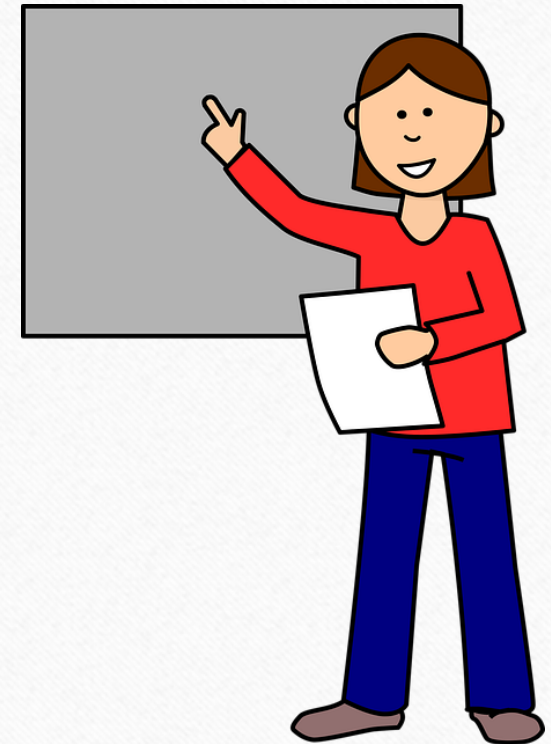# How To Develop a Training Checklist

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What We will Discuss

- Benefits of a Training Checklist

- Developing a Checklist

- Training with the Checklist

- Reviewing with the Student

- Updating the Checklist

- Questions and My Checklist

Benefits of a Training Checklist

- Keeps you on task

- Training is consistent for each employee

- Breaks down training into manageable chunks

- Others can help with the training

- Keeps track of their progress

- You can have the trainee decide when they know a topic

Developing the Checklist

- Brainstorming

- Grouping into Subjects

- Create Manageable Steps

- Structuring

Brainstorming

- Write down what is obvious

- Walk around the department for ideas

- Walk around the library for more ideas

- For a week: add more topics as you find them

- Ask others in the department to review your list and add more topics if needed

Grouping into Subjects

- Review your list and start grouping items together under similar topics

- Try to have groupings of 15 or less items

  - My average is 6

  - My smallest is 1

  - My largest is 12

Public Dealings
Answering the phone and taking messages
Special phone features: transferring calls, hold, & call pick up
Library Handouts (display)
Giving directions
Fielding questions
College catalog: online & in print
Lost and found: turn in to Oakton Police
Public catalog - DP: computers; RHC: iPad
Helping students access PrintWise to add money to their account

My Groupings

- Advanced Check-Out
- Basic Check-Out
- Check-In
- Library/Owl Cards
- Library Website
- Machines
- Mail
- Opening/Closing
- Paperwork
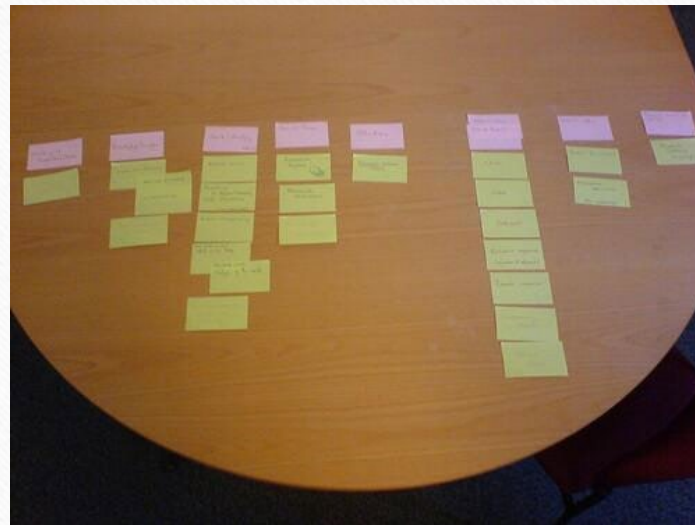
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- Problem Solving
- Projects
- Public Dealings
- Reserves
- Shelving
- Straightening
- Tours
- Upkeep of Stacks

Create Manageable Steps

- Review each topic and break it down into smaller steps for clarity
- You may need to split your topic into two or more once this is done
- Organize into chronological order, if possible

| Basic Check-Out |
| --- |
| Logging in to the computer |
| Manage Patron Services |
| Scanning card and item |
| Checking due date and stamping |
| Desensitize |
| Hold shelf |
| OCLC interlibrary loan: confirm patron expiration & no fines or blocks |
| Renewing |
| Kits |

Structuring

- One column for each: subjects & topics, Shown, and I Know

Opening/Closing	Shown	I Know
Go over checklists		

- I don't recommend numbering the topics in each group

- Don't let grouping split between pages (add page breaks)

- Organize the topics in the order of importance (mostly)

- Add "Last Updated <date>" at the bottom

- Add space to the top of first page if you will store the lists on a clipboard

Training with the Checklist

- Multiple people can train: they can pick which topic they are comfortable teaching

- Place the lists in an area everyone can access

- Go one topic at a time

- Mark "Shown" once a topic is covered

- Add topics you missed, cross out ones that are no longer relevant, and add notes as needed
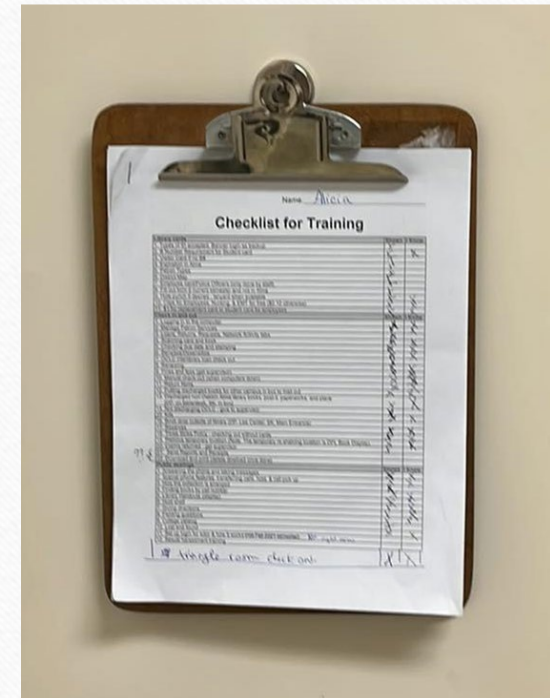
Reviewing with the Student

- Give to the student to review regularly and tell them to:
  - Mark the things they feel confident they know
  - Ask you about the things they aren't confident about
  - Once you retrain them on that topic, they get to decide if they can mark it "I Know" yet
- You review the checklist regularly to note their progress and make sure the training is completed

I Know

Updating the Checklist

- Use the notations on the training lists to update your template:
  - Take out obsolete items that you crossed out
  - Reword things that were not clear
  - Add things you that were missing during training last time
- Update "Last Updated <date>"
- Review the list once a semester and/or during the hiring process

Shown	I Know

Last Updated 2/21/2023

Questions & My Checklist

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