

Exploring the Use of Succession Planning to Inform Recruitment and Onboarding





At the end of the webinar, participants will be able to ...

- define succession planning & onboarding
- connect concepts to recruitment and hiring
- identify external support entities
- evaluate onboarding activities
- identify opportunities in their own practice



Presenters



Carolyn

Interim Director of
Research & Education
Services

Health Professions &
Nursing Librarian



Alyssa

Science Librarian



Liz

Psychology Librarian

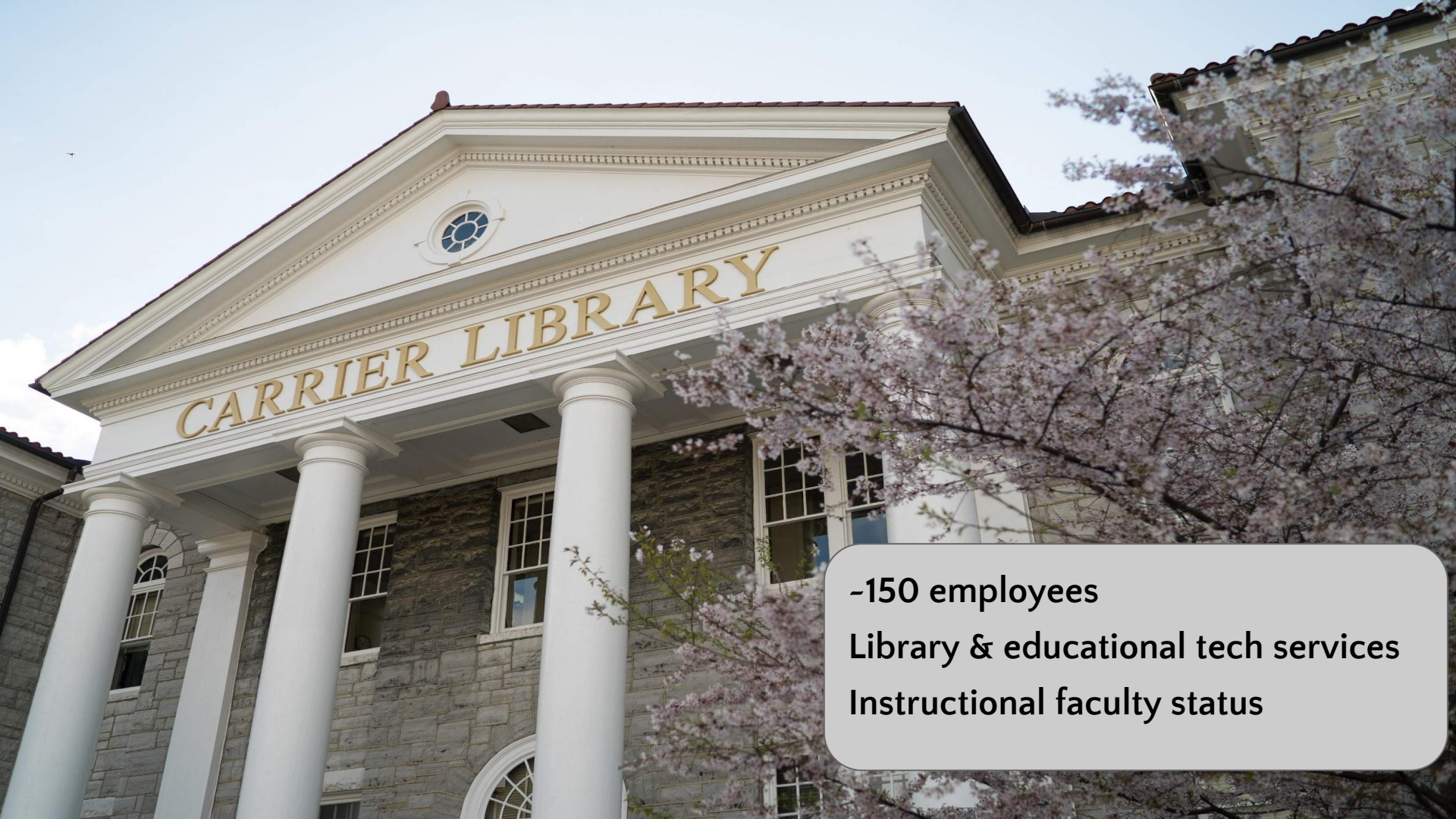
A photograph of the James Madison University sign, which is a curved wall with grey stone blocks and large black letters. In the foreground, there are yellow and purple tulips. A white rounded rectangle in the bottom right corner contains statistics.

JAMES MADISON UNIVERSITY

21,820 students

1,061 faculty

121 majors



CARRIER LIBRARY

-150 employees
Library & educational tech services
Instructional faculty status



If you won the lottery today,

Question 1

Who in your organization might be ready to fill your shoes?

Question 2

What knowledge, skills, and attitudes would help a new person be successful in your position?

Want to share with other attendees? Post responses to https://padlet.com/schubecf/llama_2020

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Succession Planning & Onboarding

What do we mean when we say this?

Succession planning is the process by which an organization makes sure that it will have the **right leaders** in the **right place** at the **right time**

(Sloan, 2007)



“



Succession Planning Process

- Identify and assess talent
- Create succession plans
- Create and implement individual development plans

Onboarding is the process of helping
new hires adjust to **social** and
performance aspects of their job
quickly and smoothly

(Bauer, 2010)



“



Associated Concepts

Institutional
Memory

Succession
Planning

Knowledge
Transfer



If you won the lottery today,

Question 3

What material(s) or resource(s) does your organization have that can help a new person understand your job?

Question 4

What would you have wanted to know when you started your current position?

Want to share with other attendees? Post responses to https://padlet.com/schubecf/llama_2020

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Our Example

What did we do?



Research & Education Services

11 liaison librarians

2 functional specialists

Liaison Framework

**Outreach, Instruction, Collections,
Scholarly Communication**



Scenarios

One: Short-Term Coverage

- Talent selection
- Create succession plan

Two: New Hire

- Talent selection
- Create succession plan
- Onboarding
 - Individual development plan
 - Mentorship



Short-Term Coverage

- Talent selection
 - Review other education and work experiences of team members
 - Review areas of subject overlaps
 - Discuss workload capacity



Short-Term Coverage

- Succession plan
 - Use Liaison Framework to structure knowledge transfer
 - Review existing data (ex: instruction stats)
 - Interview outgoing liaison



New Hire

- Talent selection
 - Develop interview questions based on knowledge transfer process
 - Share position activity priorities with candidates
 - Ask candidates about strengths and areas for growth



New Hire

- Onboarding – Individual plan development
 - Review various onboarding activities (Libraries, Human Resources, Center for Faculty Innovation)
 - Customize onboarding based on position and individual needs



New Hire

- Onboarding – Mentoring
 - Individual reflection journals shared with supervisor
 - Supervisor check-ins weekly
 - Establish 2-part mentorship
 - Short-term coverage person
 - Expert in area of growth outside of RES

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Alyssa's Story

How did it work?



Major Themes

Start from scratch

- Recent MLIS grad
- New to academia
- New to JMU Libraries

Large focus on Instruction

- Peer observation & support
- Teaching resources
- Instruction outlines
- Reflective practice



Major Themes

Key resources to guide first year

- Detailed outline
- Meet & greets with various folks
- Notes from previous science librarians

Mentorship

- JMU Libraries
 - Content knowledge
 - Libraries culture
- Campus
 - Faculty from area I cover
- External
 - Science Librarian

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Supervisor Reflections

How did it work?



What worked well

- Succession planning
 - clearer hiring and onboarding priorities
 - jumpstart knowledge transfer
 - short-term coverage = mentor
- Onboarding
 - robust support network
 - clear way to determine progress



Changing the Approach

- External hire → Internal hire
- Instruction → Collection
- Summer onboarding → Mid-year onboarding
- Life event

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Liz's Story

How did it work?



Major Themes

Classified Staff to Faculty

- Internal hire
- Time management & expectations
- Letting go of previous responsibilities
- Meet & greets

Key Resources to guide first year

- Detailed timeline
- Reflective journal
- Notes from previous librarian
- Professional development



Major Themes

Mentorship

- 2 mentors in the Libraries
- 1 campus mentor
- Support with teaching and scholarship particularly

Collections Support

- Collection snapshot
- Building relationships with both Resource Management & Psychology
- Notes from previous librarian

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Wrap Up

Where can we go from here?



Credits

Special thanks to all the people who made and released these awesome resources for free:

- Presentation template by SlidesCarnival
- Photographs by JMU Communications & Marketing and Andrew Strack, JMU Libraries



Thanks!

Any questions ?



Consulted Readings

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Consulted Readings

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Sloan, E. B. (2007). Succession Planning. In S. Rogelberg, *Encyclopedia of Industrial and Organizational Psychology*. Thousand Oaks CA: SAGE.. <https://doi.org/10.4135/9781412952651.n298>

Snyder, L., & Crane, E. (n.d.). Developing and implementing an onboarding program for an academic library: *Strategies and Methods*, 30(3), 6.



Appendix

Timeline example - Daily

Week 1

August 1

Time	Activity	Contact Person
8:30-9:30	JMU/LET orientation pt 1 <ul style="list-style-type: none">- Office area- Workday hours, leave, closings- Supervisor relationship	Carolyn Schubert, Interim Director of Research & Education Services
9:30-10:30	Tour of Rose Library	Kelly Miller-Martin, Planning & Operations Manager
10:30-12	JMU/LET orientation pt 2 <ul style="list-style-type: none">- Onboarding plan review- Communication norms (email, calendar, phone)- Key contacts- LET Guiding Statements	Carolyn Schubert
12-1:30	LET Mentor lunch <ul style="list-style-type: none">- Introduction	Kristen Shuyler, Director of Outreach & Partnerships
1:30-2:30	Independent work time	
2:30-4	JMU/LET orientation pt 3 <ul style="list-style-type: none">- Liaison framework overview- Library website 101 (catalog, QuickSearch, subject guides, etc)- Introduce Reflective teaching, effective learning	Carolyn Schubert
4-5	Independent work time	



Appendix

Timeline example - Weekly

August 21-25 Goals

- JMU [HR Compliance Training for Instructional Faculty](#) (OLC)
 - o Terrorism and Security Awareness (45 minutes)
- Research courses Emma taught in last year using [MyMadison](#) in order to identify the instructors; send an email to each instructor asking about meeting to discuss the course and setup instruction for the Fall semester

August 21

- JMU New Faculty Orientation

August 23

- Complete [Canvas Orientation](#) through Innovation Services

August 25

- All Faculty Opening Meeting 9-11Am in Festival
- College of Science & Math Opening Faculty Meeting Madison Hall, Room 1001 at 11:30 am.
- Transfer student orientation



Appendix

Timeline example - Monthly

September Goals

- INSTRUCTION:
 - o Observe 2 of your peer liaisons providing instruction; compare/contrast their styles and strategies
 - o Teach classes
 - o Have Carolyn, Yasmeen, and Kristen observe a class
- LET: Consider participating in the LET Ambassador Program to help with front desk service at Rose or Carrier
- OUTREACH: Visit the [Science & Math Learning Center](#) (part of the Learning Centers) and meet with either the Associate Director, Nolan McMurray, or one of the coordinators
- PROFESSIONAL DEVELOPMENT:
 - o Research and identify professional conferences or boot camps to attend. See list of [examples](#) from STS.
 - o Complete [Introduction to Camtasia](#) training through Innovation Services
 - o Participate in New Faculty Academy through the Center for Faculty Innovation
 - o Complete training for 2 subject-specific databases, like BIOSIS, Scopus, [SciFinder](#)
- REFERENCE:
 - o Answer questions
 - o Debrief on at least 1 encounter with Carolyn, Yasmeen, and Kristen



Appendix Journal Reflection Questions

Each week, use the following questions to help you reflect on the week and acknowledge where your time and energy has been spent. This also provides another asynchronous mechanism for you to address questions that arise during your reflections.

- What are you excited about?
- What roadblocks are you experiencing?
- What is taking up most of your time this week?
- What FAAP/career goals are you most focused on right now?
- Questions?