

What Would *You* Do?

ILL Best Practices for Worst-Case Scenarios

Tom Bruno and Collette Mak
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Go Tell It on the Mountain

Grad student Inera was feeling so inspired by the book she borrowed that she left it on a mountain top in tribute. ARGH. Now she wants to borrow it again.



Questions

- WHAT WAS THE TITLE OF THIS BOOK?
- NO, SERIOUSLY- I NEED TO KNOW WHAT THIS BOOK WAS ABOUT
- ACK! THIS MAY BE THE MOST IMPORTANT BOOK OF ALL TIME,
**WHY O WHY DON'T WE KNOW THE
TITLE...?!?**

Where we're going, we don't need rules...

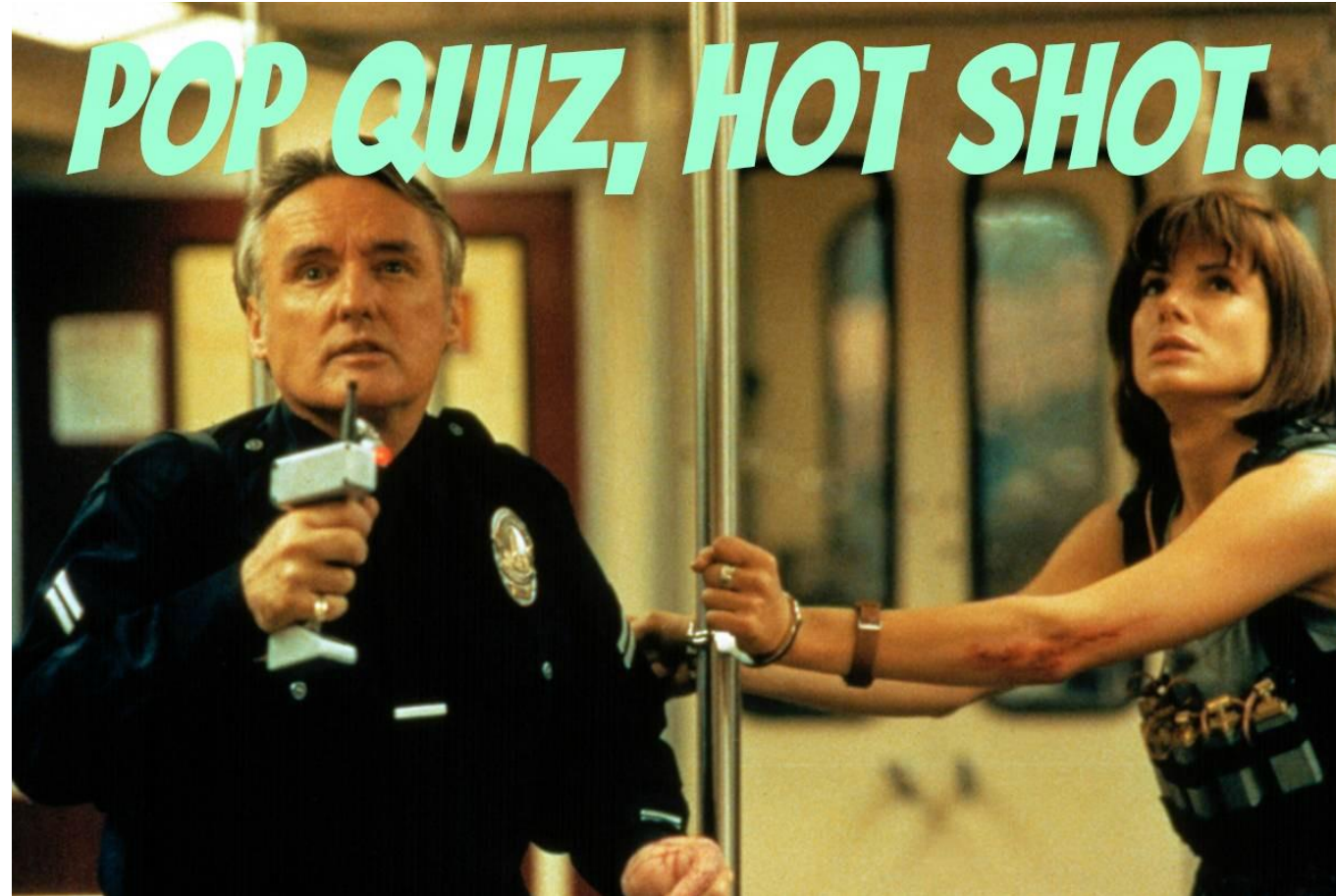
- ILL training is very workflow-intensive and rules based
- When disaster strikes, your normal policies/procedures may not be able to address the situation
- Nevertheless you can still be prepared!



Presentation Overview

- Case studies and lessons learned-
(from Tom Bruno, Collette Mak, and the ILLers Facebook Group!)
- Disaster Planning 101
- Share your own Worst Case Scenario

WARNING: Audience Participation Required



Today's Goals

- Learn to anticipate the unexpected- i.e., some of these scenarios are more common than you think!
- Don't be afraid to share your failure and turn it into a learning opportunity
- What is the most important ILL emergency supply?



Is it duct tape? IFLA vouchers? Jiffy bags?
THE SUSPENSE IS KILLING ME!

Sharing is caring, right?

- Okay, most of you are here for the Schadenfreude
- We're OK with that
- Just don't laugh too hard while the rest of us are crying...



Back to the mountaintop...



On the other hand, this terrible fate was avoided...

- Library billed patron for the lender's replacement charge
- In retrospect, should have seen if a used replacement copy would have sufficed
- Borrow again for the patron? Maybe purchase a library copy so patron is more accountable
- Ended up borrowing again but making patron pick up at ILL office (so expectations could be stated i.e. "Don't do that again" 1:1)

Lessons Learned?

1. Collette sez: “Flakes Happen”. They’re still your users and you need to serve them, but you need to serve them in a way that maintains ALL the relationships—including the one with the lender.
2. If you can make it a local issue by buying a copy for your library, then that’s the best approach.
3. One does not simply walk into Mordor. Wait, wrong presentation!



Welcome to your job, here's your first international incident!

- True story- only a few months into my tenure as Head of ILL at Harvard College Library we got a series of angry letters from the National Diet Library of Japan
- We'd lost one of their books in return transit, and the author who had donated it to the NDL was apoplectic
- Not only did we have to pay a lost book fee, but we also had to write a formal letter of apology to the professor whose book we'd lost!

Anyone here from the NDL?



Yes, I'm still sorry!

Lessons Learned?

- Ship all items via a trackable (and preferably insurable) service
- This is especially true for international ILL
- Borrowing returns are just as important as your own loans
- Items can and will still get lost in transit, but at least you will have information— such as tracking information— to follow up on quickly and in a professional manner
- Understand and acknowledge cultural differences when dealing with disaster

Prison Break, Interrupted



FUN FACT: The Atlantic City Free Public Library has a collection of vintage/historical Monopoly games in its Heston special collections!

You don't pay much attention to the failed jail break on the news until you find out that you lent a book to that prisoner.

The entire contents of the cell have been taken in evidence.

That book is in the evidence locker and it's not coming back any time soon.

Lesson Learned?

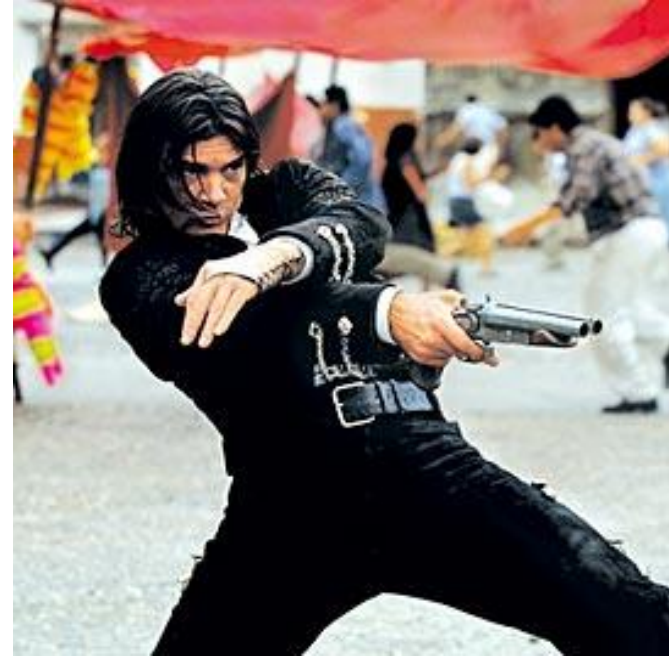
- While the ILL Code may be clear, certain extenuating circumstances might want you to be more lenient
- In this case, we didn't want to punish the prison library
- Having dedicated money/funds in the budget for lending replacement costs is a VERY VERY GOOD THING
- Branch libraries felt better about international ILL loans if ILL office is willing to foot the bill for a replacement copy

Collette sez!

“When you lend a book sometimes it won’t come back. The same thing happens with your own patrons so don’t get your knickers in a knot over it. When it’s something extraordinary like a freakin’ JAIL BREAK be kind to the borrowing library.”

Once Upon a Time in Mexico

- I get a call from our FedEx Dispatch, informing us that there is a problem delivering a package to an address in Mexico
- FedEx Mexico wants to know “if it’s okay to destroy it”
- WTFBBQIFLAOCLCIDS?



Disclaimer: This may not have actually happened

Hey, I thought it was just me...

- Kurt says: “Australian border patrol burning our materials because the deliver to address was wrong. I know they have to be super cautious about invasive species but 30 days of an undelivered book seems a bit over the top. Fire bad!”
- Jen says: “Similar experience to Kurt’sss but it was Canadian border patrol and 12 books!”



Lessons Learned

- Get the address right- most commercial shipping companies will assess a penalty fee for address correction
- Get the address right, Take Two- shipping companies follow different protocols for undeliverable items, or may lose them entirely
- Get the address right, Take Three- provide a positive ILL experience for an International Borrower and you foster the resource sharing ethos on a global scale
- Also, they won't burn your stuff (thanks for Kurt and Jen for sharing- it never occurred to me that they would destroy the packages because of invasive species concerns!)

FIRE BAD! (Hmm, I'm detecting a theme here)

You know you're dedicated heart and soul to resource sharing when you hear about a house fire at a faculty members house and your first thought is "oh no, they borrow a lot of books on ILL!" And yes, the several books they have out on ILL went up in flames along with your own library's books and even some from the public library.



Lessons Learned

- Library paid for replacement for ILL books, did not charge the faculty member
- Library also forgave fines for its own material AND paid public libraries for their lost books as well
- Did this again for a graduate student who had an apartment fire
- Collette: “Ultimately this is a relationship business. You want to maintain the relationship with the lender and do right by them but you also want to maintain your relationship with your community. Charity starts at home, folks. This goes back to my mantra about how ILL is a back-room production operation that has to look like a boutique service to your users.”

What, they don't take IFM?

- Student doing research on the violent anti-abortionist movement was trying to locate copies of a particular organization's book
- Self-published item, only available through org's website
- No libraries own the material, so purchase is the only option- patron does not want to be on this org's mailing list
- How does library acquire item in a manner that preserves patron's anonymity and avoids accidental endorsement by the library?

Lessons Learned?

- I didn't do a good job with this one— instead, I got lucky and the patron decided she didn't really need this book for her thesis
- What could have I done in this situation?



Unfilled at any speed?

June: “The worst that ever happened to me was when our campus mail delivery golf cart ended up in the pond in front of the library while caring ILL materials. It was a job to figure out what was lost and to contact all the lending libraries to request invoices for the water damaged materials. We also had a lot of back end time spent figuring out which ILL materials of ours were being returned so that we could update the status in OCLC.”

Kristin: “Pick up truck carrying our in-state courier deliveries had a tailgate failure and books flew out all over I-35”

Angela: “State consortia courier decided to ignore the "low bridge" signs...in the rain. Lots of waivers came out of that.”

Megan: “I still talk about the time the UPS truck caught on fire!”

Needs more Yakety Sax!

<https://www.youtube.com/watch?v=ZnHmskwqCCQ>

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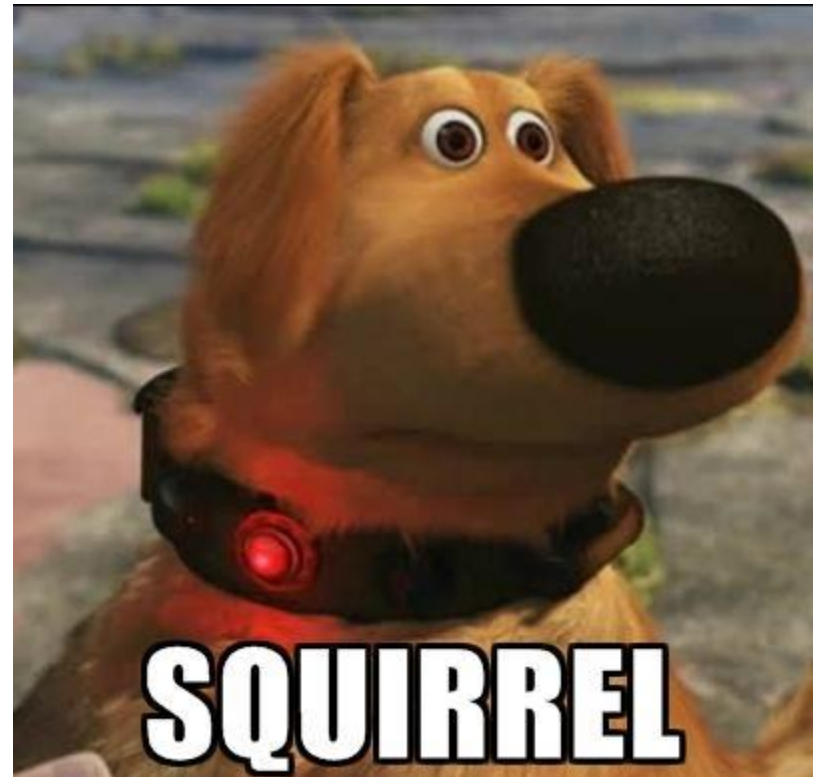
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Disaster Planning 101

- Does your library have a disaster plan?
(<https://www.nedcc.org/free-resources/dplan-the-online-disaster-planning-tool>)
- Does your ILL unit have a disaster plan?
- These things are not necessarily the same!
- ILL Disasters can happen remotely– e.g., UPS Trucks which mysteriously burst into flames, or squirrels getting into the server closet for your consortial borrowing platform (yes, that happened)



...and don't forget to bring a fire extinguisher!

- Track your shipments, down to the item level/barcode if possible
- Work with Preservation or Conservation staff so you have an action plan for books damaged by water or fire
- If you are delivering items within a consortium, agree on a written protocol for missing, lost or damaged books
- In case of a larger service disruption, articulate a plan for maintaining collections access or service levels

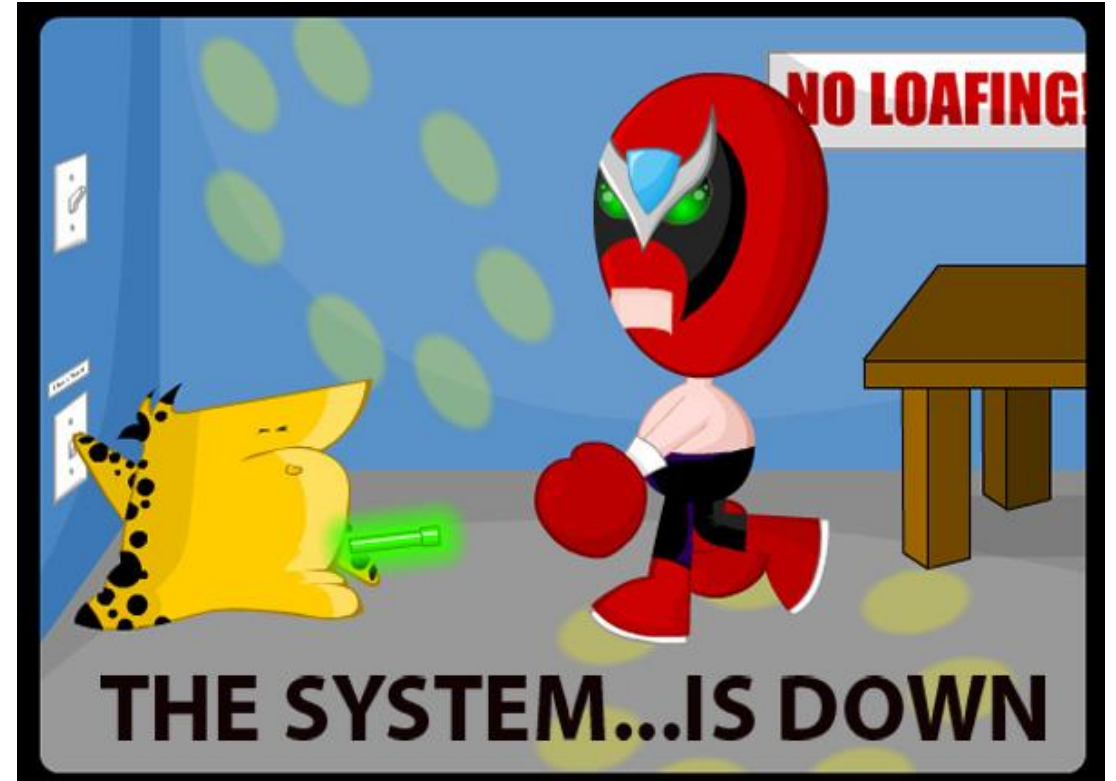
Après l'incendie, le deluge...

- In 1997, Colorado State University's Morgan Library was flooded
- Over 500,000 volumes destroyed
- Library staff created ad hoc article delivery service to meet researchers' needs
- This service is now known as RapidILL, with 500+ members worldwide



Lending Workflow Triage Example

Min: “About a month into the then-ILL Supervisor's maternity leave (wherein I am the only person left in the library with any ILL experience), our ILL server suffered a catastrophic failure. Because I wasn't a supervisor, I wasn't in on the meetings to decide what would happen. I spent the first week waiting for an ETA on how soon we'd be back up, all the while watching requests arrive and expire in FirstSearch (the only interface I could use to view anything). I did a lot of conditionalling that week. When they finally decided that it wouldn't be fixed anytime soon, I was finally able to put our symbol down. Then I had the fun task of figuring out how to process all of the waiting incoming loans and returns. Yay! Oh, and, it goes without saying that there were no ILL requests going out in the meantime so our students were not happy. We were down for something like a month. Clean up when we came back up wasn't as bad as it could have been, thank goodness!”



And on the Borrowing side... a wedding catastrophe!

“Are you married?”

“Am I not a man? And is not a man stupid? So I married. Wife, children, house, everything... the full catastrophe!”

- *Zorba the Greek*



Lessons Learned?

- Disaster planning is not always about events
- CONTINGENCY PLANNING IS DISASTER PLANNING
- Many organizations are unwilling/afraid to do contingency planning because they may entail additional personnel costs or red tape with library administration or HR
- ***For every dollar saved, there is a service cost!***

TIME TO SHARE!



The End of the Lending String As We Know It

- Earthquake
- Birds and snakes
- Aeroplane
- Genie Powell is not afraid

Don't forget the Pixie Dust!

“If there is one certainty in customer service, it's that something will go wrong. But the way you deal with problems is what can separate you from your competition.”

- Disney Institute

<https://www.trainingindustry.com/media/3998204/disneycustomerloyaltyqualityservicelessons.pdf>



Yeah, but does Mickey Mouse catch on fire?

1. Understand the difference between customer "needs" and customer "wants"
2. Make sure the process supports employees, customers, and financial results
3. Allow employees to be flexible
4. Continuously improve the process
5. Always pay attention to the secondary guest

Questions? Comments?

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and Reserves

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(Pictured: My own personal
#ILLiad15 packing disaster!)



And don't forget my partner in disaster!

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aka High Priestess of the Pivot Table!