



Passing the **FDLP** Torch : Planning for Depository Succession

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What You Told Me

- “Our succession plan is a libguide to essential information for the federal and state documents librarian.” –John Elson
- “Neither. I've never thought about it until I saw this webinar announcement!” –Anonymous
- “No - and it was awful, which is why I want to create one!” - Kaylan Ellis
- “No, I had nothing. My successor gave me the password to log in to FDLP and that was literally the extent of the succession. ” - Anonymous



What You Told Me

- Question 1. Do you have a succession plan completed or uncompleted?

No	72
Yes	4
Partial	6
Incomplete	34

- Question 2. Did you have a succession plan when you began current position?

No	106
Yes	10
Partial	2
Unknown	8



Why You Should Have a Succession Plan

- Change does not always come with advance warning
- Helps to avoid interruption of processing and service
- Preserves institutional knowledge
- Parts of a succession plan can be used for training
- Document full scope of the duties and requirements of the FDLP



Who Should Have a Succession Plan

- Depository Coordinator
- Library and Technical Services Staff who have depository responsibilities



What to Include

- Log-ins and passwords
- Regional and GPO contact information
- Current and past projects
- Weeding history
- Policies, Desk Instructions, Shared Housing Agreements
- Partnerships
- Contact information for Government Documents staff/technical services, and reference staff in your library who have worked with government documents.



And More

- List websites, online guides and social media that you update
- List of local libraries and all FDLP libraries in the state (selectives), etc.
- List any depository programs, events, bibliographic instruction, and promotion responsibilities
- Provide day one steps for the new coordinator
- Record risks, issues of concern
- List professional development opportunities; such as ALA, state, regional, and local associations



Gathering the Info



- Create an electronic and paper file for storing information
- Locate and organize FDLP paperwork
- GPO can help if documentation is missing
- Locate and organize any policies, projects and instruction materials, (example: workflows)



Your Last Steps

- Store Succession Documentation where it can easily found
- Make sure at least one colleague will have access to the Succession Documentation
- Write a welcome letter for new coordinator to share information, words of encouragement and any tips which might help the transition
- If the possible, arrange/train someone to process materials and to provide depository support
- Get administration approval of Succession Plan, and sure superiors are aware of the succession plan and have access to it



New Coordinator Day One Tasks

- Review Succession Documentation left by predecessor
- Join government info listservs, such as [govdoc-l](#), and [doctech-l](#),
- Sign in to the [FDLP Directory](#) to update Depository Coordinator contact information
- Subscribe to the FDLP News and Events announcements
- Read the [Legal Regulations and Program Requirements](#)
- Review depository documentation
- Read Quick Start Guide <https://www.fdlp.gov/govdocs-quickstart-guide>
- Browse the depository collection





Provide additional FDLP Resources

- Catalog of Government Publications (CGP) <https://catalog.gpo.gov/>
- FDLP Academy <https://www.fdlp.gov/about-the-fdlp/fdlp-academy>
- FDLP LibGuides <https://libguides.fdlp.gov>
- **govinfo** Tutorials <https://www.fdlp.gov/govinfo-tutorials-2>



Suggested Webinars for New Coordinators

- Suggested FDLP Academy Webinars for New Coordinators
 - FDLP Depository Operation Series
<https://www.fdlp.gov/fdlp-depository-operation-training-series>
 - FDLP Exchange Training Series (for users of FDLP Exchange)
<https://www.fdlp.gov/fdlp-exchange>
 - FDLP 101
<https://www.fdlp.gov/fdlp-101>
 - Help! I am a New Depository Coordinator
<https://www.fdlp.gov/depository-operations>





Real Coordinator Experiences

- Two FDLP coordinator share their experiences

Liza Campbell of the University of West Florida, who recently became the coordinator. She did not have a succession plan or any information regarding the FDLP.

Marissa Krein, former coordinator at the University of South Carolina Aiken, who did have succession documentation when she assumed the position .She currently is the Instruction Coordinator and Assessment Librarian at Lora College.



Marissa: How succession planning helped

My predecessor left me a USB drive with electronic files which included:

- Past and planned projects
- Processing instructions
- Cataloging instructions
- Other documentation

She also left a private LibGuide which included:

- Log ins
- Contact information
- First steps



More from Marissa

- It was very helpful having files available to me.
- It gave me an idea where she had started and where she was planning to go.
- However, the most beneficial thing was her willingness to chat with me about the collection and the library in general.
- It inspired me to leave my contact information along with all my files on the same flash drive for my replacement.
- My predecessor's willingness to provide advice helped me adjust to my first position out of library school and succeed in finding and securing my second position.



Liza, “What would have been helpful”:

- Contact information for our regional depository, and who to contact at FDLP/GPO
- List of our selections (and guidelines on collection maintenance, rules on weeding, etc.)
- Internal workflows and maintenance guidelines
- Where our collection is located
- How our physical items are cataloged/processed
- How our e-resources are cataloged and made available in our OPAC
- How often our collection is evaluated, how to weed, etc.
- How to make sure we’re compliant with rules/guidelines set by FDLP



More from Liza

- I've found that those with longtime institutional knowledge forget what it's like to begin with little knowledge about internal procedures.
- A reference services librarian recently had to take an extended leave, she did not leave any procedural directions, and there wasn't anyone else to ask.
- However, with a small amount of succession planning, this process would have been much smoother, and would have allowed me to take on the extra duties without spending so much extra time searching for the information on where to start.



Government Documents Department Information and Procedures: Federal Government Documents Processing

Search this Guide Search

- Home
- Federal Government Documents Processing
- State Government Documents Processing
- Projects
- Shelving Information
- Catalog Changes

PROCESSING FEDERAL DOCUMENTS

Government Assistant/Student Assistant

When Federal Documents arrive, using a permanent marker label the date of arrival if the documents. After opening the box/envelope find the shipping list for each item in the box. Highlight each item received on the shipping list.

Federal Depository Shipping List

Shipping List Number: 2016-0937-P

Shipping List Date: 06/01/16

Shipping List Title: 2016-0937-P

Item Number	Quantity	Description
10000	1	...
10001	1	...
10002	1	...
10003	1	...
10004	1	...
10005	1	...
10006	1	...
10007	1	...
10008	1	...
10009	1	...
10010	1	...

Insert Blue U.S. Documents Processing Slip into or attach with paper clip to each document.

Documents should be processed within 2 weeks of arrival. The following items are needed for processing:

- Shipping List
- Date Stamp
- Barcodes
- Security tag

Succession Plan Example

Log Ins

SITE	USER Name	PASSWORD
FDLP		
GPO HELP		
Gov Doc Gmail		
Gov Doc Computer*		

Public computer keyboard and mouse and stored in librarian's office.



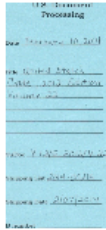
Succession Plan Example - continued

Insert Blue U.S. Documents Processing Slip into or attach with paper clip to each document.

Documents should be processed within 2 weeks of arrival. The following items are needed for processing:

- Shipping List
- Date Stamp
- Barcodes
- Security tag

The U.S. Document Processing slip needs to be completed as in the example. From the Shipping List write the title, SuDoc number, Shipping list number and Shipping Date. The B number will be entered by the librarian.



Date is the date processed

Title Page processing

- On the title page stamp the date item was received.
- If the librarian has provided the b number write it in pencil in the top left corner
- Write the call number in pencil in the top right corner (see instructions for spine label processing)

Final Processing

- Attach barcode to inside back cover centered near top edge
- Attach security tag onto a blank area of a page inside the document. If no area is available attach to the fly leaf or back inside cover.

Cataloging

- Once processing has been completed. All FDLP items must be added to the catalog.
- Search the catalog by SuDoc number, if the item has not yet been cataloged in Millennium ship the item via courier to Thomas Cooper Library. Prior to shipping, property stamp or place other identifying label to the item and make note on the processing slip that the item is being shipped to Columbia. If a record has already been added to the catalog add an item record according to instructions provided by the Thomas Cooper Cataloging Dept.

Home	Federal Government Documents Processing	State Government Documents Processing	Projects	Shelving Information	Catalog Changes
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Shelving Information

Shelving Items.

Stacks- The collection is divided into several categories :

- Federal Reference Documents (non-circulating)
- Federal Circulating Documents
- SC Documents (may be checked out with the approval of the Government Information Librarian)
- Special Collections a combination of Federal and State resources which are privately published and distributed.
- Department of Energy Reading Room Documents
- Nuclear Energy Publications and other publications related to the history of the Savannah River Site

Maps Case:

- Assorted USGS maps
- PREX maps
- SC maps
- Assorted Posters

Filing Cabinets*

Black Cabinets:

- Federal and SC Electronic Media (CDs and DVDs)
- Loose leaf Documents
- Federal Pamphlets

Beige Cabinets:

- DOE Electronic Media

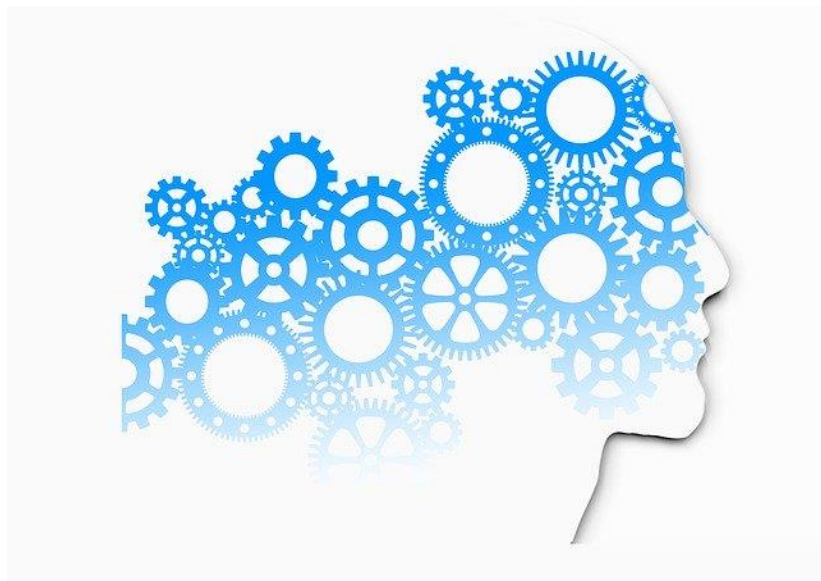
* These cabinets are kept locked except when in use. Keys are in the Government Information Librarian's Office



Additional Resources



- Depository Coordinator Checklist
- Succession Planning Poster
- 2016 Spring Virtual Conference Meeting – [Passing the Torch Without Burning Down the House](#)



Final Thoughts



Questions?



- FDLPOutreach@gpo.gov
- [askGPO](#)
- 202.512.1119