Notes from Dealing with Difficult Patron Situations

June 2016

1. Situation: The **patron has a problem and has received conflicting information** from various service points. Before reaching your desk the patron has been to two other service points, and a phone call. The patron then goes on a long and angry rant with their voice raised about how we are here to serve them because they pay their taxes and our salaries are paid by them etc. (Alternatively, they are alumni or donors, or other VIPs.)
	1. Remain calm / Take a deep breath to calm yourself down
	2. Empathize with the patron
	3. Let the patron vent… for a while
	4. Don’t undermine your colleagues, don’t criticize or complain about them
	5. Apologize to patron about the complexity of the organization, many policies and procedures that change often
	6. Make your own reply quiet to model how they should speak, instead of matching their loud tone of speech
	7. Move the conversation away from the most public area if it is getting heated, and if you can
	8. Ask a colleague for help if you need to, and if you have a co-worker available
	9. If you need to refer yet again… make sure it’s the right referral. CALL AHEAD! Use the phrase “my best advice is” if you have to refer and can’t verify in advance.
	10. Afterwards check in with the staff who saw the patron previously to find out what happened, make sure we all agree on policies and practices

Comments on this scenario from Doe only session

* Acknowledge that the situation, not the patron, is the problem; listen calmly
	+ Repeat the problem to show understanding; give feedback
* Troubleshoot: what is actually going on, what does the patron really want
* Explain the reasoning behind the policy.
* Talk less; listen more
* Try not to hand the patron off again
* If you must refer the patron again
	+ Make a phone call to where you plan to refer patron, make sure it’s the right place
	+ Give the patron some action that they can do to help, reduce powerlessness
* Don’t bend the policy because of pressure
	+ Try to give some alternative that the patron can use which is in line with policy
* If patron remains dissatisfied kick it up the ladder - refer to your supervisor or a higher authority,
	+ Or encourage them make a complaint/comment on the online form http://www.lib.berkeley.edu/help/contact
* Dealing with your own feelings:
	+ If patron is scaring you, call Library security [Doe/Moffitt only]
	+ Know the policies well: if you feel very confident of the policy you will have more confidence enforcing it
	+ Supervisors- make sure employees know you will back them up and they won’t be blamed for enforcing a policy
	+ Notice your own feelings and remove yourself from the situation if needed, find a colleague to take over if possible
1. Situation: The patron seems to like you, or at least needs someone to talk to. You may even have a sense that the patron has personal issues with social anxiety or is lonely. The **patron hangs around your desk for a long time, making you uncomfortable by asking many personal questions, or ‘hitting on’ you,** or asking you to be friends. You feel sorry for the patron but also want to politely put an end to this.
	1. Redirect the conversation to a job-related topic
	2. Blame the supervisor and work rules for being unable to talk about non-work related topics with the patron at the desk
		1. “I’m really very busy at work”
		2. “I’m not allowed to have personal conversations at work”
		3. “I have to be available to others and your presence here at the desk might make another patron stay away from the desk”
	3. SLE should tell supervisor if patron is making them uncomfortable because it might be a bigger problem with the specific patron. Reinforce this in your training.
		1. Even if SLE isn’t worried personally they should report to supervisor anyone they are suspicious of
	4. Your unit can create a code word or secret phrase to get help. “Can Rex come to the desk?” “Get me the blue folder” to let coworkers know you need police or back-up
	5. SLE can refer lonely patron to other activities on campus

Comments on this scenario from Doe Only session

* Have a unit-wide ‘escape plan’- a secret way to get the employee out of the situation
	+ Chat/IM with a colleague and have them come help you
	+ Among staff members create a secret phrase [e.g. “get me the blue folder”] that means come help me
* If by yourself, let patron know the behavior is not ok
	+ “I have a lot work to do”
	+ “I can’t be seen talking only to one patron, I have to be available to help others”
	+ “Your comments are making me uncomfortable”
	+ Call security -- they will escort patron away, but be aware in advance of the possible repercussions for regular patrons you will see again
* Remember you are at work
	+ Refer to library policies about work behavior
	+ Remain distant and professional; you don’t have to answer personal questions
	+ Show empathy but be careful
* If the person is a regular patron is there a difference?
* Any solution to this problem may be awkward, recognize this
* Be clear: communicate that the behavior is unwelcome and they have to stop it. If you are explicit about being uncomfortable then any interactions after that may be considered harassment.
* If calling Security, be discreet. Security may escort the patron out. What happens the next time you see the patron?
* What about a stalking situation? Have to document the behavior over time with reports, in order to invoke legal sanctions
1. The **patron is ineligible for a particular service and refuses to accept your statement of library policy, because it does not give him/ her what she wants.** Patron wants an exception to the library policy and persists in trying to get around the policy, arguing with you about why the policy is wrong, illegal, or doesn’t apply to him/her. For example, an unaffiliated patron wants to study in the Main Stacks. Told that day passes are not given to casual visitors and that he needs to have a real research need, as evidenced by a call number, in order to get a day pass for the Main Stacks, the patron suddenly decides he has a research need and wants your help looking up a call number.
	1. Sympathize with patron
	2. Make sure you understand the policy thoroughly so you can explain. How much to try to explain the policy?
	3. Restate their complaint to let them know you understand their plight e.g., “am I understanding you correctly?”
	4. Make sure you understand what patron really needs, so you can offer them services they are eligible for
	5. Direct them to resources that they \*can\* use
	6. Encourage patron to comment [complain] to the administration or the librarian for that area. Use Library comments email.
	7. Pass the buck up to an admin or manager if you don’t understand or can’t explain the policy [applies to SLEs primarily]
	8. Follow up with your own colleagues to make sure the policies are enforced equally
	9. Offer to follow up with your own supervisor to clarify the policy, and get back to the patron by email
	10. Explain the limits of your own authority
2. A regular patron at your library is having a loud and angry phone conversation in the library. You approach the patron and quietly tell them that phone calls are not allowed in the library, the **patron then proceeds to get very angry and refuses to leave the library and is being very disruptive to other patrons.** You know that this has previously been an issue for this patron and that staff **have talked to him about it in the past**
	1. Refer to the library policy
	2. Warn that you will call the police
	3. Call the police
3. A new international student is making her first visit to the Library and needs some basic information. The problem is, **you can’t understand what she is saying**. Her strong accent and less-than-perfect English are difficult for you to grasp, even after several attempts. [A variation on this is a disabled patron whose speech is difficult to understand.] You are embarrassed and she is getting angry.
	1. Have her write out the question
	2. Find out what language she speaks and check the [language expertise list](http://www.lib.berkeley.edu/Staff/Language%20Expertise.pdf) on the library website to find a translator
	3. Refer the patron to a staff member who speaks their language if such a person is available. Get a co-worker who may be better able to understand them
	4. Google translater could be used
	5. Refer to Disabled student resources

For more ideas on how to talk to patrons in difficult situations, take a look at the Public Service Under Pressure guide which is posted below.