

# Operation Alexandria Gutenberg:

## How the Talking Book and Braille Library Transitioned to Customized Cartridges

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We have all been there: you have something new and exciting you want to try, you have received approval, and now you have a plan. And it is such a nice plan. A logical, achievable, well-informed and well-crafted plan, like the kind you would see framed in a plan museum somewhere.

It's just too bad that plan will never see the light of day.

For a variety of reasons, no plan survives contact. It could be some small oversight that unravels the plan, or it could be, as in our case, a pandemic. But good planning is all about being flexible enough to reinvent your plan to work around obstacles instead of crashing straight into them.

Since the beginning of the Talking Book and Braille program in 1932, books circulated to print-impaired users as single titles. Users had to return all the items that made up a single book in order to receive the items for another single book. Though the audio format changed several times over the years from records to discs to cassette tapes to flash-memory cartridges (reducing the number of items needed per book), the 1-for-1 circulation method remained essentially the same. But that was about to change.

A new circulation method had been in development by our ILS vendor for years, one that would allow us to load cartridges with customized lists of books based on a user's requests and preferences. Each cartridge could hold up to eight audiobooks loaded from a digital storage unit that would be constantly updated in real-time. All users could have whatever titles they want whenever they want them. No more unavailable titles, no more waiting for copies, no more overdue items. This new method would reduce the number of cartridges mailed out per day from 1,200 to 150. The daily circulation process would be reduced from four hours to one hour. It would shrink our 90,000+ audiobook collection's physical footprint from thousands of shelves to one computer. This revolutionary circulation method makes everyone's life better.





From this ...



... to this!

So how do you plan for such change? It is easy to circle a date on the calendar and write “launch new circulation method,” but that level of change does not happen without intentional preparation. There is a lot of routine and repetition involved in the process of managing and circulating a collection, and most of it needed to be undone. For example, we used to inspect every book before it was checked in to make sure the cartridge and container matched. That task would no longer be necessary because cartridges and containers would now have generic labels. Trying to get overdue items returned used to be a multi-step process involving letters, phone calls, and notes in our ILS. That process would become obsolete because no customized cartridge is ever overdue.

Eliminating much of the normal daily work most of us took for granted required flexibility. While the customized cartridges method would be easier and faster, once implemented it meant some staff would lose a significant percentage of their responsibilities (up to 60 percent for one staff person). However, staff were willing to be flexible because we strategically planned how to fill the extra time with tasks focused on making the user experience better. We had been wanting to find ways to improve user retention, increase circulation, clean up the catalog, and narrate local-interest books, but other tasks always got in the way. Here was our chance to free up time to do these things, and we were excited about the opportunity.

Therefore, as soon as we had a firm target date for receiving the circulation equipment and the necessary software update for our ILS to implement the new method, our Librarian Elke Bruton and Program Manager Susan Westin began the process of revising staff position descriptions and redistributing responsibilities. We had from January to March to cross-train each other and settle into a new routine. For some staff it meant small changes like expanding or contracting their current responsibilities. For others it meant handing over responsibilities they’d had for many years to someone else while simultaneously training for entirely new responsibilities.



In those three months, we also needed to prepare the workstation for the new circulation equipment, figure out a standardized way of talking to users about the circulation changes, and determine a switch-over schedule for current users. Since we were still providing service to all users, we could choose who we wanted to switch over first. The plan was to roll out customized cartridges to heavy and difficult-to-serve users ahead of light users, thereby reducing the strain on our circulation technician while she temporarily juggled two service methods.

What tied all this prep work together was engaged leadership. Elke and Susan were heavily involved in helping staff wrap their heads around the transition, clearly laying out expectations, and persistently showing how small details helped support the larger vision. This proactive plan was working, and all of us were excited and on board!



Then COVID-19 happened. Elke was promoted to Program Manager in mid-March, and two days into her tenure she had to make the tough call to temporarily discontinue mail delivery of books—just one week away from implementation of customized cartridges.

Discontinuing circulation at the Talking Book and Braille Library is more than just shutting doors. 65 percent of our circulation is done through the mail to users all over Oregon, and because the mail didn't stop most of the users didn't understand why their books had stopped. But without knowing how long the virus could live on our plastic mailing containers, and with most staff telecommuting, trying to circulate materials was not feasible.

As the weeks rolled on and we still could not circulate materials safely, it became clear our original transition plan was no longer valid. For starters, the switch over plan we had come up with would need to be changed completely; we weren't going to be switching users over to the new system bit by bit anymore. We had stopped circulation for everyone, and restarting from a full stop is more complicated than a gradual transition.

Also, restarting from a full stop required us by law to give preference to all veteran users first when we resumed operations. After that it didn't seem appropriate to favor heavy users over light users since everyone was desperate for books following a two-month hiatus. To make things easy we decided to go with straight alphabetical order.

We also had to come up with some way to keep book cartridges sanitary as they traveled through the mail. The cartridges are normally mailed in a plastic container, and even if we could sanitize the container before mailing, they are touched by multiple hands throughout the mail delivery process. Whatever we came up with had to be relatively cheap, it couldn't interrupt the flow of circulation too much, and it needed to be constantly in stock at Office Depot. We decided on mailing the containers inside 6" by 9" manila envelopes. You can buy thousands at very low cost, they ended up only adding a few seconds to the circulation process time of each cartridge, and users could just recycle the envelopes after receiving the container inside sanitary and safe.

The most difficult detail to estimate was how many of our 5,300+ users we could restart each day without overwhelming our circulation technician, our readers' advisors, and our phone system. We intentionally started slow at just forty users per day but quickly ramped



up to at least 120 per day. Part of the reason we started so low was we called each user to let them know what to expect. But after a couple of weeks it became clear the calls were not necessary, so we quickly shifted to letting the few users who had questions reach out to us.

Each day felt like a new day, with new directions, new numbers, and new variables to consider. Here again is where engaged leadership made a huge difference. Elke was frequently checking-in with staff to gauge whether the system had reached its max or if we could keep pushing ourselves. She listened to our conversations with users and coached staff through how to respond to frequently asked questions. She sent out division-wide emails with clear, direct information and instructions so we were all on the same page. The end result was we were able to resume circulation to all users within *eight weeks* instead of an originally estimated *six months*!

An important part of our plan was a communication strategy for how to talk about the changes we were implementing. Thankfully, that strategy was maybe the one thing COVID-19 didn't change.

One of the main challenges we had to overcome was the tendency of staff to over-explain things to users. Most of us working in library land are information junkies. We like to think everything can be made better with information. Problems can be solved with information. Anxiety can be assuaged with information. And the more information applied to a situation, the better the result.

Unfortunately, a high volume of information often overshadows the core message and people miss the point. They get hung up on unimportant details or they stop paying attention too soon. So we intentionally identified the three basic things we wanted all users to remember (easier return method, eight books per cartridge, two cartridges per user), and staff were directed to offer additional information only when a user asked a question.

All staff were prompted with scripts containing specific words and phrases designed to be quickly delivered and easily understood from a user's perspective. By communicating clearly and concisely we mitigated the flow of incoming questions so we could focus on catching up from the COVID-19 backlog and fully resume circulation to all users as soon as possible.

It has been inspiring to experience first-hand how a well-crafted plan can be met with significant challenges but still survive. One silver lining of our COVID-19 temporary discontinuation of mail delivery was that it gave our users just enough of a break from the old method that they were immediately receptive and appreciative of the new one.

Staff are enjoying the ability to say "Yes" a lot more frequently to users: yes, we have that title; yes, we can send it tomorrow; yes, it is that easy. If you know anyone with a print impairment who might benefit from our special library, we'd love to say yes to them too. You can find more information about the Oregon Talking Book and Braille Library, including who is eligible and how to register, on our website: <https://tinyurl.com/y58yml8f> 

