Access Services include on-site use and the routine circulation of resources in all formats, special circulation of course-reserved or other restricted-use materials, on-site and remote reciprocal circulation with users of partner libraries, interlibrary loan, and document delivery.

1. **Library Support Staff (LSS) know the traditional and nontraditional organization schemes for collections.**

   **Portfolio Development Suggestions**

   1.1 Discuss the advantages and disadvantages of an 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 employees 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 a 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.

2. **LSS apply and manage the appropriate processes, technology, and equipment for circulating library materials, resource sharing, reserves, and user services.**

   **Portfolio Development Suggestions**

   2.1 Research and give examples of one process involved in each of these activities: 1) circulating library materials, 2) lending materials to another library, and 3) or managing reserves. Describe one of these processes in detail, listing all the steps. What improvements would you recommend to improve this process?

   2.2 Investigate, through research and interviews, what changes a self-checkout system made for library employees and users. Evaluate the use of such systems in libraries and include discussions addressing the following questions: What are the benefits and challenges for employees and users? How does self-checkout relate to processes, technology, and equipment in a library?

   2.3 Different types of libraries often have different policies for circulating, reserving, or loaning items to other libraries for various types of library materials (for example, books, magazines, or equipment). Compare and contrast a policy on the same type of resource from two types of libraries. What changes in these policies might increase access for specific users?
2.4 Design a fact sheet and checklist to train library support staff to identify and correct problems with at least two pieces of equipment or systems (for example, OCLC, a self-checkout machine, a library’s reserve system, or a photocopier) used in resource sharing services or circulation.

3. **LSS understand and apply copyright principles and policies pertaining to access functions such as reserves, document delivery, and interlibrary loan.**

**Portfolio Development Suggestions**

3.1 Find examples of copyright policies for three of the following library services or formats and create a Frequently Asked Questions (FAQ) sheet for each. The readers of the FAQs are assumed to be 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

3.2 Find and complete a tutorial on copyright that addresses library practices and issues. Cite the tutorial you take and comment on its usefulness to you. Evaluate the copyright policy of your library in light of what you learned.

3.3 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?

4. **LSS understand and apply the principles, policies, and procedures regarding user privacy in library services.**

**Portfolio Development Suggestions**

4.1 Review your state’s law on library user privacy and review a library’s privacy policy. If you were training another staff member or volunteer, what would you teach them about protecting user privacy in access services? Which specific issues should they address?

4.2 Review one library’s policies about circulation, Internet use, or other services for users under the age 18. How and why do these policies differ from those for adults? What recommendations, if any, would you make for changes in the policies for those under 18?

5. **LSS understand and apply the policies and procedures for resource sharing among libraries.**

**Portfolio Development Suggestions**
5.1 Describe the resource sharing system within your state or region. What types of libraries and institutions are members of this system? What is the role of each member library, and what privileges do the member libraries and their users receive? What are the benefits and problems caused by these arrangements, in the following categories of materials, including digital formats: books, periodicals, and audiovisual?

5.2 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!”

6. **LSS understand and apply the principles, policies, and procedures of security for people, equipment, and collections.**

**Portfolio Development Suggestions**

6.1 Provide a bibliography of five articles in the area of library security. Briefly summarize the articles. Based on what you learned in your reading, analyze a library’s security policies and procedures. Tell how those policies and procedures address key security issues for people, equipment, and collections. Based on your research, what changes would you make in the library’s policy?

6.2 Develop a personal safety training outline or program suitable for library support staff in all departments, with particular attention to those who work in access services.

6.3 What security issues have you or your colleagues experienced in the areas of people, equipment, or collections? Interview staff members and discuss three incidents and how they were resolved. What did you learn about your library and your community’s policies and procedures?

7. **LSS understand and use effective communication skills to explain access services policies and procedures.**

**Portfolio Development Suggestions**

7.1 Identify the most frequently asked questions at a circulation desk about policies and procedures. 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 would you address those obstacles?

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

8. **LSS understand and apply customer service strategies to establish a welcoming atmosphere for all library users.**
Portfolio Development Suggestions

8.1 Prepare an annotated bibliography of five articles about quality customer service in libraries. Your notations should be descriptive and evaluative. Relate these articles to customer service in access services.

8.2 Develop a mock customer service survey for library users about circulation, interlibrary loan, or other access services in a library. Review your survey with a librarian and discuss the feedback you receive. What changes, if any, would you make in the survey based on this review?

8.3 Visit and observe customer service in at least three other service-related operations (for example, retail, grocery, restaurant, 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 customers? What techniques might libraries adopt from other operations or might they adopt from customer service in other libraries?

9. **LSS assist people in emergencies, diverse situations, and with diverse needs.**

Portfolio Development Suggestions

9.1 Describe an emergency or problem situation that has occurred 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 employees.

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

9.3 Research the basic principles of assistive technology in libraries. Which issues are especially relevant to access services? Make recommendations for improvements in a library’s access services.

10. **LSS perform applicable financial transactions and record keeping**

Portfolio Development Suggestions

10.1 Create an electronic spreadsheet as a record for a basic financial transaction (for example, fines collected for the day or materials purchases). What should the spreadsheet include? Which employees would maintain these records and for how
long? How should employees use these records and control access to them? What confidentiality issues could arise and how do employees assure confidentiality?

10.2 How does a library control financial transactions such as fines? Document your understanding of the fine-collecting process. Include how employees calculate fines, account for collections, estimate annual fine collections, and use fine revenues. Identify and discuss any changes in fine collection and use within the past five years. Why were these changes made? Under what circumstances may circulation staff waive fines?

10.3 How does a library control financial transactions, other than collecting fines (for example, cash donations, payment for copying or other library services, or interlibrary loan charges)? Document your understanding of at least two of these processes. Include how employees account for collections, estimate annual collections, and use these revenues. Identify and discuss any changes in collection processes and their use within the past five years. Why were these changes made?

11. LSS maintain collections by shelving, shifting, and shelf reading

Portfolio Development Suggestions

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

11.2 Describe the role of library support staff in identifying materials for discarding (weeding), replacing, or relegation to and retrieval from storage. How do access services employees collaborate with employees in other departments to complete these tasks?

12. LSS identify and solve problems related to circulation and resource sharing processes.

Portfolio Development Suggestions

12.1 Keep a log for one month of problems you encounter in access services related to circulation, resource sharing, shelving, preservation, equipment, or shelf reading. Use this list to develop recommendations on how library support staff in access services can contribute to improving services.

12.2 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 (coworkers, supervisors, or library users) are involved in solving the problem? What are possible resolutions of the problem?
13. LSS assist with collecting and reporting data on collections and services.

Portfolio Development Suggestions

13.1 Make a list of all the data collected in the access department. Which data are collected through the ILS 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 do employees use each type of data? What decisions might be made based on this data?

13.2 Identify areas in which a library does not routinely collect data. Design and test a way to collect this data. Describe how employees would use this data.