Lining up all your ducks:
managing a complicated project
with a large number of stakeholders

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Abstract:

Towards the end of 2022, the statewide tender for courier services, which covered the Public Libraries Victoria (PLV) deliveries, including inter-library loans, came to an end. New pricing for the courier options available to PLV rose between 200 and 300%. Victorian public libraries could not pay these increases, so an alternative had to be found. The solution included testing on a shared LMS, prolific communication and consultation with Victoria's public library services, training and marketing. This paper will give an overview of the elements in this project and discuss successes, failures and lessons learned.

Introduction

At the end of 2022, the Victorian Government's state purchasing contract (State Government of Victoria n.d.) for delivery services was coming to the end of its term, with no 'like for like service' on the horizon. Victorian public libraries waited anxiously while the government worked on a new tender panel, as we relied on this panel for the courier services that moved inter-library and intra-library loan items (ILLs) between Victoria's 51 public library services.

Unfortunately, when the tender panel was released, the courier services offered came in with new and significant increases in courier costs, which were neither affordable nor sustainable for the state's public libraries.

Public Libraries Victoria (Public Libraries Victoria 2024) had to find a way to make this work, or loans of items between library services would cease. Thus began a project to find an acceptable courier provider, and put in place the right adjustments, to ensure the service could continue at a price that was affordable for all the public library services in the state.

Background

Public Libraries Victoria (PLV) is the advocacy and facilitation peak body for the state's public libraries. It is a not-for-profit organisation, with funding coming from membership fees (Victorian public library services), grants and some sponsorships. PLV has a small team of five staff – 4.2 Equivalent Full Time.

The statewide courier project involved two parts:
- The movement of inter library loan items between library services. These items were generally requested through Libraries Australia Document Delivery (National Library 2013)
- The movement of intra-library loan items. Thirty-one of the 51 library services in the state share a library management system, and 25 of those services (the sharing libraries) also share members and items, under the brand of Libraries Victoria (Public Libraries Victoria 2022). This sees a significant number of library items move between library services, for hold fulfilment or as items being returned to owning library services.

The State Government provided financial support for the service, but the intra-library loan libraries paid additional courier costs to facilitate this broader sharing of library items.

Once PLV realised the extent of the change and the financial impact of the new tender panel, all inter-library and intra-library loan services were reduced, and ultimately suspended, to avoid cost blowouts, whilst work began on finding a financially viable alternative for our libraries.

Deciding the courses of action

Once the new State Government tender panel was released, it was apparent that none of the options was viable for public libraries in Victoria. As this happened after

the old contract had ceased, all movement of stock between public library services across the state was initially slowed and then suspended altogether.

Fortunately, PLV was approached by Australia Post, which was interested in working with us to find a viable solution, utilising its StarTrack courier service (Australia Post n.d.). However, in order to ensure the service was financially viable over the long term, the service could not continue in the old form.

Making it work

The first challenge was moving from a State Government panel to an arrangement between PLV and Australia Post. To ensure PLV could financially sustain the project, PLV Chief Executive Officer (CEO) Angela Savage successfully negotiated with the Victorian government to commit to three-year funding (the duration of the contract). The alternative for PLV was to hand back contract management to the government, which would not be beneficial for either party.

When the new State Government tender was released, PLV had already engaged a consultant to work with Victorian public libraries on Inter-Library Loans access. This project was put on hold and the consultant – Cameron Ahern, from Mach2 Consulting (Mach2 Consulting 2024) - agreed to shift his work to this more urgent project. The goal was to find ways to make the service work at a similar price to the previous cost.

As the biggest users of the service were the Libraries Victoria (LV) sharing libraries, Cameron worked closely with the LV System Administrator, Lloyd Brady, to gather data on the intra-library loan system to work out ways to continue the service but reduce the traffic.

Cameron and Lloyd also worked with representatives from LV sharing libraries specifically, and also with other Victorian public libraries, around the inter-library loan deliveries, to ensure that many different perspectives, ideas and concerns were considered. Cameron's final report came after collaboration with a wide range of staff, across many meetings (mainly using Zoom and Microsoft Teams) and emails.

The growth in the use of online meetings during COVID was invaluable, as staff from library services across the state were able to participate in the digitally-based engagement tools, whereas in-person meetings were not viable in light of the urgency of this project.

Getting buy-in

It was fortunate that there was universal support for finding a solution to the courier problem. Most libraries could not afford to pay the new costs for couriers, and this might have threatened the future of the service. Instead, library staff statewide entered willingly into the project, working with PLV and our consultant to find a solution that would meet all the requirements.

Universal support for finding a solution did not immediately transfer to whole-hearted, immediate support for the proposed solutions, which were multi-faceted:

1. The courier service would be reduced from five days a week to one day a week
2. There would be limits placed on formats, including no ILLs or holds (between sharing libraries)
   - On Picture Books, Board Books, Music CDs and Magazines, and
   - A six-month embargo on newly added print and DVD items.
3. The LV sharing libraries would be split into share groups, which would mean that library members (or staff on their behalf), would only have immediate holds access to a subset of libraries.
4. A limit of thirty holds for members in sharing libraries. Unfortunately, this limit was required for all holds, as there was no system-related way to differentiate group holds (from within a library service) with system holds (items from sharing libraries that were not held locally).

The share groups consisted of six sharing library services each, whose items would be able to be freely placed on hold by library members, or staff on their behalf. The composition of the share groups was based on fair access for all participating libraries and each one comprised:

- One large metropolitan library service
- One large regional library service
- The remaining library services grouped with these in order to ensure that the share groups:
  - Served a similar population size in total
  - Had a similar age of collections in total

This differentiation was completed in the shared library catalogue by only displaying the collections of the share groups in each group member's catalogue. This ensured that members could only place holds on their share group items.

One of the advantages of the Libraries Victoria sharing service was being able to access items from across the twenty-five participating library services. This was retained by giving members and staff access to the records via Z39.50 protocols, but making their interest in obtaining it a request – through a link to the library service's request form, rather than a hold.

Selected staff at each library service accepted these requests, as they would other requests for purchase or ILL, and determined whether to purchase or request. If the decision was made to request, they would then place a copy-hold on a non-share-group item and the holds process would take over from there.

Unsurprisingly, library staff were unenthusiastic about most of these proposed changes. We want to provide the best service for our members, and these changes would also add additional workflows to all ILL and intra-library loans related staff. Through online meetings, working group workshops and emails, these changes were discussed and dissected at length.

In particular, the restrictions on new titles, picture books and magazines were consistently challenged. However, in turn, library services were challenged to take this opportunity to use these processes as a tool for collection development.

In the end, it was agreed to accept the changes as presented and to trial them for three months.

Rolling out the changes

In the lead up to the relaunch of the service, PLV was in regular communication with our libraries, from the ILL/intra-loan library contacts, through to the library service managers. Marketing collateral was produced for library staff, including FAQs for both ILLs and intra-library loans, which could be customised to the library service and then distributed accordingly.

A statewide marketing campaign was prepared and launched in the lead up to the restart of the courier service. "Great News! Inter-library Loans Are Back" (Public Libraries Victoria 2022) utilised an animated video, still images and other collateral material, to tout the return of the service and explain the changes. *(You can view the video at: https://youtu.be/oycqSKoahQI)*

Although the service was ready to restart from April 2023, it was deferred to May (after consultation with libraries), so as not to coincide with school holidays and all the pressure that comes with those.

The service relaunched on Monday 1st May, with three courier routes beginning that day. StarTrack has 14 routes that cover all the state's libraries, running Monday to Thursday each week. Public holidays are covered by the moving of the affected day's route to the Friday.

The success of the marketing campaign was partially reflected in the small number of complaints that came in from "super-users" as their access to collections in sharing libraries was limited. Although the complaints were notable and sometimes intriguing, they were also minimal. The resounding response was "glad to have it back" from both library staff and library members.

Outcomes and what has happened since

As at April 2024, the service has been in place for nearly a year. The initial trial was for three months, but not enough data was able to be gathered during that short time, so although the service is ongoing, the assessment of restrictions was extended until the end of the 2023-24 financial year, in order to gather that required data.

The service has coped well with public holidays, library changes (including courier pickup location changes, library renovations, storms, fires and floods), with the Lead Shared Services acting as intermediary between the libraries and StarTrack.

Changes have been made to processes, labelling, delivery days and route order, so as better to meet the requirements of both library service and couriers. Library services have established good relationships with their regular courier. There are occasional issues, including deliveries dropped at the wrong location, libraries running out of satchels/crates/bags, etc., but these are usually quickly and straightforwardly resolved, whilst keeping everyone in the loop.

The service has been further tweaked by what we call downstream deliveries. Any satchel, bag or crate that is destined for a library service on the route back to the StarTrack depot at Port Melbourne is now being dropped off on the same day – saving a week in delivery for the receiving libraries and sorting/storage requirements at the StarTrack depot. This quicker turn-around has been appreciated by those library services receiving them.

Where to from here?

As at April 2024, we are heading towards the new financial year and PLV will be undertaking a review of the existing service to see if any changes can be made to improve it, in consultation with our libraries. Based on feedback from our libraries, we will consider removing restrictions on picture books and magazines and potentially reducing the embargo period on new items.

We will also review the Libraries Victoria share groups, with the intention of potentially reducing the number of groups, which will give libraries and their members wider "holds" access to more items.

Some of our Libraries Victoria non-sharing libraries have seen these changes as making the service more attractive, and are considering joining the sharing service, so PLV will work with them to make that happen if they decide to go ahead. This, too, will give access to more collection items for members of LV sharing libraries.

Lessons learned

This process began in October 2022 and was extremely well managed by my predecessor, Jacinta Cloney. She gathered the right people, played advocate / referee / counsellor as required and shepherded the service back into life in May 2023, deferring her retirement by six months to do so.

On reflection, the lessons we have learned can be summarised as:

- ***Have the right people in place to get the job done***
  Having our consultant, the Libraries Victoria Support Team and the Lead Shared Services in place to ensure the project was thoroughly examined, options critically reviewed and communications open and often, played a significant part in the project's success.

- ***Work with your vendor***
  Australia Post was on the statewide tender panel with pricing that was unworkable. However, they worked with us to find a better solution and continue to work with us on making improvements to our courier service.

- ***Regular communication***
  In order for this to work, our libraries had to agree to participate. To ensure this, we were in regular communication with them, via emails and online meetings. These communications incorporated library service managers, department heads and inter-library loans/intra-library loans officers, to ensure that all relevant feedback was being considered.

We also needed to communicate clearly with library members and communities, so they understood the challenges we were facing and why the service needed to change in order to be sustainable.

Furthermore, communication needs to be ongoing. Just because the service is running, it does not mean the communication should stop. Changes, adjustments, hiccups, customer feedback, etc. all need to be communicated, so that all involved know what is happening.

- ***Get good data***
  Decision-making was based on good information that was drawn from many sources. It was invaluable for determining the best solution, for making the case for that solution and for responding to queries and concerns.

  Data is also being used on an ongoing basis, to ensure that all requirements are being met and to help determine whether some of the limitations can be eased, without resulting in a cost blowout.

- ***Listen***
  All viewpoints had to be considered, and hearing these enabled us to adjust the service, so that it works to its optimum level, despite the limitations.

- ***Changes in people***
  Be mindful that people change jobs and keep on top of that. When someone new arrives, ensure they are trained in the whole process and its intricacies.

- ***Get the messaging right***
  In terms of marketing, publicising the suspension and the changes to the service was a very delicate process to navigate. The campaign had to celebrate the return of the service, knowing that some would be unhappy with the changes. To assist with this, FAQs were provided for both the public and library staff, so they were able to answer most of the questions being asked.

Conclusion

This project has endured many highs and lows. Although the service is not what it once was, we have worked together as public libraries in Victoria to see the ILL and intra-library loan courier service returned in a form that is sustainable and affordable for our libraries and their communities.

However, it will also always be under review. Improvement in processes, pricing, services, etc., may allow us to revisit how we offer this service and potentially introduce improvements. Any such changes will always be made in consultation with our libraries, with the goal always being to continue to provide the best service possible for our members.

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