

Call Center Reference Competencies Checklist

- ❖ Logging on to Call Center computer: Switch on the CPU. Wait until the machine boots up to the Press Control-Alt-Delete screen. Do so. Type in *musref* and then the network password. Open up Millennium. User ID: musref; password: musref.
- ❖ To fax material: We will fax materials in response to a reference question free of charge. This is *not* an on-demand service. We will send the fax within 24 hours. Do not promise faster service unless you personally can do it. Locate the article text in any of the appropriate databases: *General Reference Center, Health Reference Center, General Business File*, online encyclopedias, etc. Print the article. Fax it.
- ❖ If you don't know the answer or cannot find the answer: Fill out the online "call back" form designated for that purpose and print it to the appropriate desk. Explain to the patron what you are doing and that the patron can expect a response from staff as soon as possible. Never guess at an answer or give your own opinion. Always be able to cite your source and the page number.
- ❖ If you are asked questions about Legal or Medical issues: explain that you can read a paragraph of text or so from an online source. You must never give your own opinion or advice - this can put the Library System in a position of liability for practicing law or medicine without a license. Libraries have been sued and have lost in court over this.
- ❖ What is a criss-cross? Will you look one up for me? A criss-cross means that the caller has a phone number or an address and would like you to look up the counterpart. Since you cannot leave the Call Center to check *Cole's Directory*, use the computer. Click on World Wide Web/Addresses, Phones, etc./AnyWho/Cool Tools/Reverse Directory (if you have the phone number only) or .../AnyWho/White Pages (if you have the address and/or name). Cell phone #s are not available in any directories at this time.
- ❖ When I am on the internet: looking for an answer for a customer, a message often pops up saying "This page contains both secure and nonsecure items. Do you want to display nonsecure items?" Don't worry. Click on 'Yes' and proceed.
- ❖ I need a Kelley Blue Book value: Go to World Wide Web/Automotive/ Car Buying/ Kelley Blue Book. Once there, follow the directions to obtain the figures requested. Practice on your own a few times. It's easy, reasonably quick, and extremely informative!
- ❖ Filling out an InterLibrary Loan form: over the telephone. Fill out the top third of the form, taking as much information as you can from the customer. Verify the card number in Millennium and initial. Then read the contractual agreement to the customer and ask that they agree to its provisions. In the spot for Patron signature state that the above was 'Read to customer' and initial it. Put the completed form in Mary's mailbox.
- ❖ Patron is requesting a new book which we do not own: Offer to fill out a 'Books 'n Things' form with whatever information customer can provide. Search item in *Books in Print*, print a copy, then place in Neil's mailbox. You may also fill out the online request form found under "Contact Us/Suggest a Purchase".

- ❖ Book drops: Materials can be returned to any Scottsdale Public Library branch, not just to the branch borrowed from. There is a list of other locations where library books can be returned under the link “Return Materials” under “Library Catalog.”
- ❖ Bomb threat form: Please review the bomb threat form which is underneath the Call Center telephone. Please also put it back there. You’ll want quick access if you ever need to use it, trust me! (You don’t want to be saying “Hold on while I get the bomb threat form.”)
- ❖ Drop Box for City Bills: Outside on the end of the drive-through book drop there is a slot where citizens may drop in payment of their City utility bills.
- ❖ Posters and handouts: Only City of Scottsdale and other government agencies’ materials may be posted and distributed within the library. If you have a question or the person requesting is persistent, refer them to Sharyn Pennington at CC. Pat Toftoy posts handouts at Mustang and can answer questions as well.
- ❖ Citizens’ Request for Reconsideration: Anyone may come to the Information Desk to request a form to ask the library to reconsider stocking any item for any reason. These are forwarded to a committee who will look into the request.
- ❖ Tax forms: All federal tax forms are available from the IRS website for downloading and printing out at 20 cents per page. Arizona tax forms are available in our lobby area during tax season as well as on line.
- ❖ Microsoft Office Suite: Mustang Library now offers Word, Excel and Power Point on all PCs. Diskettes may be purchased from Circulation. Downloading to the A: drive only is permitted. Printing is 20 cents per page. Our virus-checker runs every time a diskette is inserted into the A: drive.
- ❖ Americans with Disabilities Act aids: Mustang carries a variety of aids for hearing- and seeing-impaired individuals. At the Information desk there are magnifying glasses of all sorts and headphones. There is an Optelec Reader on the wall near the foreign language collection. The Optelec enlarges and lights up a printed surface for reading on a screen. Next to it is the Sun Sounds receiver which provides programming, such as talking books, for people who cannot read. We also have a TDD telephone.
- ❖ Looking up names: in any catalog and many databases whenever you are looking up a name, for whatever reason, in whichever database, don’t forget to use the format: Schweitzer, Albert. Or if you are using the honorific, Schweitzer, M.D., Albert. Looking up ‘Albert Schweitzer’ will result in no or few hits in most catalogs. Some databases have separate fields for names so this would not apply. In free text searching you should always observe the format above.
- ❖ A, an, and the: Remember to ignore these articles whenever they are the first element of a title. Typing them in your title search will result in no hits.
- ❖ Ask Questions! Please know that many people do not ask for what they really want the first time. Sometimes you will need to ask leading or open-ended questions to try to get them to open up or to be more precise or to clarify. It is fine to ask the customer questions - only by knowing what they truly want can you help them.

Youth and Teen Call Center Competencies

11/05/05

Youth Services:

Looking at the information in the Calendar of Events, or checking the Kids Stuff webpage online can answer the majority of questions regarding programming. The following information shares more details about the programming.

1. Storytimes

All of our storytimes follow “Ready to Learn” and “Every Child Ready to Read” guidelines. They focus helping the caregivers learn how to help their children get ready to learn to read (through sharing the six essential pre-reading skills) and on school readiness. In most cases, no registration is required for storytime.

We offer the following programming:

- **Baby Time (0- 12 mos.):** Geared toward teaching caregivers how to interact with their babies, using music, books, fingerplays and pre-reading skills information/demonstration. Programs last about 20 minutes.
- **Time for Ones and Twos (1 - 2 years):** Focuses on toddlers and their caregivers, using books, fingerplays, music and pre-reading skills information/demonstration. Programs run about 20 - 30 minutes.
- **Shake, Rattle and Roll (all ages):** Music-based programming, including songs, musical instruments and action rhymes. This program also shares following directions in songs and singing along as pre-reading skills. Programs last about 30 minutes.
- **Family Storytime (all ages):** Similar in format to Time for Ones and Twos, but geared for a wider range of ages. Books, fingerplays, music and pre-reading skills information/demonstration are included. Programs last about 30 minutes.
- **Preschool Adventure (3 - 5 years):** Similar in format to Time for Ones and Twos and Family Storytime, with books, fingerplays and music offered, but different in the fact that the preschoolers attend the program without their caregivers. Because the children are older, the stories shared can be a bit longer and more complex. (Note: discussions are underway regarding parents’ attendance, with the sharing of the six skills in mind.)

We offer these programs on a five-week rotation, generally with a two-week break between series, to give staff time to prepare for their storytimes. The schedules for the storytimes can be found in the printed Calendar of Events and online on the Kids Stuff webpage, too.

2. Other Programming

Youth Services offers a wide variety of other types of programming throughout the year in the library system, including:

- Reading Café: Book discussions for children, ages 8 - 11 (registration required). Copies of the books are available at the Youth Desk, for participants to borrow in advance of the discussions
- Movie Showings: Feature length family films and story video programs are offered regularly (no registration required)
- Timeless Tales: A story-based program, featuring a tale from another culture, accompanied by another activity, such as a craft or food tasting (registration required)
- Book Character Bingo: Children play the familiar game of Bingo, with cards featuring the images of characters from children's literature (registration required)
- Children's Book Week events: Special programs are offered during National Children's Book Week, in mid-November.
- Seasonal events: Special programs are offered saluting holidays, or focusing on other celebrations, such as Black History Month, We the People Bookshelf, and Earth Day.
- Computer Classes: Mousercize (for ages 3 - 5 and their caregivers) and School Tools Rule! (for students, grades 1 - 6) are offered. (registration required)
- Summer Reading Program (age 0 - 12): An annual event, usually held in June and July, in which participants earn incentives by counting their reading and/or listening time. Special programming is also offered in conjunction with the Reading Program.

3. Program Registration

For registered events, please transfer the registration request to the Youth Services Desk.

4. Tours

Youth Services regularly offers tours to groups of young people and their caregivers, with advance notice. They generally include a tour of the building, and a brief, fifteen-minute storytime, for younger children. Older visitors usually receive a tour of the building only, though some may receive instruction in using the online catalog, or stay to do research on different topics, using library resources. Robin Alukonis (#22925) schedules the tours for Civic Center Youth Services.

5. Accelerated Readers

Many schools (including those with Scottsdale Unified School District) participate in this program. Children read books, based upon their reading skills, then are tested with a computer-based quiz on their reading comprehension, at their schools (not at the libraries). Each school's AR list is school-specific. We have several schools' lists online under Kids Stuff.

Be sure to check the online catalog, to see if the library system has copies of the titles being requested.

6. Lit Studies

The library system has over 70 book titles for children and teens divided into sets of 20 paperback copies each which will be available for checkout to teachers, book discussion groups, etc. This Lit Studies collection has undergone some changes over the summer. The collection will soon be available online on Millennium.

Scottsdale Unified School District Teacher Librarians have access to a current inventory of this collection in order to handle their teacher requests for reserves on titles.

The process of reserving and filling requests for the Lit Studies collection is still being refined. We predict the collection will be available for reserves and checkouts by the end of September 2006. Until then we are not able to place or process reserves on this collection.

7. Battle/Beyond Battle of the Books

While the library system staff no longer offers these programs to Scottsdale schools, we do have information and sets of Battle questions to offer to schools that wish to run their own competitions. Schools asking about this service should be referred to YS staff for more information.

8. Handling Requests to Pull Items

Customers (quite often teachers) may call to request staff to pull books and other items for them, based on a theme or on a list of titles. Staff will pull a maximum of 3 - 5 items per customer, and will encourage him/her to come in if more items are needed. We use these requests as an opportunity to show the customer how to look up their own material, by demonstrating how to use the online catalog.

9. Book Bites

This new, grant-funded program is offered in partnership with the Scottsdale Healthcare hospitals, with the aim of helping new parents begin to read to their babies, right from the start. Youth staff wrap and pack copies of a board book (in Spanish and in English), which are delivered, to the Shea and Osborn hospitals. Hospital staff give a wrapped book to new parents. Each package includes baby's first library card, which is activated upon their first visit to any SPLS library. The card is fine free for one year. When the card is activated, a special gift is given to the parent (a bib with the Book Bites logo on it). Staff promote our programming by offering a calendar of events. Also offered is a brochure - Parent Guide to Early Literacy, for Early Talkers (age 0 – 2).

Teen Services:

1. Teen Advisory Board (TAB)

The goal of the TAB is to empower teens and get them involved in decisions concerning the library and its role in working with teens. The TAB consists of teen volunteers, with staff assisting. The TAB meets once a month at Civic Center and Mustang libraries (there are two groups); meeting dates usually appear on the webpage. No reservations are needed and snacks are served.

2. Teen Programming

Looking at the information in the Calendar of Events, or checking the Teen Turf webpage online can answer the majority of questions regarding programming. The following information shares more details about the programming.

A variety of programming is offered to teens (age 12 - 18) in the library system, including:

- **Book Bistro:** A book discussion group for teens. Copies of the book can be picked up at the Teen Desk, or checked out from the stacks. (registration required; snacks served)
- **SAT Workshops:** Free programs that offer a practice test and tips on taking the SAT (registration required) Registration through Princeton Review – 1-800-273-8439
- **Craft Programs:** A variety of craft programs are offered, including card making, jewelry making, and t-shirt decorating (registration required).
- **Movie Showings:** Feature length films of interest to teens are regularly offered (no registration needed)
- **Life Skills Programming:** Programs covering such topics as dating, resume writing and money management are offered (registration required)

- Computer Classes: Building a webpage and creating a blog are two of the classes offered to teens (registration required)
- Seasonal Events: Special programs are offered saluting holidays, or focusing on other celebrations, such as Teen Read Week or Teen Poetry Month.
- Teen Summer Reading Program (ages 12 - 18). This annual program is usually offered in June and July. Participants earn incentives and larger prize drawing chances by counting the number of books read. Special programming is also offered in conjunction with the reading program.

3. Knowasis: Thunderbirds Charities Teen Learning Center

The Teen Center will be open during regular library hours. The space will be open to teens and will include:

- 2-3 Study Rooms
- 20 computers (2 catalog-only)
- Non-reservable CD collection (with titles selected by teens)
- Snack area
- Listening stations (for listening to music)
- Graphic novels
- Teen magazines (40 titles)
- Teen fiction books
- Flat screen TV with cable hook-up

Older (and younger) library customers are welcome to enter the Teen Center to select materials, but will not be allowed to stay in the space.

Call Center Circulation Competencies

1. What do I need to get a library card? Photo ID and proof of current residential address (bill, check register, forwarded mail). Details in General Info Brochure and Policy Manual.
2. When are my items due? Go to Circulation Desk icon, enter customer library card number or type N then last name, first name (EX: NSMITH, JOHN), click Checked Out Items tab, and see items and due dates listed.
3. Can you renew my items? Yes, up to three times as long as there are no outstanding holds for the item, you owe \$10 or less in overdue fines and your card is not expired. Click the box in front of the item(s) to be renewed or click the All tab above the boxes to renew all items. (If you see HOLD listed in the Status column of the item, it has outstanding hold(s) and cannot be renewed.) Click the Renew button. The new due date for renewed items will appear under the Due Date column. (You can click the Due Date box to show due dates in order.)
4. Why can't I renew my items online or by phone? Access customer's account (see #2.).

Maybe your card is expired;

- Click the Edit icon at the top of the screen. The Expiration Date will appear at the top left. If expired, verify address, phone number and e-mail. Add birth date and driver's license number if not on account. Update Expiration Date to today's date and one year ahead for non-Scottsdale residents and three years ahead for Scottsdale residents. Just click in the field you wish to update. To add Driver's License number, click insert icon and arrow on pull down menu, select u Driver's License and add number.

there are outstanding requests for the item;

- Click Checked Out Items tab. If you see HOLD listed in the Status column of the item, it has outstanding hold(s) and cannot be renewed.

or you've reached your renewal limit;

- If you try to renew items that have reached the renewal limit, you will get the message "Item has **TOO MANY RENEWALS". Do not OVERRIDE. These materials need to be returned.
5. I'd like to know what fines I have on my account. Access customer's account (see #2.).
 - The total fine amount will actually show on the tab. For details click on the Fines(\$0.00) tab. Titles and fines per item are listed. Highlight and right click, then select View This Fine for fine details.
 - You can view fine history by clicking the Fines Paid tab under Fines.
 6. I received a letter from Unique Collection Agency, how can I clear my account? Access customer's account (see #2.).

- The total fine will show on the fines tab. They can pay by credit card over the phone. You will need to take their credit card number, their name as it appears on the credit card, the expiration date, the zip code and the amount due. (Slips will be taken to the Circulation area for staff to process.)
 - If they are disputing the fines and need to speak to someone, transfer the phone to 22340.
 - In order to checkout items the entire amount needs to be paid.
 - If they want to set up a payment plan, transfer to 22340.
 - Accounts go to collections 48 days after the due date.
7. I lost my library card, what should I do? Bring in your photo ID to access your account, and we will issue you a new card for \$2. We will now place a message on your account and block it:
- Go to Circulation Desk icon, enter customer library card number or type N then last name, first name (EX: NSMITH, JOHN), click the Edit icon at the top of the screen, and click insert icon, then select m Message from the pull-down menu. Type “Library Card reported lost” and add the date and your initials along with your library (ex: 10/13/05 LB/MUS).
 - To add the block to the account, stay in the edit screen, go to the Manual Block field and type L or double click in the field to see the selections, click on LOST/ST. CARD then click OK. Click on the Save/Close disk icon at the top of the screen.
8. I received a notice that a book is on hold for me, but I don't want it anymore. “Okay, we will take care of it, what is your library card number?”
- Access customer's account (see #2), click the hold tab and print out the customer screen with the hold showing. After your time in the Call Center, pull the item from the hold shelf. Access the customer's account, click on the hold tab, check the hold to be cleared and click the Cancel Holds button. Go to Check-In mode and scan item. If it needs to go to another library, you will be given a message.
9. I got a call from your automated system saying I have overdue materials. I know I returned everything to the library last week. “Let me take a look at your account. What is your library card number?”
- Access customer's account (see #2) and click the Checked Out Items tab to see items and dues dates listed. If there are no items listed, they have all been returned. The right-most status column will indicate if materials are in overdue or billed status. If a shelf check was conducted, this will be indicated through a message on the customer's account. You can suggest a shelf check if one has not been done. A printout will need to be made and given to Circulation for a shelf check. Please have the customer call back in 3 days to check on the status of the shelf check. (The customer is called back **only** if the item(s) are found.)
10. I need to know when my ILL (Interlibrary Loan) is due and I need to renew it, can you help me?

Access customer's account (see #2) and under the ILL tab, you can see when the item is due. At this time, we need to refer ILL renewal calls to Sheena (22306).

11. The item I reserved is showing at the wrong pickup location, I need it sent to the closest library to where I live.

Access customer's account (see#2) and either 1) Transfer the call to where the item is located, so they can pull the item and send it to the appropriate location or 2) Print the patron's hold list and contact circulation so they can pull the item and send it to where the item is to be picked up. By checking the item out to a desk card, then going into the item record and changing the pickup location, checking the item in, the item will then be directed to the correct location.

CALL CENTER PRE-ASSESSMENT QUESTIONS

Many of these questions are rather open-ended and can result in further negotiating the reference interview. Some of them do not have any specifically "correct" answer—you may need to find out what the caller is really getting at by asking questions. This is not a test but a tool to see what you need to work on.

- 1. I own a business and want to give a seminar in your auditorium. What do I do?**
- 2. Put me on the reserve list for Hiaasen's latest. I can't remember the title.(How do you limit by date?)**
- 3. Where do I vote?**
- 4. Do you have any 1040s?**
- 5. I need a library card. How do I get one?**
- 6. Where is the list of *Caldecott Medal* winners?**
- 7. When is the Motherhead Workshop?**
- 8. Can you do a criss-cross for me?**

9. The website is asking for my PIN and I don't have one.
10. Can I return my bus pass to your library?
11. Can I bring my 3-year old with my other child to *Time for 1's and 2's*?
12. I have a science fair project due tomorrow. Can you tell me what to do?
13. Will you fax me an article, please?
14. Who are the best doctors in this area?
15. I got an overdue notice but I already returned those books!
16. I'm a teacher and I need you to pull all the books you have on Hallowe'en. I'll be by to pick them up after school today.
17. I reserved The Bear and the Dragon weeks ago but I never got a call.
18. I have to do 20 hours of Community Service and I want to do them at the library.
19. How do I get to your website?
20. The automatic renewal number doesn't work—will you renew my books?

Scottsdale Public Library System

Call Center Post-Assessment

Please answer these questions on your own - do your best - and provide as many answers to each question as you think appropriate. Do not worry about whether you are right or wrong. It is not a "test". You will self-check your answers when complete to access your knowledge. Thank you very much for your participation!

- 1) How can I find the *contact person for Investor Services* at Verizon?
- 2) How do I donate books to the library for my tax deduction?
- 3) Can I read my AOL mail at SPLS?
- 4) I need a chapter book on horses.
- 5) Help! I put a book in the mailbox instead of the book drop! What shall I do?
- 6) My son turned in a school book with his library books.
- 7) Do you have a recording of 'Bali Hai'?
- 8) Can I post my resume to the Internet at SPLS?
- 9) Did Harry Truman really think that Hiroshima was a military base instead of a city?
- 10) Where do I sign up for the SAT?
- 11) How can I get Braille and talking books for my visiting parents?
- 12) When is the next 'Food for Fines' so I can pay my fines off?
- 13) When is the next home delivery? What time? Who will bring my books?
- 14) Do you have AR books?
- 15) Where can I use a typewriter?
- 16) When will you have the next Harry Potter book?
- 17) Should I use Google or Alta Vista?
- 18) My daughter has too many fines. Can I have her card stopped?

Scottsdale Public Library System