**Training checklist for [insert name of CML] volunteers**

* 1. **Introduction to staff**

I am aware of the:

* Library team leader **🞏**
* Library team members **🞏**
* Chair of [insert name of CML] **🞏**
* [Insert name of other organisations working with library, where applicable] staff **🞏**
  1. **Health and safety**

I am aware of the:

* Building and have had a tour **🞏**
* Signing-in book and location **🞏**
* Fire exits, evacuation procedure and meeting point **🞏**
* First aiders and first aid lifts **🞏**
* Personal safety and panic alarm location **🞏**
* Daily message book location **🞏**
* Accident and incident reporting procedure **🞏**
* Safe manual handling procedure **🞏**

I have completed the:

* Health and Safety induction **🞏**
* Health and Wellbeing awareness training online [insert link] **🞏**

**1.3 Volunteer hours and entitlements**

I am aware of:

* The need to be **ready to volunteer** 15 minutes before the agreed start time **🞏**
* Who to contact in regards to emergency, lateness, rearranging days and times **🞏**
* The dress code **🞏**
* Volunteer offers for the gym, computer use and DVD and CD hire **🞏**
* The volunteer expenses scheme and how to claim **🞏**

**1.4 Communication**

I am able to:

* Check volunteer notice board and daily task board regularly **🞏**
* Contact the Team Leader when required by email, text and phone **🞏**
* Find contact information for all partners ([insert names of partners])

and signpost users appropriately **🞏**

* Use the daily message book to communicate and know of data that should **🞏**

NOT be entered into the book

**2.1 Customer service**

I understand that I should:

* **Always** prioritise the customer in front of me ahead of any task I have been allocated **🞏**
* Direct community centre enquiries to the [insert name of library] chair’s email address **🞏**
* Direct in-depth library enquiries to libraries staff during staff supported hours **🞏**
* Or use the libraries message book appropriately **🞏**
* Treat all customers with courtesy and respect and comply with the [insert name of council] Equalities and Diversity policy as highlighted in [inset name of (online) course] **🞏**

**2.2 Using self service**

I can:

* Issue and return books for customers **🞏**
* Check their account (money owed, reservations pending etc.) **🞏**
* Power on the machine (RFID key) **🞏**
* Shutdown the machine (Admin card and RFID key) **🞏**
* Replace till receipt rolls **🞏**
* Recover the machine from ‘fallback’ mode **🞏**

**2.3 Tagging items**

I am able to:

* Identify and item that requires a new/replacement tag **🞏**
* Can add a tag to an item using iTag convertor **🞏**

**2.4 Library stock, shelving and tidying standards**

I:

* Have knowledge and understanding of adult and junior fiction categories and layout **🞏**
* Understand that non-fiction is in Dewey Decimal order and why this is important **🞏**
* Understand the importance of good presentation at all times **🞏**
* Recognise that library books are shelved in bays NOT across shelves **🞏**
* Understand importance of having 3 fingers width space at end of each shelf **🞏**
* Can check and shelve accurately in alphabetical/numerical order **🞏**
* Understand the importance of keeping books in good alphabetical order **🞏**
* Know how to check/shelve Mc's and Mac's **🞏**
* Can identify genres and shelve accordingly **🞏**
* Can carry out basic stock repairs **🞏**
* Prepare new stock for library use **🞏**
* Can identify items that require withdrawing **🞏**
* Can withdraw an item on the system **🞏**
* Have awareness of the eBook service and how to help customers access it **🞏**

**2.5 Shelf checks**

I:

* Know best practice in doing shelf checks **🞏**
* Know how to access shelf check requests **🞏**
* Can print the wants list **🞏**
* Can correctly find items on the shelf **🞏**
* Know how to send to requesting library **🞏**
* Know which skip to place in transit stock into **🞏**
* Can deal with requests for own library **🞏**
* Can follow up with items not found i.e. consult librarian **🞏**

**2.6 Knows where to look to find: print information sources**

* English dictionary **🞏**
* Medical dictionary **🞏**
* Guinness World Book of Records **🞏**
* Guide to Medicine and Drugs **🞏**
* World Atlas **🞏**
* London Street Atlas **🞏**

Competency based assessment

**2.7 Community Centre shop floor standards**

I know:

* Opening and closing procedure including turning on PCs and RFID **🞏**
* Where spare toilet rolls are kept **🞏**
* How to keep the kitchen tidy (cups and saucers returned to cupboard) **🞏**
* How to check for and distribute post **🞏**
* Where to empty litter bins at the end of the day **🞏**
* To clear newspapers at the end of the day and which papers to keep **🞏**
* How to top-up water features and that this must be done daily **🞏**
* To mark tasks as complete on the **Go To List** and where this is **🞏**

**2.8 Telephones**

I am:

* Aware of the telephone system i.e. '9' for outside line **🞏**
* Aware of the etiquette for answering the phone and standard greeting **🞏**
* Able to understand that the customer in front is priority over answering the telephone **🞏**
* Able to take borrower name and card number to renew books over the phone **🞏**
* Able to retrieve and transfer calls to another extension **🞏**
* Able to redirect queries to [insert name of council] direct, [insert name of CML] chair or Team Leader as appropriate **🞏**
* Aware of the procedure for calling emergency services (999) **🞏**

**3.1 [Insert name of CML] and [insert name of council] libraries**

I am aware of:

* The background to the charities origin, mission, values and vision **🞏**
* That I volunteer for the charity AND the library service **🞏**
* The background to London Borough of Barking and Dagenham libraries **🞏**

**3.2 Roles & responsibilities**

I am aware of:

* Roles of partners in [insert name of CML] **🞏**
* Roles of chair and trustees **🞏**
* Role of the team leader and team member **🞏**
* Roles of volunteers and keyholders **🞏**

**4.1 ICT provision in libraries**

I know**:**

* About PC usage policy **🞏**
* How much public internet use is allotted to each user type **🞏**
* About use and charges for Guest users **🞏**
* About printing facilities and charges **🞏**
* About scanning facilities and on which machines they are available **🞏**
* Photocopying facilities and charges **🞏**
* Procedure for Under 16's using computers **🞏**
* About wifi facilities and can explain how to connect a device **🞏**

**4.2 Using iCAM administrator**

I am able to:

* Help a user log-in to self-service computers with their library card and PIN no. **🞏**
* Turn on and log-in the iCAM control console and admin software **🞏**
* Set up Guest user login ID's **🞏**
* Report problems with computers and mark as Out of Order **🞏**
* End computer sessions from staff mode **🞏**
* Shut down PC's from the iCAM administrator software **🞏**
* Log off and shut down the iCAM administrator software and PC **🞏**

**4.3 Wireless printing**

I am able to:

* Explain the printing procedure and charges to customers **🞏**
* Retrieve printing for customers who have a wireless print release code **🞏**
* Load paper and deal with paper jams **🞏**
* Change toner and notify librarian of reduction in stock levels **🞏**

**4.4 Photocopying machine**

I am able to:

* Use the admin card to unlock the machine **🞏**
* Operate machine the machine for customers and explain charges **🞏**
* Help customers do basic copies **🞏**
* Help customers do advanced copying **🞏**
* Load paper tray **🞏**
* Deal with paper jams **🞏**
* Change toner cartridge **🞏**
* Know who to contact for maintenance and repair **🞏**

**4.5 Basic IT to assist users**

I am able to**:**

* Assist customers to open software on Chromeboxes **🞏**
* Save a document to an USB memory device **🞏**
* Set up an email address with different service providers **🞏**
* Attach a file to an outgoing email **🞏**

**4.6 Scanner**

I am able to:

* Show customers which computers can be used to scan documents **🞏**
* Help customers scan, save and attach items to email **🞏**
* Help customer print scanned items **🞏**

Competency based assessment

**5.1 Welcoming new customers: in practice**

I am able to:

* Signpost new customers to any partner's service **🞏**
* Explain requirements for library membership (proof of address etc.) **🞏**
* Understand the Terms of Membership and can explain this to customers **🞏**
* Explain membership entitlements and responsibilities: charges and how to avoid them **🞏**
* Explain the importance of email address for notification **🞏**
* Explain how the card can be used to access services from home including online resources (see **7.10**) **🞏**
* Explain how the card can be used in all LLC authorities **🞏**

**5.2 Our policies**

I am aware of the:

* Library byelaws and the Public Libraries and Museums Act 1964 **🞏**
* Guidelines on acceptable behaviour and how to deal with it in accordance with agreed policy **🞏**

**5.3 Guidelines in use around the service**

I am aware of the:

* Guidelines for under-aged children using library during school hours **🞏**
* Use of accessible toilets and baby changing facilities **🞏**
* Policy for use of power sockets in building **🞏**
* How to deal with a lost child **🞏**
* Guidelines on lost property/personal belongings **🞏**

**Axiell Basic Level Administration – Open Galaxy Touch**

**6.1 Axiell system and LLC**

I am able to:

* Understand the London Libraries Consortium and its members **🞏**
* Log-in to Open Galaxy system using individual log-in **🞏**

**6.2 Issuing and renewing items**

I am:

* Aware of the type of stock that is available for loan and the loan periods available

for each format **🞏**

* Able to issue items on Open Galaxy Touch **🞏**
* Aware of how to deal with a reserved item for collection **🞏**
* Able to refer holiday loan requests to librarian **🞏**
* Renew an item in customer records **🞏**

**6.3 Discharging items**

I am able to:

* Discharge an item on Open Galaxy Touch **🞏**
* Deal with an item in transit **🞏**
* Deal with an item on reservation for another location **🞏**
* Deal with an item on reservation at current location **🞏**
* Refer part returned/damaged items to librarian (Queries box) **🞏**
* Explain fines/charges incurred for late items **🞏**

**6.4 Van and delivery**

I am able to:

* Use discharge to receive items delivered by van and determine next action **🞏**
* Put items in transit into the correct skips **🞏**
* Understand manual handling procedure for skips **🞏**

**Axiell Higher Level Administration – Open Galaxy**

**7.1 Issuing and discharging items**

I am:

* Able to issue items on Open Galaxy **🞏**
* Aware of how to deal with a reserved item for collection **🞏**
* Able to renew an item in customer records **🞏**
* Able to discharge an item on Open Galaxy **🞏**
* Able to discharge an item on Open Galaxy **🞏**
* Deal with an item in transit **🞏**
* Deal with an item on reservation for another location **🞏**
* Deal with an item on reservation at current location **🞏**
* Refer part returned/damaged items to librarian (Queries box) **🞏**
* Explain fines/charges incurred for late items **🞏**

**7.2 Registering/updating library membership**

I am:

* Qualified to handle sensitive data (Managing Information training online) **🞏**
* Able to check customers ID (original copies) **🞏**
* Able to check customer’s names and addresses in borrower enquiry **🞏**
* Aware of the requirements for membership and borrowing rights **🞏**
* Aware of data protection issues when registering customers details electronically **🞏**
* Aware of the correct standards for entering details **🞏**
* Aware that email is the preferred communication method for overdue and

reservation notification **🞏**

* Able to enter home/mobile phone number; email addresses and set notification

options **🞏**

* Understand the importance of accurate entry of all fields including equality strands (ethnicity, faith etc.) **🞏**
* Able to amend customer’s details in Borrower Add/Modify/Delete **🞏**
* Able to link customers’ cards i.e. Parent and child **🞏**
* Able to provide or change PIN number to customer preference **🞏**
* Able to transfer a record to a new card and aware of charges **🞏**

**7.3 Registering online**

I am able to:

* Check customer IDs (original copies) **🞏**
* Complete additional required fields **🞏**
* Issue UNREG code to new card **🞏**

**7.4 Accessing customer records**

I:

* Use the barcode (library card) **🞏**
* Use Find to access customer record **🞏**
* Apply data protection principles when accessing customer information **🞏**

**7.5 Lost card**

I am able to:

* Update a customer record when card lost **🞏**
* Issue a replacement card using the correct procedure **🞏**
* Explain the charges for a replacement adult/child/senior citizen card **🞏**

**7.6 Paying charges**

I am:

* Able to use the till to give change **🞏**
* Aware that book sale money goes to CHCC charity (yellow bucket) not till **🞏**
* Able to pay overdue fines with/without receipt **🞏**
* Select individual fines on record using 'mark' **🞏**
* Aware of the procedure for disputed charges (refer to librarian) **🞏**

**7.7 Customer messages and notes**

I am able to:

* Access messages on a customer account **🞏**
* Distinguish between messages and remarks: Remarks for staff only **🞏**
* Add/modify/delete a customer message or remark **🞏**

**7.8 Catalogue**

I am able to:

* Perform a title search **🞏**
* Perform an author search **🞏**
* Perform a subject search **🞏**
* Perform a control number search and understands what this is **🞏**
* Apply necessary limits to search such as publication year, library authority,

material type etc. **🞏**

**7.10 Knowledge and administration of all aspects of reservations procedure**

I am able to:

* Place a reserve on [insert name of council] stock **🞏**
* Have knowledge of stock that can and cannot be reserved **🞏**
* Place a reserve on copy returned soonest **🞏**
* Know about LLC authority restrictions on reservation of some stock **🞏**
* Know how to deal with items with reservation message **🞏**
* Know where to shelve reserved items for home branch **🞏**
* Check a customer’s reservation list **🞏**
* Delete a reservation **🞏**
* Quote the reservation limit number (15) **🞏**
* Place a reserve and set pick-up location **🞏**
* Process reserved items for shelf to be picked up **🞏**
* Refer customers to relevant alternative online resources

i.e. TheoryTest Pro, GoCitizen etc. **🞏**

**7.11 Finding an item using self-service (OPAC)**

I am able to:

* Guide customers on how to use online catalogue **🞏**
* Help customer do a key word search **🞏**
* Help customer do an author search **🞏**
* Help customer do a title search **🞏**
* Help customer do an ISBN search **🞏**
* Help customer do an advanced search **🞏**
* Help customer add items to basket **🞏**
* Help customer limit searches by authority and format **🞏**
* Use OPAC to access council and .GOV services: My Account, online resources,  
  Universal Job Match etc **🞏**

**8.1 Reading schemes and awards**

I have knowledge of:

* Bookstart scheme and how to issue packs to parents **🞏**
* Bookstart Bear Club and operation in branches **🞏**
* Summer reading challenge scheme and operation **🞏**
* Council reading awards **🞏**

**9.1 Using the council website to find out information**

I am able to:

* Understand that the council website is a key information source for

library and council information **🞏**

* Guide customer to use the catalogue for online browsing, reservations and renewals **🞏**
* Guide customer to find out what's happening in the borough's libraries and the borough using the events calendar **🞏**
* Guide customer to access 24/7 online versions of key reference books,

encyclopaedias and dictionaries **🞏**

* Explain to customer how to download e-books from home 🞏

**9.2 Knows how to find subscription online information resources**

I:

* Know how to find, register for and use driving Theory Test Pro **🞏**
* Know how to find, register for and use Go Citizen **🞏**
* Know how to find and use Ancestry Library edition **🞏**
* Know how to find Oxford online services and what is available from this publisher **🞏**
* Know how to use Credo reference online and DK Eyewitness collection **🞏**
* Know how to find Britannica online and have awareness of the 3 versions and suitability for various age groups **🞏**
* Know how to find Issues online and awareness of content **🞏**

**9.3 Is able to use the council website to answer questions**

I know:

* How I can contact my MP **🞏**
* Who the local councillors are and when they hold their surgeries **🞏**
* Where the local registry office is **🞏**
* Where the community music service is based **🞏**
* How customers can get free school meals for their children **🞏**
* How to find out if there is a local credit union **🞏**
* Where I can find information on halls to hire in the borough **🞏**
* How many job shops there are in the borough and where they are **🞏**
* How customers can contact their local chamber of commerce **🞏**
* If customers are applying for British Citizenship, can they get the forms checked locally before they are sent in? **🞏**
* What activities are on offer at the nearest leisure centre **🞏**

**9.4 Enabling customers to access information**

I am able to:

* Show customers how to use PCs to access information **🞏**
* Assist customers to use council and library website to access information **🞏**
* Promote information resources to customers, including 24-hour information **🞏**

**9.5 Formats of information**

I am able to:

* To use and display leaflets to provide information **🞏**
* Check that the display of leaflets and posters is current, tidy and within guidelines **🞏**
* Use national and local newspapers for information - maintenance of collection **🞏**
* Have awareness of council consultation documents and use of libraries for deposit and viewing of public consultations **🞏**

**10.1 Libraries as a community space**

I:

* Understand that libraries serve as community space and hub **🞏**
* Understand community profile of library area **🞏**
* Understand that access and inclusion underpins our activities **🞏**
* Know who are our local partners and other local providers are **🞏**
* Understand how and why we form partnerships **🞏**
* Understand the role of partnership organisations **🞏**
* Understand how we work to access hard to reach communities **🞏**

|  |
| --- |
|  |