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Cross Training Your New Hires, Doing It ALL: Borrowing, Lending, and Local Document Delivery. Yes They Can!

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Abstract:

Texas A&M University Libraries' Document Delivery Services is responsible for interlibrary loan and in-house document delivery services for our campus of 65,000 customers. A team of 10 FTE staff members, including the director of the department, processed about 156,000 requests in 2015 (74,278 lending requests, 54,032 borrowing requests, and 28,064 in-house document scanning/book on hold retrieval requests).

In the summer of 2015, two of our employees (one in lending and one in in-house document delivery) left the department, citing family reasons and professional promotion opportunities. When we advertised the two newly vacated positions, we revised the position descriptions - instead of focusing on only one aspect of operation, we decided to train our two new hires on all three functions, namely, borrowing, lending, and in-house document delivery.

This presentation will show the audience strategies we employed to train the two new hires, what we learned from this experiment, and how they felt about the training and their workload. Their daily responsibilities now involve in all three functions.

Department's overall improved workflow, each individual staff member's, including students' responsibilities, will also be discussed and training examples will be shared.

Keywords: Cross Training, New Hires, Interlibrary Loan, Document Delivery, Workflow

Texas A&M University was the first public institution of higher education in Texas, founded in 1876 as a land, sea, and space grant institution. It boasts the third highest undergraduate enrollment in the United States (47,039) and the largest enrollment in Texas, according to the 2015 U.S. News & World Report.

Texas A&M University (TAMU) Libraries is the first library in the nation to offer *free* local document delivery and interlibrary loan services to its entire campus of customers, including undergraduates, graduates, faculty and staff members. This service has been provided since 2002. Our mission, as the one might surmise, is to "get it for you," no matter where the material resides, be it in our own collections or anywhere in the world (Yang 2012).

The Document Delivery Services department of TAMU Libraries is responsible for interlibrary loan, book retrieval from library stacks for customers to pick up, and local collections scanning for our campus of over 65,000 customers. The department used to have 13 team members - five for borrowing functions, three for lending, three for in-house document delivery, one professional staff supervisor, one director of the department, and eleven student workers (3 FTE). In 2010, we peaked in terms of number of requests received, processing a total of 235,754 requests. Since 2011, we have seen decrease in all three functions (borrowing, lending, and document delivery). In 2015, we received just 156,000 requests (74,278 lending requests, 54,032 borrowing requests, and 28,064 local book retrieval and scanning requests), a 34% decrease from 2010 (Figure 1). Because of the downward trends in requests, I eliminated three positions (two in borrowing, one in in-house document delivery) after they were organically vacated due to a retirement, promotion to another library department, and resignation to attend graduate school between 2011 to 2014. On average, we now handle and process about 1000 requests/items daily. The decrease in requests might be contributed to our robust electronic resources, which allow users to find fulltext online themselves; the implementation of demand driven acquisition; the installation of scanners on every single floor of the library stacks; and the improvement of our discovery services.

In the summer of 2015, another two staff members resigned, one of whom previously held a position in lending, and another in-house document delivery. Already running a lean team, I did chose not to eliminate these positions. Instead, I used their departure as an opportunity to establish a new staffing model. When I hired two new replacement team members, I decided to train them in all three functions of the department, rather than focusing on only one area. There are many benefits for crossing training, including (but not limited to): consistent productivity even when employees are absent; combating employee boredom; spreading employees' understanding and capabilities over a wide range of skills and tasks; and building empathy amongst team members for their colleagues. Providing employees with varied work typically results in increased productivity and satisfaction.

In mid-August of 2015, we hired two new staff members. On their first day of work, we explained why we love our job. Our department is regarded as the most valued and vital library services in the eyes of our customers. We enjoy the detective work and resulting satisfaction of tracking down a resource. We don't compete - rather, we share, help, and cooperate. Seeing an item coming from South Africa/Australia/Hong Kong makes the world seem smaller. We are in

touch with users' real needs and make a difference in their lives. The articles/books that we deliver enable our students to complete their assignments/thesis and our faculty to make breakthroughs in their research efforts or secure their grants. After this pep talk, the supervisor gave them a list of job tasks performed by the department staff members (about 70 tasks), not to overwhelm them, but to give them an idea of what they will expect to learn. They were asked to submit a request as a user to our Get it for me system (our brand name for ILLiad). This would help them understand how the requests came to the ILLiad client as they started to learn to process them. The supervisor also asked them to read FAQ page of the Get it for me. This would inform them our service coverage.

They were trained on borrowing processing first, focusing on two tasks: sending requests to other libraries to be filled and electronic delivery of articles found in TAMU Libraries databases and online resources. During the first week, the supervisor spent two to three hours every day, sitting next to them, watching them process each request and answering questions along the way.

Figure 2 is our ILLiad borrowing module front page. Each staff has their own specific task underneath their name (Figure 2). The reason I group this way is, for example, if Bobbie were out for the day, the backup staff would just take care of the requests in the queues underneath Bobbie. Each task has at least one back up person.

Attention to detail is the key for our job. When we trained new staff members, we stressed that they need to check the following: does the patron indicate if he/she will accept other editions, or non-English editions? What are the format needs of the requested item - print book, audio book, ebook, or CD/DVD? Is there any note left by the patron in the note field? If it is a rush request, we need to call the lending library to alert them and put the word "rush" in the borrowing note field. For article requests, staff members were instructed to Google the article first to find open access PDFs freely available on the internet. We showed them the power of keyword search in OCLC and handed them key MARC fields descriptions reference sheet we prepared (Figure 3). We found searching on the ISBN or ISSN in OCLC is quicker, but a title search will bring more results depending on the complexity of the request.

In week two, they were trained on lending processing. They had a tour of the library stacks, learned the library layout, the call number structures, and the locations of the re-shelving areas for each floor. We talked about our consortia group, priority processing for our consortia members, and informed them that in the case of a bad citation, not to unfill it, but to condition it and ask the borrowing library to check the citation. If we unfill it, the request will continue to the next library without being filled, a waste of time for all parties involved. We shared with them some OPAC search tips. They were instructed to print pull slips for stacks search, learned packaging, organizing received items, document scanning, and sending shipments via FedEx and TExpress (our state courier). We emphasized that when we return items to the lending library, to include the paperwork that was sent along with the item to help the lending library check in when they get their loan. We talked about our licenses for interlibrary loan, such as per our contract with Elsevier, which forbids us to send copies of articles from its packages to libraries outside of the United States.

During the second week, they learned lending process and spent about two hours every day on borrowing requests processing so that they wouldn't forget what they had learned the week before.

On the last day of week two, moving over to our Document Delivery module training was a smooth sail. They only needed to learn how to create a hold record in Voyage circulation module, as we retrieve books from stacks for our patrons, which requires us to place a hold record in Voyager and have our customers pick up. They were instructed to print pull slips, update stacks search for loans, and scan/update documents for electronic delivery.

Starting from week three, the two new hires were on their own. We saved the screen shots during the training, they used those to refresh their memory, and they also took extensive notes for reference. A copy of processing procedure to follow was provided to them during the training, but later they realized that taking notes enabled them to reinforce the learning, so it is better to have new hires take the notes during the training session rather than just give them the process procedure documents. When they ran into any uncertainty, they asked other staff, or pinged their supervisors or myself. Whenever I saw a request that was out of norm, I would explain how I processed it, sometimes asking them to show me how they would tackle the request. We talked about copyright law, custom holdings, and patron privacy. They had a solid four months of practice after the initial training.

In mid-December of 2015, I sat down with each of them and checked their progress. They both did a fantastic job. I then showed them how to process the following tasks: awaiting copyright clearance, awaiting renewal request processing, awaiting denied renewal processing, awaiting odyssey delivery; awaiting SFX requests processing, and using OCLC blank work form to submit a request.

With the hands-on experience they'd gained over the previous four months, it took less than 30 minutes to complete the above training. We decided that after the holiday, in the spring semester, they would be trained on the following tasks: borrowing unfilled and conditional requests processing, lending conditional request processing, lending renewal request processing, lending unshipped, and OCLC special message: complete, not received, borrowing incoming books processing, prepare items for faculty/staff office mail stop delivery and branch library delivery, using FedEx to ship books to distance education student's home, and checking in borrowed returned books from faculty and distance students. Overall, it took them about eight months to feel comfortable in handling all the tasks.

Their daily responsibilities include processing incoming requests in all three modules and they fill in for staff absence seamlessly. After the initial overwhelming feeling, a semester later, they feel much less stressed and have begun to feel better-rounded in their abilities within the department as a whole. They are very receptive and appreciative for this model, because work is very varied, they get to do many different things instead of focusing on only one thing all day. They are able to learn many of the department processes through incremental instruction.

This model was put to test when unexpectedly, one staff member whose responsibilities were solely in lending resigned in mid-February of 2016. Another lending staff was out for the entire

week at the same time for a pre-planned vacation. The two new hires just shifted and balanced their focus, giving more attention to lending in their daily work activities. It worked out just fine with no extra burden felt by other staff. I decided to use the same model to train the 3rd new hire who started on May 1st, 2016.

This model also earned the support from my existing staff members. They commented that we developed a larger pool of employees who can step in when department is short-staffed. Now each task is covered by at least five staff members. All tasks can be carried out throughout the day. We used to process books in the morning, because books are usually delivered around 2:00 pm. The staff whose main responsibility is to process incoming borrowed books leaves at 3:00 p.m., so we used to process books the next day. With this model, we now process some of the incoming books in the afternoon too. This model breaks away from the traditional big resource sharing/document delivery department's practice, where the natural tendency is to have specific staff attend to their specific responsibilities.

In short, this model paid off. The new hires developed a clear understanding and appreciation for the interconnection of the department services. They are more confident and self-reliant with broader skill set. Department dynamics have been improved. Turnaround times have improved by .5 days for borrowing and 1 full day for lending.

Training is ongoing for all of my staff in my department. When staff could not find a resource, they would route the request to my queue. After I found them, I would talk to that person and show him/her how I found it. At our monthly staff meeting, we identify information gaps, we talk about commonly made mistakes spotted in processing unfilled requests. We look at different databases TAMU Libraries subscribe to that we use heavily to help us verify citation. Our new hires applaud the support from co-workers to help them understand a process, clarify mistakes, and show faster and more effective ways for some processes. It was truly a team effort to bring them up to speed.
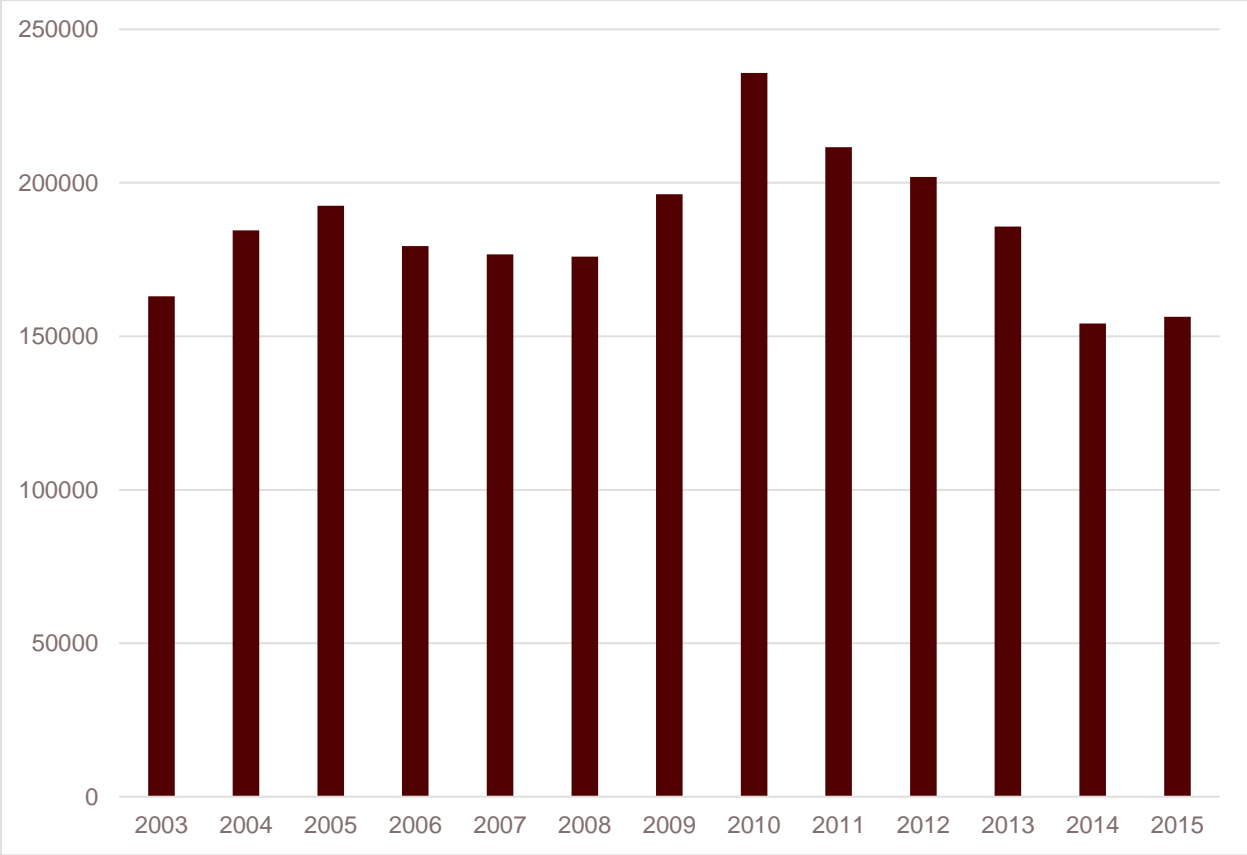
Figure 1: Yearly Total Requests Received from 2003 - 2015

Figure 2: ILLiad Borrowing module front page

010: Library of Congress Catalog Number (LCCN: 12-345678)

020: International Standard Book Number (ISBN: 0123456789)

022: International Standard Serial Number (ISSN: 1234-5678)

030: CODEN (ABCDEF) - assigned by Chemical Abstracts Service

037: Source of acquisition - NTIS and ERIC documents microfiche

050: Library of Congress call number

082: Dewey Decimal call number

086: US Documents classification/call number

100: Personal name/author

110: Corporate name

111: Meeting/Conference name

210: Abbreviated title

245: Title

260: Publication place, company, & date.

300: Physical description - book.

362: Dates of publication/sequential designation - serials

440: Series title

502: Dissertation/thesis note

772: Parent record entry - for supplements and single issues

776: Additional physical form entry merged with alternate title

780: Preceding bibliographic record - serials

785: Succeeding bibliographic record - serials

Figure 3: MARC fields descriptions

Acknowledgments

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