20+ Years of Knowledge Gone.
Now What?

Kathy McKinney

#IUG2020

Agenda

- Who Needs This
  - Covering a Position While Someone is Hired
  - Starting a New Position
  - Position with No Trainer
- Tips
  - How to Start
  - Get Organized
- What Info Do You Need
  - Contact Info
  - Important/Key Aspects of Responsibilities
  - Retention Periods

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"It is beyond a doubt that all our knowledge

begins with experience."

-Immanuel Kant

My Experience

- Public Libraries Since February 1999
- Worked in Every Department
- 5 Libraries
- 2 Cooperatives
- Volunteer
- MLA Leadership Academy 2010-11
- MeLCat Advisory Committee 2010 - 13
- PIAC: Polaris ILS Advisory Committee
- IUG Programming Committee

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How To Start: from Outside Organization

- Give Yourself Time
  - 1 year
  - Fiscal Year
- Get to Know Organization
  - Staff/Co-Workers/Colleagues/Boards
  - Policies/Rules/Procedures
  - Library Cooperative
- Files
  - Paper
  - Digital

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How To Start: from Outside Organization

- Computer System(s)
    - ILS
    - Ordering Vendors
    - Statewide Sharing System
    - Cataloging Records
    - Other 3rd Party Vendors
    - Intranet
- Ask Questions!!
- Take Notes
    - Use Your Notes
    - Read Your Notes
    - Simplify/Rewrite Your Notes

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How To Start: from Inside Organization

- Give Yourself Time
  - 1 year
  - Fiscal Year
- Files
  - Paper
  - Digital
- Get to Know Staff You Haven't Worked With
- Ask Questions!
- Take Notes
  - Use Your Notes
  - Read Your Notes
 - Simplify Your Notes

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Get Organized

- Find a Method That Works for You!
  - Paper
  - Digital
  - Hybrid
- Paper Files
  - Go Through Every Couple of Months
  - Most Used Files Keep Closest to You
- Digital Files
  - Importance of Labelling
  - Easy Access
- Binders
  - Label Spine & Dividers

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Get Organized

- Calendar – Digital & Paper
  - Appointments
  - Scheduling
- To Do Lists
- Bookmark Web Sites
  - ILS Vendor Sites/Reporting Tools
  - IUG
  - 3rd Party Vendors
  - Equipment Sites
- Passwords
  - Lock Up!
  - Password Manager
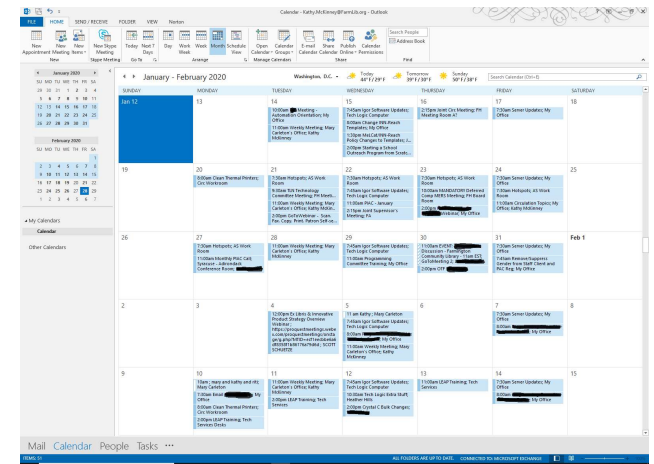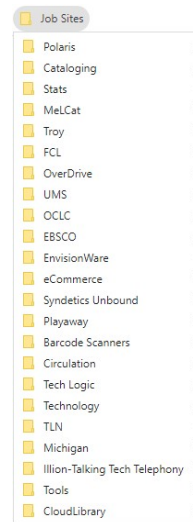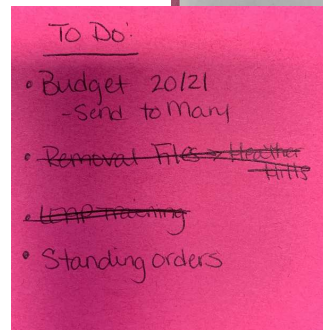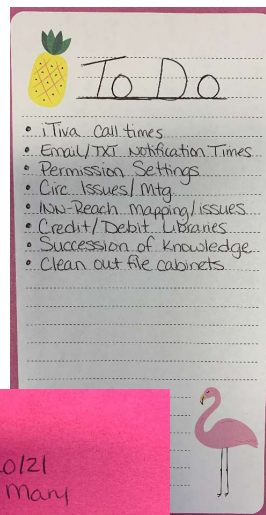
Contact Information

- List All Vendors/Companies
- Contact Person/Phone Number/Email Address
- Excel Spreadsheet
- Binder with Business Cards
- Rolodex
- Need Backup – Email Contacts Aren't Good Enough

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Key Aspects & Responsibilities

- 5-10 Key Functions
- Contact Information for Those
  - Example: Polaris ILS – Site Manager
  - Example: Baker & Taylor – Sales Rep or Tech Support
- List Responsibilities by When Tasks Occur

Retention Periods

- General Schedule #17 – Public Libraries (MICHIGAN) approved Jan. 2005

https://www.michigan.gov/documents/dtmb/RMS_GS17_640201_7.pdf

- Minnesota Cities General Records approved May 2018

https://www.mcfoa.org/vertical/sites/%7B067FFB58-E3CD-42BA-9FB1-11EFC7933168%7D/uploads/General_Records_Retention_Schedule_2018.pdf

Accomplishments & Logs

- Accomplishments
    - Write Them Down!!!
    - Use for Evaluations
    - "Brag" to the Board
- Everyday Tasks/Logs
    - Department Specific
    - Problem Logs

	A	B	C	D
1	Date	Machine	Problem	Solution
2	6/20/2019			
3	7/16/2019			
4	7/29/2019			
5	7/29/2019			
6	9/16/2019			
7	10/15/2019			
8				

How to Exit Role/Pass Along Responsibilities

- Remove outdated files
  - Paper
  - Digital
  - Retention Periods
- Train Backup(s)
  - Key Aspects/Responsibilities
  - Contact Information
  - Clearly Label Info
- What Was Helpful to You May Be Helpful to Others
- Continual Updating

"To know what you know and what you do not know, that is true knowledge."

-Confucius

Thank you!

Questions?

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