource sharing, and to technical services, for example, shelving, preservation or shelf-reading. Use this list to develop



recommendations on how library Support Staff in access services can contribute to improving services.

15.2 Describe the steps you would take to solve a problem such as a missing book, a conflict with a library user about a fine, a request for special privileges or another problem you have experienced? What information is needed to address the problem? Which individuals (co-workers, supervisors or library users) are involved in solving the problem? What are the possible resolutions of the problem?

Competency 16. Assist with collecting and reporting data on collections and services.

Portfolio Development Suggestions

16.1 Make a list of all the data collected in the access department. Which data are collected automatically and which data are compiled manually? Which are collected daily, weekly, monthly or at another interval? Estimate the degree of accuracy of each data report. How is each type of data used to make decisions or to evaluate library services?

16.2 Compare at least three types of circulation data collected by three libraries, using the *IMLS Public Library Data Files*, or *Hennen's American Public Library Ratings*, or *ACRL Statistical Summaries for Academic Libraries*.

16.3 Identify areas in which a library does not routinely collect data. Design and test a way to collect this data and indicate how it would be used if collected. If possible, collect this data for an appropriate period of time. Evaluate if the data collection effort was successful and what changes need to be made for improvement.