



MORRIS LIBRARY

TRAINING PLAN 2018

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Executive Summary

Overview

This training will serve library staff who work directly with patrons who may be angry, aggressive, or otherwise upset. Specifically, this training will prepare employees to deescalate potentially dangerous or unpleasant situations with upset patrons.

Who

This training will be primarily for employees who work directly with patrons, including but not limited to Circulation and Reference staff. This is a diverse group of employees, ranging from experienced librarians to undergraduate student workers. Staff are well-trained in using library resources, but are rarely given communication/ soft skills training.

Rationale

Ann Curry (1996) has already identified that staff training is one of a library's best defense techniques against problem patrons. By training staff on what causes problem patron behavior and how to handle it efficiently, fewer incidents will escalate to the point of extreme harshness or violence. According to Jennifer A. Dixon (2016), there should be designated time within this training to listen to staff comments, suggestions, thoughts, and ideas, as library staff members are more familiar than anyone else on types of problem patrons and incidents they experience. This training has time built in for these types of discussions.

According to C. Lyn Currie (2002), librarians should understand what constitutes a problem patron, and whether or not his or her behavior is actually problematic or harmful rather than just in violation of normal or expected patron behavior. In addition, Steve Albrecht (2015) discusses ways for librarians to adapt their techniques to match and hopefully prevent problem behavior, by preventing patrons from becoming upset. Training will draw on these ideas, focusing on understanding and preventing problem patron behavior rather than just managing it.

Because it is impossible to prevent all problem patron behavior, this training will also prepare staff to safely handle and deescalate potentially harmful situations with upset patrons. Both Rhea Joyce Rubin (1990) and Gina Martinez (2012) advise listening to and acknowledging patrons' problems as an important step in problem patron management. Rubin (1990) specifically suggests active and sympathetic listening as well as breathing exercises, while Martinez (2012) recommends monitoring both body language and tone of voice while helping upset patrons. Many of these skills will be incorporated, as well as non-violent communication and de-escalation techniques. The training session will be approximately two hours long.

When

This training will take place in the weeks leading up to the fall 2018 semester, giving staff enough time to learn, absorb, and practice the training material before the initial rush brought on by a new school year. The proposal pitch will take place on **May 1st, 2018.**

Where

This training will be delivered in a small conference room within the library. Presentation technology including a computer and projector will be utilized; however, attendees of the training will not have computer access beyond their personal devices.

How

This training will involve elements of lecture, discussion, demonstration, and role play. The trainer will be prepared to listen and collect information from library staff about their specific training needs on this topic, answer questions, and lead group activities. Training will primarily be done live and in-person, due to an already high level of online required training expected of library and university employee.

Task Analysis

- I. Listen to patron requests.
 - A. Listen without guessing or assuming the nature of the request.
 - 1. Don't interrupt.
 - B. Listen to entire request.
 - 1. Take notes if question is complex or involves specific details.
 - 2. Don't mentally plan your answer before request is completed.
 - C. Use active listening techniques.
 - 1. Maintain eye contact.
 - 2. Give patron undivided attention.
 - a. Set aside work you may have been doing before receiving a question.
 - b. Avoid taking new questions from other patrons if possible.
 - 3. Show patron you are listening.
 - a. Nod and use facial expressions.
 - b. Offer small verbal responses (yes, uh-huh) to demonstrate understanding.
- II. Ask clarifying questions.
 - A. Paraphrase or summarize patron's question.
 - B. Ask patron if your understanding of their question was correct.
 - C. Ask follow-up questions needed to answer.
 - 1. Clarify patron's status (member, student, etc.).
 - 2. Ask for details about class assignments.
 - 3. Ask about patron's interest or familiarity with topic.
- III. Analyze patron situation.
 - A. Ask yourself if you have all the information you need from the patron to help them.
 - 1. Ask additional clarifying questions if needed.
 - B. Evaluate if you will be able to fulfill the patron's requests.
 - 1. Do you offer the services or materials this patron needs?
 - 2. Will the patron be able to access them?
 - C. Mentally formulate answers or solutions to patron's problems.
 - D. Note patron's emotional state.
 - 1. Identify unsaid or underlying needs the patron may be having.
- IV. Address patron problems and needs.
 - A. Verbally answer patron's question or concern.
 - 1. Explain both content and reasoning for answers.
 - 2. Offer to walk patrons to materials or demonstrate services.
 - B. Offer patron additional help related to their question.
 - 1. Are there services they did not specifically ask for that may be useful to them?
 - C. If patron had a comment or concern rather than a question, let them know you've understood their message.

1. Thank them for bringing their concerns to your attention.
2. Ensure them that their concern will be handled.
 - a. Explain specifics if needed.
- D. Offer empathy if answer is not what patron will want to hear.
 1. Let patron know you're sorry you won't be able to meet their needs.
 2. Let patron know why you won't be able to meet their needs.
 3. Offer sympathy to patron's situation.
 4. Offer alternative possible solutions or options for patron.
- V. Maintain composure and safety.
 - A. Stay calm.
 1. Do not take it personally if patron becomes upset or annoyed.
 2. Take deep breaths if you're frustrated, nervous, or annoyed.
 - B. Do not respond if patron makes emotional comments, other than to offer understanding.
 - C. Maintain physical distance from patrons.
 1. Do not touch patrons.
 2. Do not allow patrons to cross tables or desks separating you.
 - D. Keep conversations in public, visible locations.
 - E. Seek help if needed.
 1. Call on another coworker to answer or confirm your answer to questions.
 2. Offer contact information of other person or organization that may be able to better help patron.
 3. Call emergency services if patron becomes dangerous or violent.
- VI. Close patron conversation.
 - A. Ask patron if you've satisfactorily answered their question.
 - B. Repeat previous steps if more help is needed.
- VII. Report patron behavior or problems if necessary.
 - A. Alert supervisor or security if patron was inappropriate or dangerous.
 - B. Consider disciplinary actions against patron if needed.
 - C. Consider improvements that be made to policy or services to prevent future issue

Trainer's Guide

Learning Objectives

After the training session, trainees should be able to:

- Implement active listening techniques in their everyday interactions with patrons
- Explain common causes of problem patron behavior
- Adopt de-escalation techniques when working with an aggressive or upset patron
- Respond to patron aggression calmly
- Define problem patron behavior and evaluate what kind of patron behavior is unacceptable

Training Schedule and Plan

Timing	Activity
8:00 AM (5 Min)	Welcome and Intro
8:05 AM (5 Min)	Review Objectives
8:10 AM (15 Min)	Discussion: Problem Patron Experiences
8:25 AM (10 Min)	Lecture: Definition of Problem Patron
8:35 AM (10 Min)	Lecture: Active Listening
8:45 AM (20 Min)	Activity: Practice Active Listening
9:05 AM (10 Min)	Activity: Debrief
9:15 AM (10 Min)	Lecture: De-escalation
9:25 AM (15 Min)	Activity: Roleplay De-escalation
9:40 AM (10 Min)	Activity: Debrief
9:50 AM (5 Min)	Lecture: Policy Review
9:55 AM	Wrap Up Discussion

Training Curriculum

Slides	Notes
<div data-bbox="300 478 828 674" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>WORKING WITH PROBLEM PATRONS: PREVENTING HARM AND IMPROVING SERVICE</p> </div> <p style="text-align: right; font-size: small;">Ellen Lechman</p>	<p>Welcome and Intro</p> <ul style="list-style-type: none"> • Set-up room and slides before trainees arrive. • Greet participants using active listening. <ul style="list-style-type: none"> ○ Smile, make eye contact, ask them how they're doing, etc.
<div data-bbox="337 856 792 926" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>OBJECTIVES</p> </div> <ul style="list-style-type: none"> • Define and evaluate unacceptable patron behavior • Explain common causes of problem patron behavior • Respond to patron aggression calmly • Implement active listening techniques • Adopt de-escalation techniques 	<p>Review Objectives</p> <ul style="list-style-type: none"> • Give trainees idea of what they'll be learning • Offer brief rationale for necessity of training
<div data-bbox="337 1262 792 1331" style="border: 1px solid black; padding: 5px; text-align: center;"> <p>DISCUSSION: WORST EXPERIENCES</p> </div> <div data-bbox="370 1352 732 1421" style="background-color: #333; color: white; padding: 5px; margin: 5px;"> <p>What kind of problem patrons have you handled?</p> </div> <div data-bbox="402 1434 764 1503" style="background-color: #333; color: white; padding: 5px; margin: 5px;"> <p>Was the behavior one-time or reoccurring?</p> </div> <div data-bbox="435 1516 797 1585" style="background-color: #333; color: white; padding: 5px; margin: 5px;"> <p>Were you frustrated? Frightened? Angry?</p> </div>	<p>Discussion: Problem Patron Experiences</p> <ul style="list-style-type: none"> • Ask participants to share current or past problem patron stories • Use guiding questions to get discussion going if needed <ul style="list-style-type: none"> ○ ex: Raise your hand if you've had a patron who monopolized your time with chitchat for hours. Would you be willing to elaborate?

<p style="text-align: center;">WHAT MAKES A PROBLEM PATRON?</p> <ul style="list-style-type: none"> • Problematic or just annoying? • Causes: <ul style="list-style-type: none"> ← Ignorance ← Frustration ← Trouble-making 	<p>Lecture: Definition of Problem Patron</p> <ul style="list-style-type: none"> • Problem patrons <i>interfere</i> with your or others' work. Annoying patrons are just annoying. • They may not realize they're causing a problem... or they may not care. • Ask participants for ideas about other identifiers and causes.
<p style="text-align: center;">TECHNIQUE: ACTIVE LISTENING</p> <ul style="list-style-type: none"> • Works as a preventative measure <ul style="list-style-type: none"> Keep focused <ul style="list-style-type: none"> • Put aside desk work Demonstrate understanding <ul style="list-style-type: none"> • Ask for clarification and follow-up questions Nonverbal communication <ul style="list-style-type: none"> • Eye contact, facial expressions, posture 	<p>Lecture: Active Listening</p> <ul style="list-style-type: none"> • Active listening: really hearing patrons' requests and giving them cues to show you're doing so. • With each point, demonstrate technique by giving examples. <ul style="list-style-type: none"> ○ Give examples of follow-up questions that may be useful. ○ Demonstrate proper posture, facial expressions, etc. • Demonstrate presence (Kulhan pg. 132)
<p style="text-align: center;">ACTIVITY: PRACTICE ACTIVE LISTENING</p>	<p>Activity: Practice Active Listening</p> <ul style="list-style-type: none"> • See Learning Activity
<p style="text-align: center;">DEBRIEF</p> <ul style="list-style-type: none"> • Did you feel more heard when your partner used active listening? • Was it difficult to demonstrate active listening? Did it feel natural? • Other thoughts? 	<p>Activity: Debrief</p> <ul style="list-style-type: none"> • Ask debriefing questions and give trainees chance to offer observations and thoughts about completed activity.

<p style="text-align: center;">TECHNIQUE: DE-ESCALATION</p> 	<p>Lecture: De-escalation</p> <ul style="list-style-type: none"> • De-escalation: Strategies to manage and mitigate conflict • Examples: <ul style="list-style-type: none"> ○ "You might not be aware that our policy requires you to use headphones." ○ "Yes, and I'd love to work with you to solve that." ○ "I'm sorry, I wish we were able to offer that service too!"
<p style="text-align: center;">ACTIVITY: ROLEPLAY DE-ESCALATION</p>	<p>Activity: Roleplay De-escalation</p> <ul style="list-style-type: none"> • Have two volunteers roleplay a scenario as an agitated patron and an employee using de-escalation skills. • Stop and start roleplay to point-out successful or missed opportunities for de-escalation. • Keep other trainees engaged by asking them what the employee should do next.
<p style="text-align: center;">DEBRIEF</p> <ul style="list-style-type: none"> • Were upset patrons able to stay upset? • How did language choices influence the conversation? • Other thoughts? 	<p>Activity: Debrief</p> <ul style="list-style-type: none"> • Ask debriefing questions and give trainees chance to offer observations and thoughts about techniques.
<p style="text-align: center;">POLICY REVIEW</p> <p>Disruptive behavior: any activity which endangers an individual, interferes with the library activity of other users or staff, or is illegal</p>	<p>Lecture: Policy Review</p> <ul style="list-style-type: none"> • Introduce Morris Library's user conduct policy on what constitutes disruptive (problem) behavior. • Disciplinary steps: <ul style="list-style-type: none"> ○ Ask patron to observe policy. ○ Ask patron to leave. ○ Contact campus security. ○ Have campus security ban patron.

WRAP UP DISCUSSION

- How could these techniques have helped with patrons we discussed earlier?
- How can these techniques be used on reoccurring problem patrons you interact with?

Wrap Up Discussion

- Refer back to opening discussion.
- Have trainees brainstorm ways to use training's information in their real life situations.

Learning Activity

Objectives:

Participants should be able to:

- Recognize the difference between active and non-active listening

Time:

30 Minutes

Instructions:

1. Have participants split into partners.
2. Give participants hand-outs and have each pair decide who will be the listener and the speaker.
3. Explain that the speaker will be asking the listener 6 total questions. They can ask the provided example questions, or create questions from their own experiences or improvisations. Questions should be fairly complex.
4. For the first 3 questions, the listener should avoid using any active listening techniques, and they're welcome to exaggerate their non-active listening performance. For the last 3 questions, they the listener should switch to using active listening techniques.
5. Explain that the listener does not need to actually answer the speaker's questions. They should only focus on what style of listening they're using and how they're demonstrating it. The speaker should also focus on how the listener's actions make them feel.
6. Have them begin exercise. Remind them to switch to active listening about half-way through.
7. Let them know when they only have a few minutes left to wrap up the activity.
8. Lead debrief by asking provided questions and giving trainees time to offer their own thoughts.

Debrief Questions:

- Did you feel more heard when your partner used active listening?
- Was it difficult to demonstrate active listening? Did it feel natural?

Handout

In this activity, you'll be practice active listening techniques you can use with patrons to make them feel heard, understood, and respected. Remember what separates active listening for non-active listening.

Non-Active Listening	Active Listening
<ul style="list-style-type: none"> • Continuing other work while taking patron's questions. • Assuming you know the nature and answer of patron's question before they've asked it. 	<ul style="list-style-type: none"> • Ask clarifying questions and follow-ups. • Maintain eye-contact. • Avoid working on other projects or doing non-related writing or typing.

Directions:

Speaker: Ask the listener a total of six questions you might be asked by a patron. You can use the example questions below or invent your own. Notice how the listener reacts to your questions, and tell them what you saw after each question.

Listener: For the duration of the first 3 questions, display non-active listening. For the remaining 3, use active listening. Don't worry about answering the questions; just focus on what actions make your listening active or not!

Example Questions:

1. I'm working on a project, and I need to find several sources about an artist from the 20th century. I think I'm going to do Matisse. How do I find books about him?
2. I sent an item to the printer and it didn't send. The printer must be broken, because I know I have money on my card.
3. How many books can I check out at once? How much will I be fined for keeping them too long? Is it hard to renew them?
4. Can you help me find sources for a paper I'm writing for my Psych class? I need 6 sources. I want articles, but nothing too complicated.
5. How late are you guys open? When are extended hours? Why aren't you 24 hours anymore?
6. What other computer labs are on campus? Do any of them offer different printing sizes? When are they open?

Debrief Questions:

- Did you feel more heard when your partner used active listening?
- Was it difficult to demonstrate active listening? Did it feel natural?

Assessment

Assessment of trainees should be carried out during activities, debriefings, and discussions. Training will be considered successful if trainees are marked as at least "Good" in each of the categories.

Category	Score				
Trainees were briefed on what defines and causes problem patron behavior.	Poor	Fair	Good	Very Good	Excellent
Trainees demonstrated understanding of the difference between active and non-active listening.	Poor	Fair	Good	Very Good	Excellent
Trainees demonstrated understanding of the purpose and proper use of de-escalation techniques.	Poor	Fair	Good	Very Good	Excellent
Trainees were reminded of Morris Library's user conduct policy related to problem patron behavior.	Poor	Fair	Good	Very Good	Excellent
Trainees were able to think of potential applications of the training material in their daily work.	Poor	Fair	Good	Very Good	Excellent

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