Circulation Clerk Competencies

Competency Set: Essential Technology Competencies

Core Email

**Performs basic functions of email applications**
- Receives, opens, forwards as needed or deletes email messages
- Composes or replies to, addresses and sends email messages
- Sends, receives and saves attachments
- Manages addresses/contacts
- Creates folders and files messages for retrieval as needed
- Identifies and uses Web-based email programs as well as desktop email applications

**Performs basic calendar operations and task management**
- Creates, accepts and sets recurring appointments
- Sets reminders for calendar items
- Plans and schedules meetings and invites attendees
- Creates and manages task lists

Core Hardware

**Understands, uses and helps others use basic computer hardware and peripherals**
- Understands basic technology terminology
- Recognizes and understands the functions of basic computer components (computer, monitor, keyboard, mouse, power supply, printer)
- Performs basic operations on computer hardware (plug in, start-up, shut-down, reboot, mouse functions, keyboard functions, uses headphones and speakers)
- Recognizes common removable storage devices (CD or DVD disks, USB drives, floppy disks) and identifies the appropriate drives
- Performs basic troubleshooting procedures for computer hardware and peripherals
- Understands the set-up and use of data projectors and other audio-visual equipment used for library programming
- Performs basic printer maintenance tasks (start-up, load paper and cartridges, clear paper jam)
- Demonstrates familiarity with the library’s assistive and adaptive technology and helps others learn to use it
• Demonstrates familiarity with library scanners and helps others use them

**Understands, uses and helps others use mobile devices**

• Demonstrates familiarity with the use of e-reader devices and downloading of e-books
• Demonstrates familiarity with other mobile devices in use in the library, including tablets and smartphones
• Assists patrons to find answers to their questions about device usage
• Assists patrons who want to print from their own devices to the library’s wireless-enabled printers

**Core Internet**

**Understands, uses and helps others use the Internet**

• Understands the basic structure of the Internet and of the World Wide Web (websites and Web pages)
• Identifies and uses common browsers for accessing the Web; understands and uses URLs
• Uses common functions of Web browsers (navigation buttons, scroll, add “bookmarks” or “favorites,” print)
• Downloads and saves files from the Internet, including image, audio and video
• Demonstrates familiarity with Web-based applications (in the “cloud”) versus desktop applications
• Downloads e-books and audiobooks

**Demonstrates information literacy**

• Identifies and uses search engines, Web directories and online databases
• Evaluates information critically
• Demonstrates familiarity with a variety of search strategies (keyword, Boolean operators)
• Identifies and helps others appropriately use the library’s online resources including the online catalog, databases, social media accounts, etc.

**Understands common security protocols related to Internet use**

• Understands the purpose of anti-virus and anti-spam software
• Identifies pop-up windows and blocks or allows them as necessary
• Understands the function of cookies
• Recognizes secure transaction sites and understands what type of activities are conducted there
• Understands and applies the library’s computer and Internet usage policies (CIPA, privacy, security)

**Core Operating Systems**

**Understands and performs basic operating system functions**
• Performs basic operating system functions (logs on/logs off, launches programs from the desktop or menu, uses multiple open windows, deletes files)
• Performs common file and folder management tasks and recognizes common file extensions
• Performs basic computer maintenance tasks (e.g., empties “trash” or “recycle bin,” restores files from trash, runs virus checks)

Core Software Applications

Understands and performs basic functions and tasks of common software programs
• Identifies different types and uses of common software applications
• Performs the manipulations common to most applications (open/close, maximize, scroll, print, etc.)
• Understands and uses the features common to most applications (menus, toolbars, taskbar, Help menu, etc.)
• Performs basic procedures to address software application problems
• Demonstrates familiarity with tools and methods for making technology more accessible for users with disabilities

Performs basic word processing operations
• Creates, opens and saves or deletes files
• Selects, cuts, copies, pastes or deletes text
• Performs operations to structure, format and spell-check documents

Performs basic printing operations from common applications
• Identifies printers available for a given workstation
• Identifies local versus networked printers
• Adjusts the set-up, previews print jobs and performs print operations

Core Web Technologies

Maintains awareness of commonly used technologies and applies technology effectively for ongoing learning and collaboration
• Uses technology as a tool to research, organize, evaluate and communicate information
• Uses digital devices, communication tools and social networks to access, evaluate and create information
• Uses technology to share information, communicate and collaborate with others
• Uses Web conferencing programs for synchronous, online meetings or learning
• Identifies and uses help menus, tutorials and support communities to acquire the necessary skills
• Locates and follows information sources to stay informed of new technologies and social tools
**Personal/Interpersonal Competencies**
In most situations in life, your effectiveness is enhanced by clear communication, strong relationships, ethical behavior and the flexibility to be a leader, team player and lifelong learner.

**Collaboration**
Unless you work alone in a cave, you must interact productively with others in order to accomplish your own and your organization’s goals. Master your interpersonal relationships and you have a recipe for success.

**Develops and maintains effective relationships with others to achieve common goals**
- Treats everyone with honesty, respect and fairness to build an environment of trust
- Contributes to a collaborative, committed and collegial work environment
- Pursues an understanding and embrace of individual and organizational diversity
- Acknowledges own strengths and contributions, and recognizes the complementary strengths and contributions of others
- Shares knowledge gained through professional discussions, conferences, formal courses and informal channels with colleagues
- Gives and receives constructive feedback from coworkers, supervisors and users

**Works effectively in teams with strong team-building skills and attitudes**
- Contributes constructively to the achievement of the team’s goals and objectives
- Assumes shared responsibility for collaborative work, and values the individual contributions made by each team member
- Contributes to a problem-solving environment and works toward mutually acceptable solutions, regardless of position or level
- Participates actively in information-gathering and decision-making in order to promote the best interests of the team
- Manages own and others’ time effectively to deliver work on time
- Finds opportunities to help others to develop new ideas and achieve their full potential
- Gives or receives coaching or mentoring from team members as appropriate

**Applies effective strategies to manage organizational politics, conflict and difficult coworker behaviors**
- Understands that organizations are inherently political (including libraries) and develops strategies to become an effective player
- Understands a variety of difficult behavior patterns and develops responses appropriate to each
- Routinely examines own behavior, accepts accountability for own actions and adjusts appropriately
- Understands and applies strategies for conflict resolution
Communication
Communication and collaboration are at the center of organizational effectiveness. The ability to interact with diverse individuals using technologies is imperative.

Communicates effectively using a variety of methods
- Communicates openly and directly, in both face-to-face and digital interactions, as well as in writing
- Identifies issues and ideas to be communicated and provides information that is accurate and timely
- Presents ideas in a manner that is clear and concise, with an appropriate level of enthusiasm
- Demonstrates proficient writing skills (good grammar and sentence construction, accurate spelling, logical thought)
- Demonstrates proficient public-speaking skills (articulation, strong delivery, appropriate animation)

Communicates effectively with a variety of audiences and individuals from diverse backgrounds
- Speaks and writes in a manner that is professional, welcoming and appropriate for all audiences
- Demonstrates understanding of each audience’s perceptions, perspectives and communication styles
- Fosters an inclusive, affirming and respectful climate for communication

Selects and applies the most appropriate and effective communication means to meet situational needs
- Communicates effectively to obtain consensus, persuade, instruct and/or motivate
- Understands and practices techniques of active listening and asking open-ended questions
- Selects appropriate communication strategies to manage conflict constructively
- Demonstrates negotiation skills to secure beneficial outcomes

Customer Service
The delivery of excellent customer service is a fundamental factor in effectiveness and needs to be prioritized throughout the organization. Interactions with users require trust, respect and focus on the needs of the individual. It is necessary to deliver quality customer service to virtual users as well as to users within the building.

Manages the library environment to enhance the user experience
- Organizes the library’s collections and work areas to appeal to users and to meet their needs
- Organizes physical elements in the library to create a positive and welcoming environment
- Addresses the physical or mental barriers that could prevent people from using the library
- Provides quality customer service to virtual users as well as to users in the building, ensuring that customer service principles are applied to online interactions
Develops and evaluates standards and practices for the delivery of quality customer service

- Creates a customer service plan
- Anticipates and maintains awareness of users’ needs and wants through customer service surveys, complaint logs and other means
- Analyzes input from users, evaluates the effectiveness of current services, and adjusts services and practices as applicable
- Uses effective training strategies to teach staff good customer service techniques
- Determines the relative needs of users, suppliers and library staff, and strives for balance in supporting them to achieve their goals

Applies customer service skills to enhance the level of user satisfaction

- Treats users in a welcoming, professional manner and provides other staff with an example of positive customer service
- Listens effectively to determine and address needs of the individual
- Acts as a goodwill ambassador for the library, promoting the library’s values and services in all user interactions
- Demonstrates thorough knowledge of all aspects of the organization that impact users (mission and vision, policies and procedures, collections and services, and system-wide strategies)
- Recognizes, honors and responds appropriately to diversity and cultural differences

Applies effective techniques to address difficult situations with users

- Encourages users to follow library policies; applies good judgment when deviating from official policies and procedures
- Deals with users’ concerns efficiently and effectively
- Maintains a calm, professional manner in difficult situations and applies effective communication techniques
- Responds to complaints and problems shared online in a prompt and professional manner

Ethics and Values
The library plays an important role in people’s lives and in their communities, and therefore, it is important for library employees to understand this social responsibility. It is important for individuals to reflect and develop self-awareness about the values and ethics that guide their practice.

Understands and acts in accordance with the basic values and ethics of library service

- Understands the history of libraries and their role in society, both in general and in the particular community
• Understands and adheres to the mission, values and vision of the library organization
• Understands relationship between laws and ethics and applies relevant state and federal laws
• Demonstrates familiarity with the Library Bill of Rights and the ALA Code of Ethics, and articulates the relevance to library service
• Applies a fundamental understanding of the ethical/legal issues surrounding the access and use of information technologies
• Understands privacy issues and protects user confidentiality
• Understands and promotes intellectual freedom and freedom of information
• Provides equitable services to all users
• Recognizes, respects and addresses the diverse nature of the library’s users and community
• Applies a fundamental understanding of the ethical/legal issues surrounding the access and use of information technologies.

Leadership
It is not necessary to have “manager” or “director” in your title in order to be a leader. There are both small and large opportunities to demonstrate leadership at any level. Solid project management skills, alignment with organizational vision and goals, and being responsible to others are all components of being a leader.

Aligns efforts with the vision and direction of the organization
• Demonstrates alignment with the library’s vision, works to achieve it and inspires others to do the same
• Identifies the appropriate opportunities, resources and timing to act in support of the library’s vision and mission
• Works to meet or exceed goals by obtaining resources and support, and by eliminating obstacles

Demonstrates leadership qualities and behavior
• Actively pursues and accepts leadership roles and demonstrates ability to lead teams effectively
• Uses interpersonal and problem-solving skills to influence and guide others toward a goal
• Leverages strengths of others to accomplish a common goal
• Fosters an environment based on integrity and high ethical standards
• Acts responsibly with the interests of the larger community in mind
• Empowers others to take ownership in decision-making and problem-solving
• Inspires others to be their best
• Takes initiative, seeks new opportunities and challenges, and applies creative and innovative thinking
• Maintains a positive attitude and sets an example for others to follow, no matter what position is held in the library
• Researches trends in leadership skills and styles and applies new knowledge effectively
Employs sound project management principles and procedures in the planning and implementation of programs and services

(See also: Library Management > Project Management)

• Understands the basic principles and procedures of project management and the importance of applying them
• Sets and meets goals, even in the face of obstacles and competing pressures
• Defines outcomes and expectations based on user requirements and needs
• Develops support for projects that implement library goals and objectives
• Uses resources efficiently, prioritizes workflows and manages effectively within budget limits
• Demonstrates attention to detail
• Establishes processes for evaluating the effectiveness of the project and implementing improvements as appropriate
• Understands and fulfills legal or project requirements for compliance, recordkeeping and reporting

Anticipates and adapts to change and challenges effectively

• Embraces and adapts to change with curiosity and enthusiasm
• Adapts to varied roles, job responsibilities, schedules and contexts
• Works effectively in a climate of ambiguity and changing priorities
• Maintains a positive attitude in the face of challenges and unanticipated changes
• Anticipates future trends and recommends changes in priority or direction in alignment with organizational goals
• Explores and adopts new technologies for their potential to deliver new ideas, products and services
• Recommends and takes reasonable risks to test implementations of change

Learning and Innovation
Change is the only constant and continuous learning is at the center of library culture. Remaining relevant and central to our communities requires innovation. Innovation is inherently a learning process. Individuals who thrive in this environment embrace ongoing change and are focused not only on the present, but also on the future.

Manages the development of one’s own learning and ongoing improvement of skills and knowledge

• Demonstrates commitment to learning as a lifelong process
• Understands the importance of lifelong learning for all levels of library work and actively pursues personal and professional growth through continuing education
• Formulates personal career goals, identifies learning needs and creates a learning plan to achieve them
• Takes personal responsibility for learning, shows initiative and is self-directed
• Recognizes the value of professional networking and actively participates in professional associations
• Understands and uses resources and strategies for keeping up with new ideas and technologies
• Seeks opportunities to apply new knowledge and to share best practices, research and experiences with colleagues
• Supports self and others in pursuit of a balanced lifestyle
• Seeks exposure to new ideas, both within and beyond the library field, and stretches beyond one’s comfort zone
• Pursues learning in multiple formats (including online) and practices self-directed learning

**Demonstrates critical thinking and problem-solving abilities**

• Reasons effectively
• Hones critical thinking skills
• Uses systems thinking, analyzing how parts of a whole interact with each other to produce overall outcomes in complex systems
• Synthesizes information, makes connections between multiple concepts and deduces effective arguments
• Reflects critically on learning experiences and processes
• Solves problems in both conventional and innovative ways
• Asks questions that clarify different points of view

**Uses creative and innovative approaches**

• Uses a wide variety of idea creation techniques, such as brainstorming
• Demonstrates imagination and curiosity
• Works creatively with others, staying open to diverse ideas and perspectives
• Incorporates group input and feedback into work
• Demonstrates ability to move from idea to implementation to put innovation into action
• Views failure as an opportunity to learn
• Acts on creative ideas to make useful contributions to the library, the community and/or the field

**Public Service Competencies**

**Circulation Services**

Circulation and interlibrary loan are like the circulatory system of the library body—keeping materials flowing in, out and around in a well-regulated manner, striving to deliver the right item at the right time.

**Understands and performs basic circulation operations**
- Demonstrates general knowledge of the library automation system in use and specific knowledge of the operations that apply to circulation procedures
- Performs circulation procedures for all library materials (check-in, check-out, renew, place holds, financial transactions, recordkeeping, etc.)
- Accesses the OPAC (online catalog) and uses a variety of tactics to locate items in the collection (via subject heading, author, title, keyword searches, etc.)
- Explains and performs intra- and interlibrary loan procedures, document delivery, resource sharing, reserves and other information retrieval options
- Understands, explains and adheres to circulation and resource sharing policies and procedures, including privacy and copyright issues, providing fair and equal access to the library's collection
- Keeps current with changes in the automation system and in circulation operations and policies
- Performs procedures for shelving, shifting and shelf reading
- Communicates effectively with a variety of audiences and individuals from diverse backgrounds

**Patron Training**

Depending on the size of library, there may be management positions or whole departments responsible for fostering patron learning. In some libraries, volunteers may be leading patron training. No matter where the responsibility resides, patron training and the advancement of 21st century literacy skills are crucial ways in which the library serves its community.

**Plans and manages training programs to meet lifelong learning needs of users**
- Establishes a budget for patron training and promotes its value to the library’s budget authorities
- Establishes a plan for marketing and promotion of patron training, including outreach and community-based efforts
- Identifies opportunities to partner with other departments or organizations to collaborate on training programs
- Identifies opportunities for combining training for staff and users; understands the advantages and disadvantages of doing so
- Identifies resources for training (technology, space and trainers) and coordinates with appropriate departments to obtain them
- Advocates for improvements to training space and equipment as needed, in order to create a setting that is conducive to learning
- Identifies and manages trainers (staff, external, volunteers) and training materials (use external, create new, repurpose existing); manages scheduling of classes
- Evaluates training programs, using appropriate evaluation strategies (post-class evaluation forms, debrief with trainers, etc.) and uses results to improve future training content and delivery

**Designs training curricula to build 21st century literacy skills and to meet lifelong learning needs of users**
• Understands the scope and the importance of 21\textsuperscript{st} century literacy skills and defines goals applicable to the institution
• Defines desired outcomes for patron training programs and builds a curriculum to meet those outcomes
• Identifies topics of importance and interest to library users by a variety of ongoing means (benchmarking with similar institutions, surveying users, collecting input from frontline staff, etc.)
• Stays aware of changes and adapts and updates, incorporating changes into training
• Understands and applies basic instructional design principles to design training
• Understands and applies learning theory, including learning styles, learner motivation and experiential learning
• Networks, collaborates, and shares expertise with library training peers by participating in online groups, email lists and face-to-face opportunities
• Attends workshops and webinars to constantly develop training skills

**Delivers formal training to fulfill objectives of the patron training programs**

• Articulates the library’s objectives for training users
• Selects the appropriate style and presentation methods for delivery of training, based on an understanding of adult learning principles
• Plans and prepares for learning session, including selection and preparation of class materials
• Prepares the learning environment, including set-up of computer labs
• Practices effective training techniques (presents ideas clearly, employs interactivity, uses a variety of approaches to accommodate learning styles, actively listens to student input, etc.)
• Demonstrates patience and empathy for learner needs and abilities
• Fosters a positive learning atmosphere, one that respects and values diversity
• Accepts feedback on effectiveness of training and seeks opportunities to improve techniques and behavior

**Provides informal instruction and assistance to build skills of library users**

• Perceives needs of users for “just in time” learning and demonstrates readiness to assist at the level of need
• Demonstrates patience and empathy for learner needs and abilities; practices active listening and seeks to convey ideas clearly
• Identifies and makes available tutorials and other resources for users’ self-paced learning
• Assists library users with searching the library’s catalog and helps them develop the ability to recognize an information need, meet it and evaluate the results
• Responds to questions and assists library users with their own devices, such as laptops, tablets, e-readers, smartphones, etc.
• Recognizes a user’s need for formal learning and identifies appropriate opportunities in the library’s class schedule or through other community organizations

Assists users on the public access computers with learning basic technology skills

• Instructs users in the use of the access, reservation, time and print management systems
• Understands and explains the security restrictions of the public computers and the user’s options for saving files
• Demonstrates patience and empathy for learner needs and abilities
• Assists users in learning to use the mouse, keyboard, operating system, etc.
• Assists users in accessing and navigating the Internet, understanding common security protocols, locating resources, and downloading and saving files of all types
• Assists users with online communication tools (sign up, create or reply to messages, manage contacts, attach files, identify spam and phishing messages)
• Helps patrons with questions and troubleshooting in areas where proficiency has not been attained

Public Access Technology
Computers for public use are among the main attractions that bring people into the library. Public computing has come a long way since its introduction in the mid-1990s. Progress has entailed increasing demands on the library to determine policies and on library staff to assist users with a variety of devices and software programs.

Provides support and assistance to users of the library’s public access technology, peripherals, devices and networks

• Provides one-to-one assistance to users of the library’s public access computers and printers
• Refers library users to technology training classes provided by the library and by other organizations in the community as appropriate
• Directs users of the library’s public access computers to self-paced tutorials for learning as appropriate
• Supports users of the library’s multimedia production equipment (e.g., digital cameras, audio recorders, video cameras)
• Assists people in connecting to the library’s wireless network
• Assists people in retrieving data from and storing data to portable devices (such as “thumb drives”) or to Web-based storage options (in “the cloud”)
• Assists people creating digital content using the library’s video/audio recording and editing software and equipment
• Assists people in using the library’s wireless printing
• Assists people in using the library’s scanner and photocopier
• Assists people in using the library’s adaptive and assistive technology
• Provides resources, support and permission for people to tinker, experiment and play with technology

Maintains and troubleshoots the library’s public access technology, peripherals, devices and networks

• Develops and executes plans for maintenance and update tasks of public computer hardware, operating systems, security and applications
• Logs issues with technology and reports to IT staff systematically
• Keeps current with advances in tools and applications of benefit to users and determines the implications of deploying them on the public computers

Develops, implements and communicates policies and practices for public access technology

• Understands and utilizes reservation, time and print management systems
• Establishes and publishes acceptable use policies for public access computers and wireless networks
• Understands filtering issues in relation to E-Rate and LSTA funds
• Understands issues related to access to social networking sites and programs