

Please stand by for real time captions. This is Kathy just. We will get started in for minute's.

Welcome to the Academy webinar passing the FDLP towards each planning for succession. Thank you for joining today. This is Kathy Carmichael. I am both the presenter today and a host. I am also one of the outreach librarians and out former depository librarian. I did create a brief succession plan before I left that position. Before I get started I'm going to walk through a few housekeeping reminders. If you have any questions you would like to ask about today's webinar or you have any technical issues free to use the chat box with the desktop computers or laptop computers is located in the bottom right-hand corner of your screen. I will keep track of the questions were going to try to and we will get to find them all in the list. The end of the presentation I will respond to each of them. We are recording today's session and will email a link to the recording and slides to everyone who registered for this webinar. In addition to the slides, a couple of handouts will be included on the recording page. We will also send a certificate of participation using the email you use to register for today's webinar. Anyone needs additional certificate because multiple people watched the webinar please email tran09@GPO.gov. Include the title of today's webinar along with the names and email address of those needing certificates. Desktop computer users may zoom in on the slides being presented. Click on the full screen in the bottom left side of your screen so it expands and exit full-screen mode mouse over the bar so it expands. Click on the blue return button to get back to default you. Finally, at the end of the session we will send out the weather satisfaction survey. We will let you know when the survey is available any URL will appear in the chat box. We appreciate your feedback including comments on the presentation style and the value of the webinar.

Welcome to passing the FDLP torch to us. Succession planning. This is a government ox 101 webinar. Any of you in the audience who are new point meters just type in yes in the chat box. I see a lot of familiar names. I know we have a lot of coordinators here. I'd like to see who's new. Why would succession planning being included in a series on topics for new coordinators. Your memories of your first day are pretty fresh and you remember what information was provided to you what information would've been helpful to you on this first days. This webinar is based on a presentation from the 2019 library conference. It's a great method to share it's limiting and one-sided. Were any use today's webinar to provide additional information and get coordinators and depository staff ask questions or make suggestions about succession planning. If you have any ideas feel free to share with them today. I am far from an expert. In outreach we receive questions from cordinator's who aren't sure how to get started and don't know where to get for information on F DLP repository cordinator. Much of the content comes from that experience. In addition to that experience I was introduced to the idea of succession planning from a presentation at the 2016 DLC meeting. I have included a link to that presentation which will be included on the recording. Let's get started. The first for the webinar will focus on that how to. The who, what, why succession plan. The second part will have succession plan and give you an opportunity to share your experience. We have a guest speaker today who's gonna talk about her own experience. In the registration I asked a couple questions about succession planning. One of my goals in the webinars to not only share information but to learn information about what you think should be included in what you have is a new cordinator. I picked out a few quotes from fellow depository for nadirs which grabbed my attention. For the record I asked permission an offer to withhold names. As you can see a couple people took me up on the offer of anonymity. First, it's a live guide. We will talk about the guides later in this presentation. I've nine there's thought about it always an ounce of it. It was awful which is why I want to create one. I nothing.

My successor gave me the password to log into F DLP and that was the extent of my succession. The first one is a common thing to happen to a lot of us when we take over.

The other thing is actual numbers. You tell me that 72 of the people registered as of yesterday afternoon didn't have a succession plan. For so yes and a partial or incomplete -- I should combine those numbers. In question two did you have a succession plan when you began hundred six said no. 10 of you said yes. To said partial and eight of you couldn't remember. Those were the numbers I expected to see from those's. That's not something we been thinking about. Hopefully after today a lot more of you will think about how to plan for your succession. Why should you have a succession plan? Serve waiting to a change in coordinator is imminent I hope you will start planning for succession today. Right after this webinar you're gonna get right on that. Will never know what tomorrow brings if we need to prepare for planned and unplanned succession whether temporary or permanent, who knows when you have a job opportunity, get promoted, or when the lottery. When providing a plan minimizes the interruption of repository operations. I'm sure some of us have stories about the first time we walked into the office after a long gap. The webinar presents suggested steps to get your present draft will start. They will be grateful. And who? Who should have a succession plan? While it would be wonderful for every librarian to have a succession plan no matter what their specialty when they arrived in new position, today's focus is for new depository recorded nadirs and anyone that works with government information. Not all parts of the succession plan will apply to all F DLP staff or those involved in FDLP operations. It may be helpful to new administrator who has little or no experience in FDLP or no knowledge of government information. What I mean by that if you have questions that might be helpful to understand the responsibility better than they might. What to include? Logins and passwords. Lots of passwords. We have FDLP .gov at FDLP exchange if you use the exchange program. Record distribution if you're a member of that program. Homeland security Digital Library subscribers and then we need policies. To policies in particular are important to everyone. It's public access and computer access. These policies should be not only written and stored but they should be publicly available. Cataloging and collecting statistics GPO contact information. They won't know how to get a hold of us for the regional. Current and past projects. If you have [Indiscernible] housing agreements any partnerships. If your preservation steward. That information needs to be shared. Contact information for government documents staff, technical services and anyone in your library who has worked or will work with government information. There's more. There are websites, online guide, and social media you update. Local libraries and FDLP members in the state. Any depository programs that you did provide special events, a bibliographic instruction, and any promotion or responsibility. Provide day one steps. And record risks or issues of concern. If your library in the past has talked about dropping from the program or transitioning to all digital or is they're talking about removing part are all storage these are important things that your excess or should know or any other issues of concern. Provide professional development opportunities. AOI, state, and local associations. When it's time to gather information to start working on this I would suggest create an electronic and paper file for storing information. Use as a place to store this information as it is created or identified. Locate and organized your FDLP paperwork. These are things like your designation documents, surveys, assessments etc. If you do not have any of these or we don't know where to find them contact GPL and we can provide some of these documents digitally. However, if your library was designated prior to 1930 chances are we will have the designation documentation. We are able to pin down an approximate date of

designation. We have a couple resources that can help us do that. Locate the legal requirements and regulations and that should be either the download from FDLP .gov or the length. The print version has been updated a few times. And then as mentioned before, partnerships, housing agreements, suggested policies, access and collection development. I will tell you, one of the handouts I've added to the recording page is a government succession plan check off list. It was created by the outreach department. That might also be helpful to you in getting started. We are going to jump from gathering info to your last steps. When you know you are going to be leaving and because most institutions delete most information from staff computers you must have methods to provide information to your successor. And possible solutions are to use a remote storage device for print documents like a USB drive, external hard drive and then use a cloud service for electronic documents. Like lid guides. OneDrive boxes, etc. Consider leaving your contact information for your successor as well as any other information you think might be helpful. I wrote a letter to my successor and told her a little bit about the job, gave her my contact information, just to leave some words of encouragement as she start position. I did not know at that time she [Indiscernible] later. And as possible arrange for someone to process material or [Indiscernible] someone to process material for repository report. It is not absolutely necessary for approval of a succession plan there may be some institutions that would require that but make sure your superiors are aware of the succession plan and will have access to. On day one I've come up with a list of possible day one tasks and first thing in these are in no particular order. The most important thing to do is to sign into the FDLP directory to update information. Once that's done we get an automatic email at outreach. Many of you may already know this. From that we will send the new coordinator some information about depository, the regional contact information and some links to help them get started and review succession documentation. Left by your predecessor join a list of the.L and this is really important. Subscribe to events that's how most of you probably found out about this webinar and we also share important announcements through this that coordinators need to know. Read the legal regulations. Review your depository documentation. Look at past assessments and inspections it's new coordinators. We have a quick start guide which is an overview of depository operations. Take a walk around your collection and begin to familiarize yourself with that. Here are some additional resources that might be helpful to a new coordinator that I would include in the succession plan. A link to the CGP publication. And of course the FDLP Academy because we have a lot of recordings there that can be helpful to new coordinator's. FDLP live guide. And have those taken a jump since this pandemic started. They're getting used quite a bit. And then got info tutorials. They are different aspects of info. Things like searching and navigating and a variety of different functions of government info. Some suggested webinars for new coordinators there's of depository operations series. If any of you are familiar with the coordinator's to ticket programs it's the same thing but without the interactivity. You don't get a certificate once you figure out all of the [Indiscernible]. We have the FDL P training series. One of the important things to remember about the FDLP exchange is that the accounts do not transfer from one career to the next. You have to request an exchange account. It only takes a day or two. That information on how to do that is included in the exchange training series. FDLP 101 is a good overview for information about FDLP and help on the new depository corners is another general information webinar for new depository coordinator's.

As I said I have some real coordinator expenses here. Give to coordinator's who responded to my request for information about their experience. Liza Campbell is can be with us live in just a

moment. She recently became a coordinator and did not have a succession plan or any information regarding the FDL P. And then Marissa who is a former coordinator in South Carolina did have a succession documentation and now she is at college of Iowa. Marissa, these are comments she sent to me. She said her predecessor left electronic files that included past and planned projects. Processing instructions, other documentation and she also left a private live guide which included logins, information and for steps. And Mercer said it was helpful having the files available to me. Gave me an idea where she start. However beneficial was her willingness to chat with me. Contact information for online files. For my replacement. Her willingness to provide advice [Indiscernible -- low volume]. Now are going to connect Liza and she's going to take over for a few minutes's.

Hello Kathy, can you hear me?'s

Yes I can. Hello everyone. I am Liza Campbell and I am the new head of technical services at the University of West Florida. I started this position in July of 2019 and I was gifted with what the coordinator duties when I was fumbling around trying to figure out everything in my primary job duties I was trying to figure out the FDL P succession duty as well. Just as a disclaimer my statements are not meant to disrespect my workplace or predecessors at all in all cases everyone has done their best with the information they had and as we know life happens. The person before me who had these duties had to go on extended leave which is why they came to me. Back in 1999 I was a government document library and at a public library. Things have changed a lot since then. It was like starting fresh. Basically, what I had to do is panic Google. That's how I found this information and Kathy. To get this information. Just having basic information about our collection would prevent anxiety and save time. As we have here what would have been helpful the contact information for our depository who to contact at FDL P just a list of our suggestions I had no idea what selections we have. Were at two percent selection suppository. Some internal workflows especially those how are physical items that is something that has not been consistent clearly. People were doing the best they could with the information they had. The mystery I solved was how our resources were being catalogued and being available. They were peering magically. Our consortium loads them from us. That was a treasure hunt in itself. Trying to find out how that happened. It's great. It's hands off. It's wonderful. And how often our collection is evaluated. And making sure were compliant with the rules and guidelines. Essentially I realized I've been our new coordinator for six months. Ms. will say I'm on those day one tasks. One of the things that comes to making the succession planning documentation what I'm trying to do is as I learn these things I'm making notes. Right now they're rough. Were document notes in a digital file the plan is of course as Kathy pointed out clean these up and make these readable and usable in a shared drive off my personal drive. If anything happens to me someone somewhere can have some information and take over. The reference services library who had to take her extended leave didn't have any directions and it wasn't anybody else to ask around the library that I could ask where are these things located and I did get information that way. With that amount of succession planning is login and through the contact would've gone much smoother and allowed me and take on extra duties without spending so much time searching for the information on where to start.'s first what I'm doing now and documenting as I go. Letting others know it's there. That's the other big thing that Kathy pointed out. I would suggest putting multiple people know including administration. Often nurse job turnover as well someone somewhere understands these things are located somewhere on a USB drive that would

be helpful flex person it's the first point on the fly. I have found that a lot of institutional knowledge people with longtime institutional knowledge forget what it's like to begin with no knowledge. Tried to be as detailed as possible in my documentation. Hopefully it will not only help me in the oncoming days as I learned more but also the next person who gets to take over for me.

Does anyone have any questions you can chat a man right now and we can get her response.

If there's no questions I will happily answer email questions if you want me to add my email to the chat or something.

Just in case.

It doesn't look like there's any questions. I'm going to let you go back to listening. Thank you so much. I appreciate your input today.

I am to presenter again. Marissa did provide even though she can be with us a screenshot of parts of their succession plan and I know it's not real clear the shipping list is a little fuzzy. This is what look like. Mrs. a live guide. The private live guide. There's the federal documents process he cost the documents processing, some project information, shelving information, and catalog changes. Here it tells what to do that arrived. They have a processing where they use. I'll say that a moment. It shows items needed for processing. Over here with big blue boxes covering the usernames and passwords for some things there FDL P login they have go ducks email and then also long and for the gov computer which workers use or people who wanted to access government information to use that computer. This note down here says computer keyboard and mouse were stored in the office because the computer was slightly hidden from public view and so no one could use it except for gov dock users. Here's more of the succession plan. This is a blue strip they use and it has information the date it was received the title, the shipping number, the OCLC number, the suit dock and then I think down here it was the date it was process. Minute talks about the title page processing the file processing link attaching the barcode and then cataloging information and overhears the shelving information in this was a relatively small collection. In the staff they had non-circulating federal documents and South Carolina documents and special collections of federal and state documents that were not published by the government were distributed by the depository. They were Department of energy so they had energy documents and media and near campus is Savannah River site which is a facility and they had some publications on the history of the site. And then there's filing cabinets. There's someone coming in don't know and have a good idea for things are located. There's a know where to find the keys. That's an example on a succession plan. For better or worse. Some additional resources. I told you about the repository on your checklist. And 8 1/2 by 11. Now of the poster from the conference. And a link to the spring virtual conference meeting. Believe it or not, when I made this webinar I do not remember that passing the torch was the name. It's just the perfect title. Some final thoughts. The hardest part of this is getting started. Succession planning is easily put off. At the very least, everyone should make sure there's someone on FDL P login's on contact information. There's no wrong way to create your succession plan, decide what your successor must have and make sure can be easily accessed. In this world we would have our successor in

place and trained before making a final exit. We know this is not a perfect world and having the succession plan in place is the next best thing.

Now any questions? I have the email address for FDLP outreach. I'm going to put in my email address into the chat box. If any of you have questions later and want to contact me feel to do so directly. SharePoint. Absolutely. If you have SharePoint or shared drive on the network somewhere that can be found it won't disappear. Marissa, this will be in a PowerPoint slide you get tomorrow. That is the only succession plan I have. If people want to send some to GPO I will try to find our way to send them publicly. Make sure you delete any or cover any PII Armando don't hesitate to contact us if you have any questions about anything. Were happy to help new coordinator's. Thanks for that info.

Erica know there's not. If you call the outreach number on the screen any of this can provide the information once we verify you are the coordinator. I just lost the question. Was about the checklist. That's going to be attached to the webinar recording page it will be on their. It's a word document. Can find any way to attach it. Deborah, this is all up to you. If they the succession plan and makes our job a little bit easier. It will help make the transition and not feel overwhelmed. Especially for coming to gov docs for the first time it can seem intimidating. If you do succession plans want to send them to me I'd love to take a look. If you have any suggestions for things please include those as well. Okay. Hopefully I'm not missing anything. You need to but it may not be a bad idea. That something haven't thought about passing it on to regional. You might want to check with your regional to see if they would be interested in having that information. Last call for questions or comments.

My timing was coincidental. I didn't realize we start talking about this six months ago we were all going to be hunkered down in our homes for months. It's worked out well.

If there are no questions I'm going to say goodbye and wish everyone a good day and Stacy. Thank you so much for coming. [Event Concluded]