
Library Operations Training Course: Circulation, Collections, Patron Service and Records Control

28 June – 2 July 2027
Cape town





Library Operations Training Course: Circulation, Collections, Patron Service and Records Control

Ref: 688_33882 **Date:** 28 June – 2 July 2027 **Location:** Cape town **Fees:** 4800 GBP

Programme Summary

The library operations training course runs for one week for library managers, heads of library services and supervisors of support staff, ending in a library operations control plan for one service point. Circulation, stock and records work is often run by habit, so errors repeat and staff follow different rules for the same task. The programme moves from the service model to circulation, collections care, patron service and records control, using cases from academic, public and corporate libraries. Mars Training Centre UK delivers this programme on library operations to mixed-organisation cohorts.

The Business Case

A library earns trust through small, repeated transactions: an item lent, a book found on its shelf, an enquiry answered, a record kept correctly. When these depend on individual habit, losses grow, users wait and managers cannot show what the service delivers. Written procedures, sampled checks and agreed measures let a manager direct support staff with confidence and show sponsors how the service performs.

- Stock Accuracy: Improves as shelving, verification and missing-item checks follow a fixed routine.
- Service Consistency: Improves as desk staff apply the same loan rules and enquiry standards.
- Record Reliability: Improves as patron and transaction records follow agreed retention and access rules.

Principles and Evidence Base

- ISO 11620 Library Performance Indicators: Provides measures for service, stock and use, and is applied in Sessions 1 and 5.
- ISO 2789 International Library Statistics: Defines what is counted and how, and is applied in Session 1.
- ISO 15489 Records Management: Frames the creation, retention and control of records, and is applied in Session 4.

Intended Participants

- Library managers who are accountable for lending, stock and user service in a single site or network.
- Heads of library services who set procedures and measures for several service points.
- Supervisors who direct circulation desk and shelving staff and check their work daily.
- Information service leads who keep patron and transaction records and answer for their accuracy.

Typical settings include university libraries, public library networks, corporate information centres and government reference services.



Learning Outcomes

1. Participants will be able to diagnose weaknesses in the daily operation of a library service point.
2. Participants will be able to construct circulation procedures that treat lending, returns and holds consistently.
3. Participants will be able to evaluate stock condition and select the checks that keep a collection findable.
4. Participants will be able to justify patron service standards and complaint routes with evidence from enquiry records.
5. Participants will be able to prioritise the records to keep, restrict and dispose of under a retention schedule.
6. Participants will be able to design a library operations control plan that a supervisor can apply from the next working week.

Programme Structure

Day 1: Library Operations and the Service Model

Which tasks, roles and measures define a well-run library service point?

- Service Point Task Inventory
- Role and Rota Map
- Library Performance Indicator Set
- Statistics Collection Sheet
- Operating Risk Register

Day 2: Circulation and Access Services

How are lending, returns and holds handled in the same way by every member of staff?

- Circulation Desk Procedure
- Loan Rules Table
- Holds and Overdue Handling Flow
- Exceptions and Waiver Log
- Closing Count Checklist

Day 3: Collections Care and Stock Control

How is stock kept findable, safe and current?

- Shelving and Shelf-Reading Routine
- Stock Verification Sample
- Damage and Repair Triage
- Withdrawal Criteria Sheet
- Missing Item Investigation Form



Day 4: Patron Service and Records Control

How are users served fairly and their records kept accurate and protected?

- Patron Service Standard
- Enquiry Handling Script
- Complaint Response Path
- Records Retention Schedule
- Patron Data Access Rules

Day 5: Library Operations Control Plan for One Service Point

Do the task, circulation, stock and records documents form one plan the supervisor can use?

- Applying the Session 2 Circulation Desk Procedure
- Testing the Session 3 Stock Verification Sample
- Reviewing the Session 4 Records Retention Schedule
- Checking the Session 1 Library Performance Indicator Set
- Completing the Library Operations Control Plan

Methodology

The programme uses a structured exercise method built on a shared case of a mid-sized library with uneven lending practice, untested stock and mixed record keeping. Participants work through prepared loan data, shelf samples and enquiry logs, then adapt each tool to a service point of their own.

- Suggested activity: Tracing a loan, a hold and an overdue item through the desk procedure and correcting the gaps.
- Suggested activity: Drawing a shelf sample, counting the mismatches and ranking the likely causes.
- Suggested activity: Applying a retention schedule to a mixed set of patron and transaction records.

Capstone Output

Each participant completes a library operations control plan for one service point. It holds a task inventory, a circulation procedure, a stock verification routine, a patron service standard and a records retention schedule. The plan is used at work to brief support staff, set weekly checks and report results to the sponsoring manager.

Frequently Asked Questions

Is library operations training suitable for supervisors without a library qualification?

Yes. Library operations is taught through exercises and templates, assuming some experience of library or information service work but no formal qualification in library science.



Which standards does library operations training rest on?

Library operations training rests on ISO 11620 library performance indicators, ISO 2789 international library statistics and ISO 15489 records management.

How is the plan from library operations training used at work?

You use the library operations control plan to brief support staff, set weekly checks and report results to the sponsoring manager.

How does library operations differ from library collection development training?

Library operations centres on daily lending, stock care, user service and records, while library collection development training covers selecting, acquiring and budgeting for new material.