

DEMONSTRATING RESILIENCE THROUGH SUCCESSFUL TRANSITION PLANNING

A Panel Discussion On Succession Planning And Lessons Learned From New Depository Coordinators

October 20, 2016

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Andy Bourgeois – Arizona State Library, Archives, & Public Records

Brent Abercrombie – Indiana State Library

Agenda

- The Future of Government Information
- Succession / Transition
- Recommendations
- Our Stories, Lessons Learned, & Recommendations
- Your Turn!

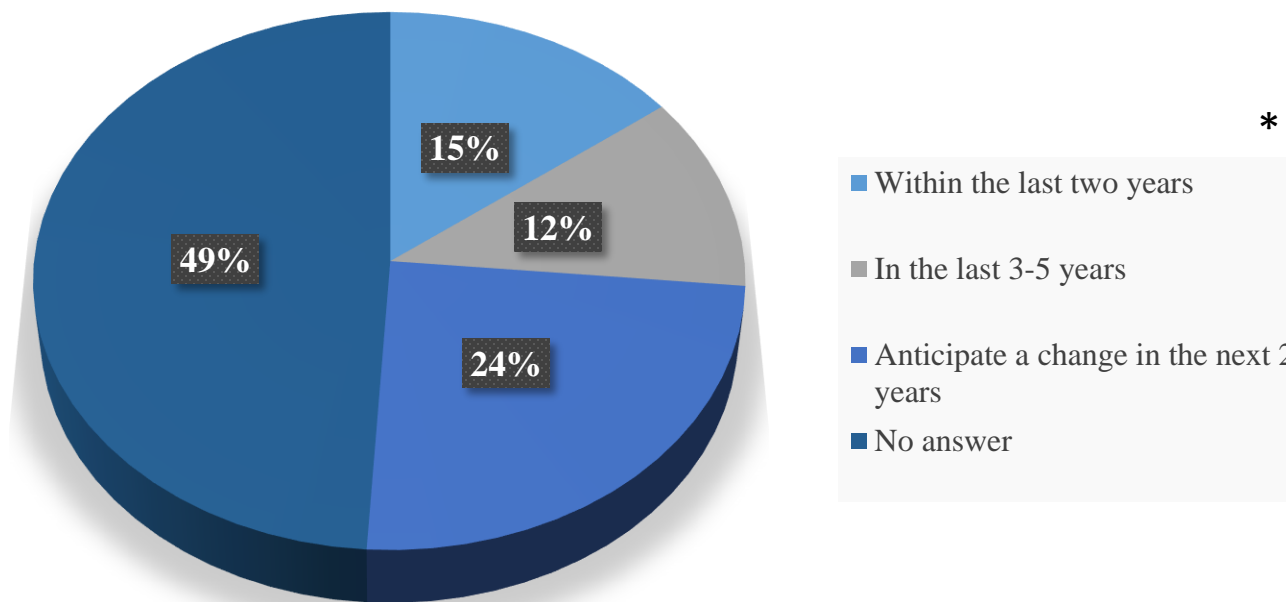
**Should We Be
Worried?**



In 2014, 42 Percent Of Librarians, 28 Percent Of Library Technicians, And 35 Percent Of Library Assistants Were Over The Age Of 55



“the depository coordinator has changed or is expected to change



* Unscientific and unofficial

Primary Means of Gaining Knowledge of Government Documents

N=210

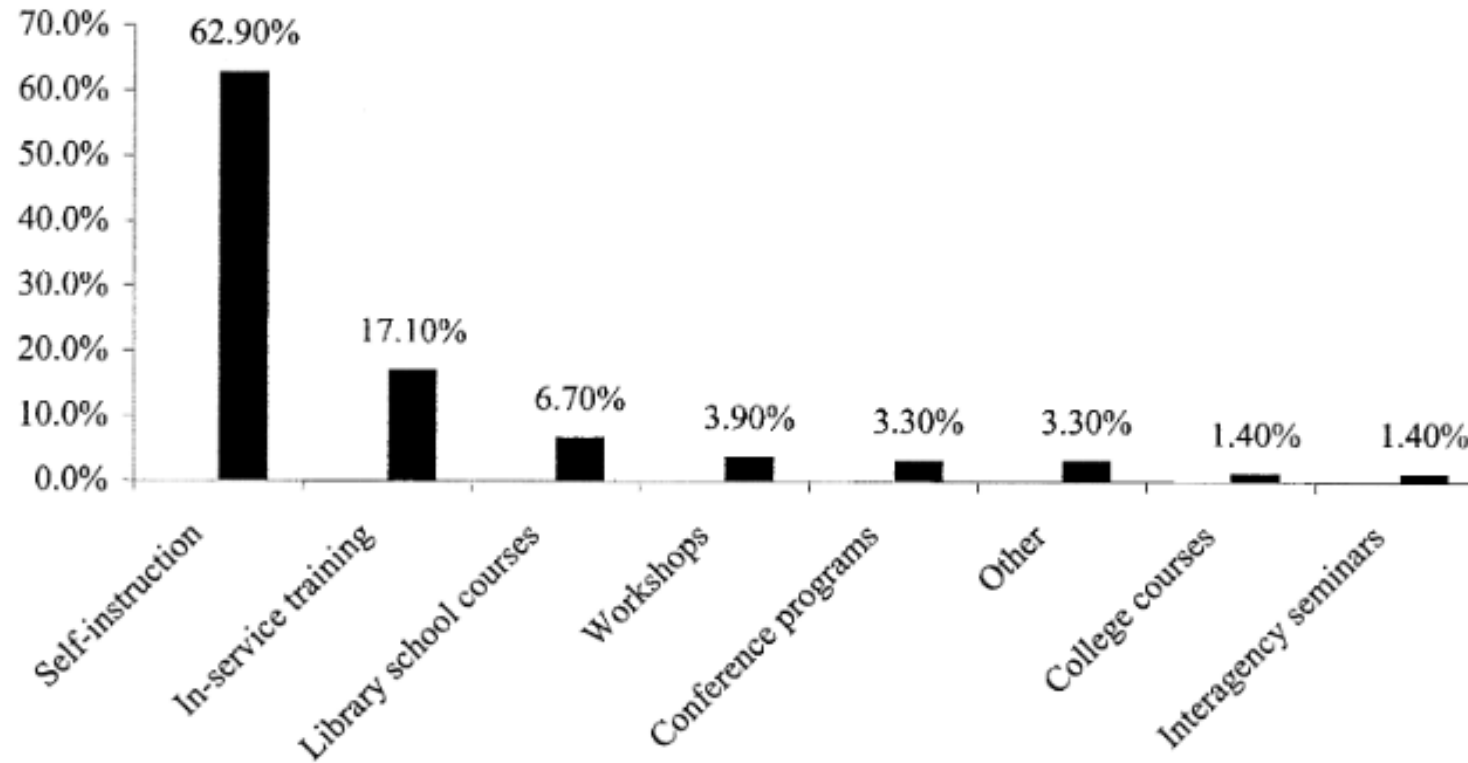
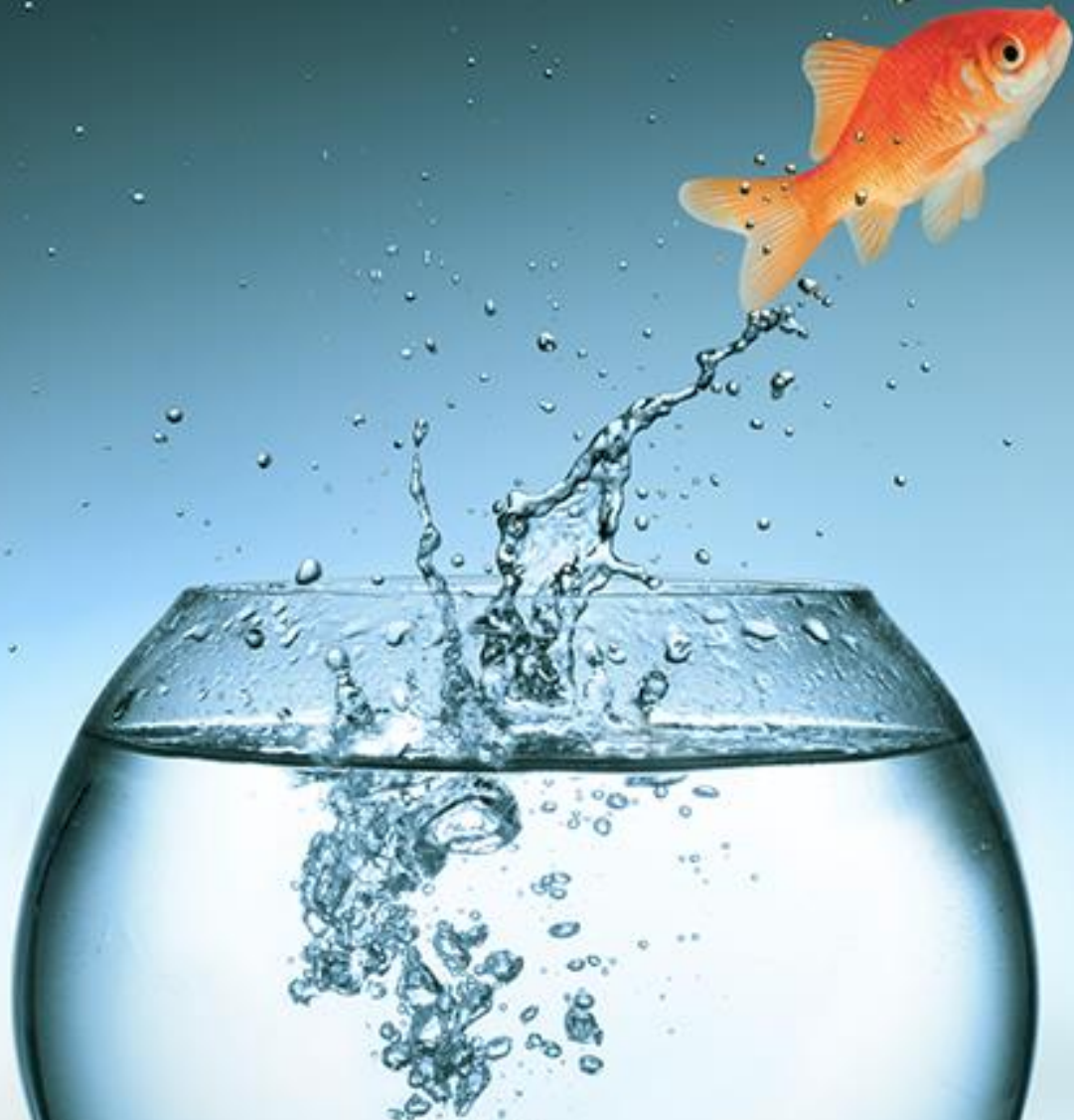


Fig. 1. x axis: means of gaining knowledge of government documents; y axis: percent of respondents for using the means.



SUCCESSION / TRANSITION



Succession

Continuance of corporate personality

Aims for continuity of leadership and is systematic and structured

Unidirectional change in the composition of an ecosystem as the available competing organisms respond to and modify the environment

Transition

a movement, development, or evolution from one form, stage, or style to another

an abrupt change in energy state or level (as of an atomic nucleus or a molecule) usually accompanied by loss or gain of a single quantum of energy

Goal

Motivate and develop the new coordinator to adapt to the new role as fast as possible, with the minimum damage

Literature Recommendations

1. Plan ahead & capture knowledge

- Share important documents
- Make a list of projects
- Establish an orientation plan
- Share, share, share!



Passing the Torch without Burning Down the House: Working Through Transitions within
the Depository Library Community
Janet Fisher, Erin Guss, Kate Irwin-Smiler, Marianne Mason, Karen Russ, and James Shaw.
Spring DLC Virtual Meeting April 27, 2016

Literature

Recommendations

2. Develop a succession plan mindset

- Try to get buy-in from administrators
- Make a profile of your workforce
- Identify key positions and duties
- Identify Competencies
- Assess Potential Internal Candidates (if possible)
- Create a Learning and Development Plan
- Implement and Evaluate



“Succession Planning for Information Professionals”, Francis Nganga & Sarah Kibugi

Literature

Recommendations

3. Preserve Institutional Memory/Tacit Knowledge

- Identify & recognize tacit knowledge
- Think creatively about storing & transmitting
- Identify & provide contacts for others with tacit/specialized knowledge



William J. Rothwell & Stan Poduch
“Introducing Technical (Not Managerial) Succession Planning”
Public Personnel Management 33.4 (Winter 2004): 405-419.

University of Colorado-Boulder

Kate Tallman– Regional Depository Coordinator



CU Boulder

- Regional Depository Library at a Research University
 - 2 Faculty
 - 3 FT Staff
 - 2 PT Staff
 - 8+ students
- Position Requirements
 - Research
 - Service
 - Librarianship
- Reference, Instruction, Collection Development, Outreach, Working Groups, Committees, Research...oh, and now running a depository

Ch...Ch...Ch... Changes

- NOT a large turnover rate
- Institution knowledge was (and still is) deep

BUT

- Department restructuring
 - Most technical services have moved
 - Lost 1 FT professional staff
 - Lost 1 Faculty
- BIG Projects Coming

Luxury of Time

- Impending retirement 2+ years
- Started planning in November 2015
- Quick and easy strategies → long term knowledge retention
 - Daily walk-and-talk
 - Various responsibilities were slowly transitioned (Emails, Collection Development, GoPIG, Conference Planning)
 - CC'd in every depository, administration, & collection-related email from Nov 2015 forward
 - Assigned projects and had performance evaluated
 - Really tough decisions came before the transition

Lessons Learned

- It doesn't really matter how much time you have, it's still not enough
- Take advantage of technology
 - Evernote for quick note taking -- "transition" folder
 - iPhone or smartphone recording for tours and important meetings
 - Cloud-based software for information gathering
 - MindMap software for unit/department organizational planning

Lessons Learned..

- Take time to evaluate the unit's structure and restructure if necessary. Make a few necessary changes while job descriptions, tasks, and duties are being reviewed
- Take note of every project and identify one or two big “splashes” that the new coordinator can make early on. This also helps with administrative buy-in!
- If there is time, use it well.
 - Make everything a learning opportunity
 - “How would you have handled that?”

Lessons Learned...

- People are invaluable. Tap into existing talent and don't hesitate to ask "dumb" questions
- Stay Calm! Transitions = Stress
- Remember that it takes 30 years of experience to gain 30 years of knowledge!

Surviving “Transition”

Andy Bourgeois

State Library of Arizona

Transition Pt. 1

Becoming the Regional

- Major Restructuring at State Library of Arizona
 - Janet Fisher takes over Talking Book Library
 - I succeed Janet as Regional for Arizona
 - 1.5 FTE (Associate & Clerk) for Fed Docs are fired

Transition Pt. 2

Pursuing a Shared Housing Agreement

- Restructuring includes push from leadership to look into a SHA
- Met with deans/university librarians at University of Arizona, Arizona State University, and Northern Arizona University
 - Get help from your administrator to get those meetings

Transition Pt. 3

Thrilling Conclusion!

- Everyone agreed it was a good idea

Recommendations Pt. 1

Managing Changes in Leadership

- Can you expect regular turnover in leadership?
 - State Library is part of Secretary of State in Arizona
 - Elected position that can (potentially) change every 4 years
- Be prepared to talk about costs of what you do AND costs if you stop doing it
 - Title 44 is your friend

Recommendations Pt. 2

Keep Leadership Informed

- Do you have partnerships with libraries or private organizations?
 - State Library and ProQuest Digitization Project
 - Does discarding print/regional status jeopardize those partnerships?
 - Are there restrictions on how money/staff can be used?
 - Staff paid for by partner, LSTA/IMLS funds, etc.

Recommendations Pt. 3

Make Lemonade

- Use the suboptimal as leverage
 - Losing shelf space to off-site storage?
 - Use access requirements as an opportunity to get some cataloging done
 - Reducing your physical collection?
 - See if there are any libraries or vendors who might offer to digitize them and provide access in return

Recommendations Pt. 4

Learning on the Fly

- Lean on anyone available
 - Predecessor
 - GPO Webinars
 - GOVDOC-L and REGIONAL-L
 - Help, I'm an Accidental Government Information Librarian
 - GODORT
- Document your processes

INDIANA STATE LIBRARY

Brent Abercrombie – Regional Depository Coordinator

OVERVIEW At ISL

- Federal Documents Collection is under the Reference Division
- ISL Regional Depository with 32 Selective Libraries
- Frequent Turnover (both w/ Regional and Selective Libraries)

PERSONAL BACKGROUND

- Worked at ISL for 8 years
- First 7 years as a Manuscript Librarian
- Limited Educational Background
- Started as the Regional Federal Documents Coordinator in Sept. 2015

IDENTIFYING ALLIES

- Identify Local Expert
 - Within the Library
 - Within the State
- Listserv Resource
 - State Level (FDLP-IN)
 - National Level (Regional-L)
- Professional Organization
 - State or Regional (INDIGO)

CHALLENGE – BEING OVERWHELMED

- Not Really Familiar with Federal Documents
- Unware of Issues that are Pressing to Selective Libraries
- Limited time to focus on the Collection
- Locating our Collection
 - Collection is housed in multiple locations
- Battling Self-Imposed Pressure

LESSONS LEARNED

- ASK QUESTIONS
- Attend as Many Webinars or Conferences as Possible
- Write About What You Learn
 - Created an Indiana Federal Documents blog
- Accept I Still Have Much to Learn

Concluding Themes

- No one depository or situation is the same
- Local knowledge comes first
 - Who can I rely on?
 - What, when, where, why, howthese questions should be asked first
- Share...Learn....Ask...Breath
 - Blogging, webinars, wiki's, google docs, audio recordings, emails, listservs, one-on-one meetings, conferences, committees, Regional documents groups

Your Turn

Please Ask Questions & Tell Us...

- **What's Your Story?**
- **What Would Your Advice Be to a New Coordinator?**
- **What Would Your Advice Be to an Outgoing Coordinator?**

A summary of this discussion along with a list of resources will be provided in an issue brief after the conference.