» “Perhaps no place in any community is so totally democratic as the town library. The only entrance requirement is interest.”

– LADY BIRD JOHNSON

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You Have One Hour

» Developing a Standardized Library Orientation and Evaluating Student Learning

BY ELIZABETH BROWN

INTRODUCTION

Limited classroom time with students is a challenge for instruction librarians aiming to develop and deliver quality instruction. When it comes to orientations, their nature lends them to be both limited in time and lacking a deeper research mission. In turn, this means they can be a challenging entry point for library instruction. However, getting students in the library, or at least aware of the resources available to them, is an important element of getting students oriented to campus. This is the landscape in which library orientations exist and function. The scenario is no different at Central Washington University where this orientation took place.

During the fall quarter of 2015, the librarians of James E. Brooks Library partnered with University 101 (UNIV101), a required orientation course designed for first-year students. This was not the first implementation of UNIV101 partnerships, but the relationship pivoted on the expectation of standardized content coverage. The main mission behind this orientation was to introduce students to library materials and services. One of the goals was to establish familiarity with the library from which to build on in higher-level library instruction. A secondary goal of this implementation was to check for student learning after their library session. The course outcome that was targeted during library orientations is represented in **Table 1**.

Given the flexible nature of this outcome, it was expanded to create clear expectations that the learner would be able to:

- Identify services, materials, and spaces available at the library

Table 1. UNIV101 Library Outcome

UNIV101 Library Outcome	How will the course satisfy this outcome?	How will this outcome be assessed (summative) and what is the measure of success?
Illustrate basic understanding of CWU library information resources.	Students will participate in class group work, presentations, homework, and/or CANVAS modules developed in collaboration with and/or by professional library staff and/or a guided tour of the Brooks Library with a professional librarian.	Students will demonstrate mastery of CWU's library resources through quizzes, completion of CANVAS modules, and/or a cumulative final exam at the end of the course.

- Identify OneSearch [the library catalog] as a starting place for academic research
- Apply evaluative strategies to assessing resources and differentiate between scholarly and popular resources

In defining this outcome, it was important to keep in mind that students in this session were not expected to have had previous library experience or exposure. Therefore, it was necessary to assume that students in this course might have had little experience with research or the research process. They also would not have a research project that they are working on for a course. The premise of the orientation curriculum and all case-based learning activities were designed with this in mind and were self-contained.

LITERATURE REVIEW

Academic libraries are not new to the student orientation process and while library orientations take a variety of formats, most aim for a common goal of providing an introduction to libraries in a friendly fashion. Some orientation activities have included scavenger hunts, tours, and games (Kasowitz-Scheer, 2006) to engage their audience. Other orientations that occur in the traditional classroom have integrated clicker response questions into library orientation sessions (Brush, 2010) as an engagement method. Engagement is central to effective orientations and student learning. As a teaching strategy, it can also take a variety of forms.

Cooperative learning, active learning, and problem-based learning all circle back to the goal of creating engaging learning experiences. Cooperative learning has its roots in active learning, but distinguishes itself by maximizing learning through group work (Keyser, 2000) instead of simply active individual work. As a teaching model, case-based or problem-based learning also draws on individual interests and input to offer an effective learning environment (Carder, Patricia, & David, 2001). With the knowledge that students are also more likely to value instruction that they feel has personal relevance to their learning (Latham, Gross, 2013), adopting problem-based and active learning models can be an effective way to engage students.

Orientations pose a challenge because students coming to the library for an orientation are unlikely to have an existing research mission or interest, and may not be as invested in the learning process. One way to counter this is to create realistic research scenarios for the student to connect to and engage with.

Orientations and activities can be delivered in-person or online, and the effectiveness of both have been examined in numerous studies. However, a clear determination on the most effective method remains elusive. In a meta-analysis examining consistency in effectiveness of computer-assisted instruction versus face-to-face learning, Zhang, Watson, and Banfield (2007) found the results to be inconclusive of one mode being superior. In one of their comparisons however, they found students were more satisfied with face-to-face instruction, but more confident after computer-assisted instruction—suggesting that a blend of in-person and online can be an effective approach to library instruction. In work by Kraemer, Lombardo, and Lepkowiski (2007), after implementing in-person, online only, and hybrid instruction, students were found to perform better on a library posttest regardless of medium. From this, one could conclude that library instruction in any form is better than no instruction at all.

However, designing instruction that is valued by students also requires they have identified library resources or knowledge as a need. Research by Gross and Latham indicate that some students are able to identify gaps in information literacy knowledge, but that students who struggle with information literacy concepts were more likely to overestimate their skills (2007; 2011). Access to the Internet may also play into assumed knowledge and in a series of studies, Fisher, Goddu, and Keil found that individuals consistently over-estimated their knowledge in instances where they had access to the Internet (2015). Being able to instantly access information on the Internet suggests a trend toward transactive memory and a false sense of personal knowledge. In order to counter this, information literacy instruction should create content relevant to students in order to engage their interest, and also help students reflect on their learning process to identify gaps in knowledge.

While students may hold a false sense of their ability to navigate the library, library welcomes and orientations still hold a tangible benefit to students. For one of the library welcome events examined by Kasowitz-Scheer, "94% of students who attended . . . [felt] more comfortable using the library for research assignments" (2006). Regardless of whether students believe they need a library orientation or not, they are likely to benefit from one, which can help introduce new resources, develop information strategies, and introduce friendly librarians.

Library orientations present an opportunity to level the playing field for incoming students by providing them a chance to engage with the resources available to them. They also present a challenge in learning design to create material that is standardized, fun and approachable, and academically earnest.

METHOD

Curriculum Development

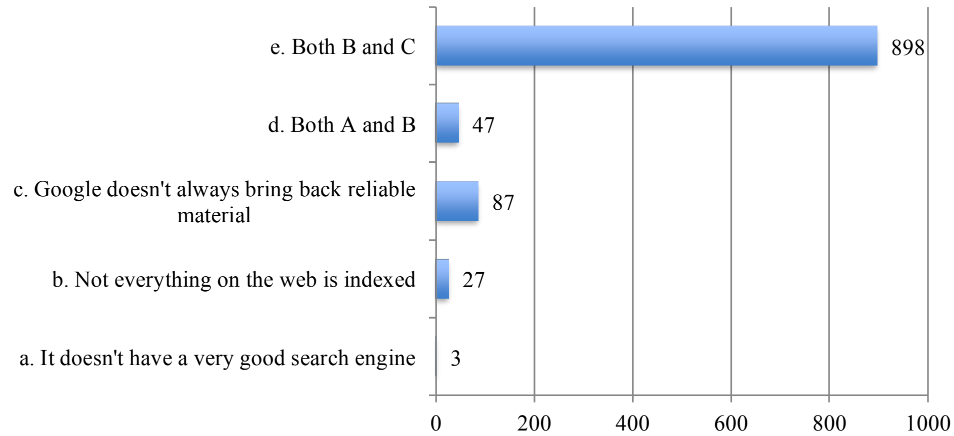
Development of curriculum for the library component began in the spring of 2015. Identifying essential content worth including in the hour-long lesson was a challenge and the initial version was far too ambitious in content coverage. Lesson objectives were based on struggle points observed during other library instruction in 100 and 200 level classes. Three librarians partnered with two advisors to pilot the new curriculum in two UNIV101 courses. After the trial, the involved advisors and librarians reconvened to review and revise. The ultimate lesson plan focused on helping students distinguish between popular and scholarly sources, use of the library search engine, and practice applying the CRAAP test to resources through an in-class worksheet. The worksheet provided students with a scenario in which they would need to identify keywords in order to find credible sources using the library search engine (see [Appendix A](#) for worksheet). These focus areas for the lesson plan were identified as fitting within the Authority Is Constructed and Contextual, and Searching as Strategic frames of the ACRL Framework (ACRL, 2016). Although Framework terminology was not yet confirmed by the ACRL task force during the conception of this curriculum, conversations about mapping to the Framework took place early in the process.

The initial implementation of the standardized library component for UNIV101 was during the fall of 2015. The actual library component was made up of two parts, an online component and an in-person session with a learning activity. Online content included a Canvas module with a pre-quiz, library introduction video, and post quiz. The Canvas learning management system was the standard online system in place at CWU and used by all UNIV101 courses. It was a natural fit to use for collecting pre and post quiz results. At its full scale, the in-person sessions were taught by 11 librarians sharing the instruction load, but all following the same standard lesson plan.

Getting Everyone on Board

Before delivering a standardized curriculum for the library sessions, there were a number of stakeholders that needed a basic understanding of the moving parts in order for everything to work. The main players included: librarians, section instructors, and the Director of Academic Advising who oversees University 101 and its involvement with other departments on campus. As part of an existing training for University 101 instructors, the Instruction Coordinator from the library conducted an orientation for as many of the session instructors as possible and served as the main contact for questions and coordination of the library component. This included reviewing the library component learning outcomes, instruction on how to add the appropriate librarian to their Canvas courses, scheduling library sessions, and an overview of day-of session activities. Orientation training for the 11 librarians was slightly more involved and covered additional details on navigating the online Canvas content, delivering the lesson plan, and facilitating the in-class activity.

Table 2. Question 1: Why can't we find everything we need for research by using Google?



Delivery

In preparation for the many standard library sessions to take place throughout the fall quarter, a copy of the lesson plan and a stack of worksheets for the in-class activity were placed at the instructor's station in the library classrooms. All librarians co-taught with another librarian during their first session to have extra help while they were getting familiar with the lesson plan.

RESULTS

The pilot sessions that took place in the spring prompted revisions to the lesson plan, LibGuide, and online pre and post quizzes. Working closely with a few individuals from Academic Advising and running a pilot allowed for review of the lesson plan and quizzes for appropriateness and difficulty, but most importantly, built trust in library material. Actively reaching out to University 101 instructors, communicating that the library wanted to partner on instruction, and presenting a clear lesson plan with learning objectives, activities, and assessment was critical to building trust.

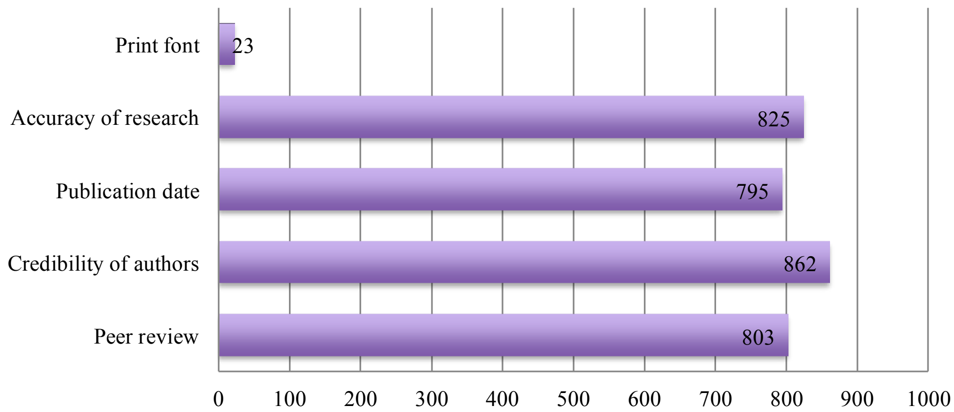
Communicating the library as friendly and approachable to students meant demonstrating a variety of platforms on which to find library materials. The lesson required students to engage with different technology tools, including engaging with video and online quizzes in Canvas, and responding to a poll about popular and scholarly sources in LibGuides during the in-class session. Being able to view poll results in real-time was popular among students and succeeded in generating class discussion on what constitutes popular or scholarly material.

Although UNIV101 courses were taught throughout the academic year, the majority were delivered in fall quarter; the results of postquizzes that occurred in the fall were collected and analyzed to make improvements for next year. The data presented in the results represents responses from 1,062 students. While 54 sections of UNIV101 were taught in the fall, data from the postquiz was examined from only 32 sections and some instructors didn't require their students take the postquiz.

Postquizzes included six questions, five of which were multiple choice or multiple answer. The last question was a short response to the question, "What was the most interesting or significant thing you gained from this session?". Results from the last question are not discussed in this study. Quizzes were untimed and administered via Canvas (the campus LMS) after a library session; deadlines were set by individual UNIV101 instructors. Results from the postquiz were downloaded from Canvas at the end of the fall quarter by each of the librarians embedded in their sections. Data was compiled and analyzed to draw conclusions about student comprehension of the material presented. The results of the postquiz are presented here with the questions students were asked, followed by a short summary of what could be concluded.

When it comes to Google, the majority of students understood that "e." was the most appropriate response. A take-home message from this question was that Google isn't necessarily an ineffective search engine, but that it isn't always the best option for finding scholarly material. The fact that 47 individuals still selected "d." indicates that there may still be some confusion on the role of a search engine. Based on student responses from other library

Table 3. Question 2: Identify some common elements of resources that you should examine before using them. (Check all that apply)



sessions and one-on-one consultations with students, this is not surprising and confirms that an understanding of what search engines do, should not be assumed.

During the in-person lessons, materials were evaluated in terms of currency, relevance, authority, accuracy, and purpose (also known as the CRAAP test). Students were asked to evaluate sources based on these factors during the activity portion of the lesson. The results indicate that most students were able to identify that 4 of the listed factors were important tools for evaluating a resource. However, there is some inconsistency with the greatest range being 67 students who didn't identify all the correct indicators.

During the in-person session, students were asked to identify popular and scholarly sources and discuss a rationale as to why they felt it belonged in the popular or scholarly category. On the postquiz, most students identified a "peer reviewed article" as a scholarly resource and a limited number of students chose "Ask.com", a good sign. However, Psychology Today received 335 responses. This choice is a little trickier because it may sound scholarly, but in reality trends toward popularized science. Given that the quiz didn't have a time limit or browser blocking enabled, students also had the option to look up this magazine. These results are not surprising and confirm that resource evaluation takes continued exposure to fully understand the concept in action.

During their research activity, students had to employ various search techniques to locate materials for their scenario research. While all of these options would be appropriate, students chose adding subject terms less than their other options. This is not particularly surprising and there are a few potential explanations for this. In general, subject headings require more explanation than keywords. They also require a little more digging to locate within the search interface. However, the logic that the more you add to your search, the fewer results you will get didn't seem to convince the 418 students who didn't choose it.

Fortunately, the majority of students chose "All the above" when asked what options are available to get help from a librarian. This is perhaps the most important question. As students progress through their studies, understanding that help is available and knowing where they can go for it is paramount to their academic success.

DISCUSSION

During the 2015/16 implementation of the UNIV101 library component, the librarians reached 1,662 students through UNIV101; this was significantly up from 354 students in the 2014/15 academic year. The increase in instruction is significantly related to building new relationships, offering a standardized instruction with clear learning objectives, and getting buy-in from those directing University 101. Throughout the entire process it was essential to listen closely to feedback and maintain flexibility. Even the best laid plans still required adjustment, being prepared with the mindset that flexibility would be necessary helped create realistic expectations on both the side of the UNIV101 instructors and the librarians.

However, implementing a large-scale library orientation is not without its challenges or lessons. One lesson gained for future years, was that it is easier to have a single coordinator for scheduling sessions, embedding Canvas content, and organizing trainings. While integrated instructional technology and engaging class activities contribute to student learning, for those unfamiliar with methods of teaching through technology it can be more to train for and remember. Having a single coordinator allows librarians and section instructors a single point of contact to clarify scheduling, Canvas, and quiz concerns.

Another factor for anyone considering integrating new technology tools into their library instruction introduces a potential learning curve. This library component included multiple interactive tools through a LibGuide poll, as well as Canvas content pages and quizzes. Invariably, when work-

Table 4. Question 3: Your professor has asked you to find scholarly resources for your research paper. Which of the following materials could fall into that category? (Check all that apply

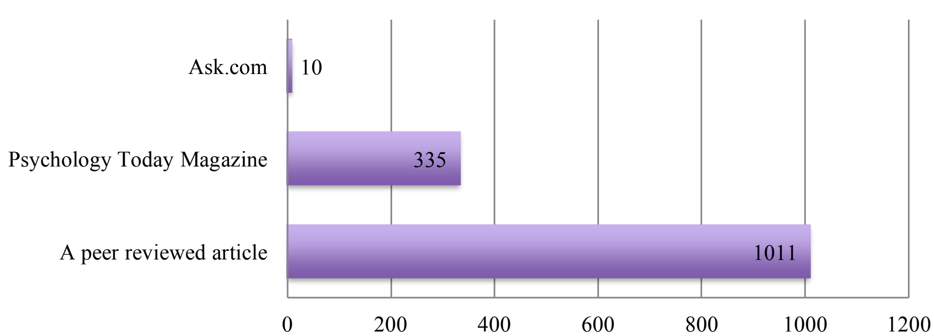
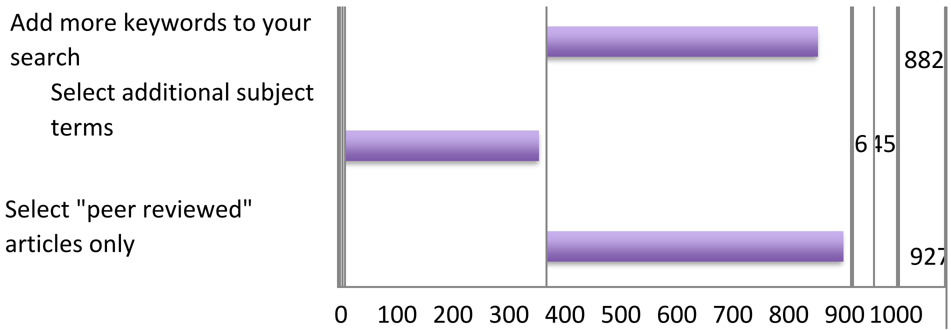


Table 5. Question 4: After conducting a search for "digital screens and sleep disorders," you retrieve 1,000 results. What are some ways you could narrow your search? (Check all that apply)

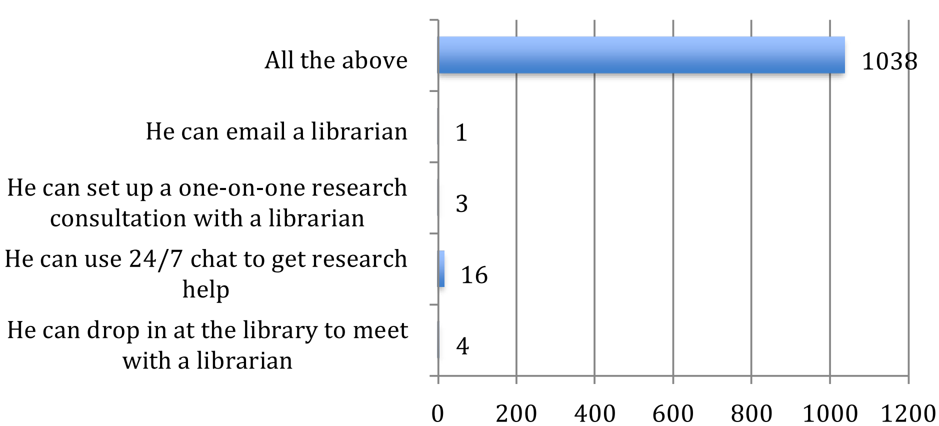


ing with a large group of instructors from diverse backgrounds there will be a variety of technology competencies. Although all librarians had some level of Canvas training and experience, many of the librarians were new to using the tools required for this implementation. When expecting competence in using new technology tools, provide opportunities for individuals to test using the technology, ask questions, and practice integrating them into their instruction.

A standard piece of advice regarding instruction is: never assume knowledge. This is especially true when teaching first year students who have had little to no exposure to academic research. The time needed to discuss the difference between popular and scholarly materials was significantly underestimated and more time should have been allotted toward that discussion. Similarly, the amount of time needed to complete the in-class searching exercise was also underestimated as students needed more time to navigate the search interface.

The postquiz results suggest that while there were still some areas that students were less sure about, they performed well on questions that asked about information evaluation, the role of Google, and library services. Variance within these responses suggest that these are also topics worth review in future library instruction sessions. The final postquiz question suggests that students successfully gained what was paramount to this session: that the library is there for them and there are many ways to find research assistance. ■

Table 6. Question 5: Shawn feels that he has been searching forever without any luck. What options does he have to get help from the library?



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Improving Onboarding with Employee Experience Journey Mapping

» A Fresh Take on a Traditional UX Technique

BY HANNAH MCKELVEY AND JACQUELINE L. FRANK

IMPROVING ONBOARDING WITH EMPLOYEE EXPERIENCE JOURNEY MAPPING

A number of libraries use methods to better understand user experience, and make decisions based on that insight to guide their futures. Journey mapping is one such method that can be used to document and communicate a user's experience of a product, service, or process from beginning to end, by comparing an expected journey to the actual journey experienced by the user. Kaplan (2016) defines it as "a visualization of the process that a person goes through in order to accomplish a goal. It's used for understanding and addressing customer needs and pain points." Journey maps usually have three parts; the first section is "a lens that provides focus and context for the journey being mapped, [the second is] an area depicting the user's experience, and a third zone [is] for insights derived from analyzing the journey" (Williamson, 2016). Journey mapping allows organizations to gather information that will help them better understand "the frustrations and experiences of [their] customers" (Boag, 2015). Once the user's feelings regarding their interaction with a product or service has been captured (Schmidt & Etches, 2014, p. 1), pain points and happy moments are organized into a visual journey map (Williamson, 2016). Visualizing a user's feelings allows frustrations to be identified and addressed by creating solutions that will accommodate the preferences of many users (Marquez, Downey & Clement, 2015). Happy moments or positive experiences can also be identified and amplified with the goal of improving the experience for future users. See an example of a journey map (**Figure 1**).

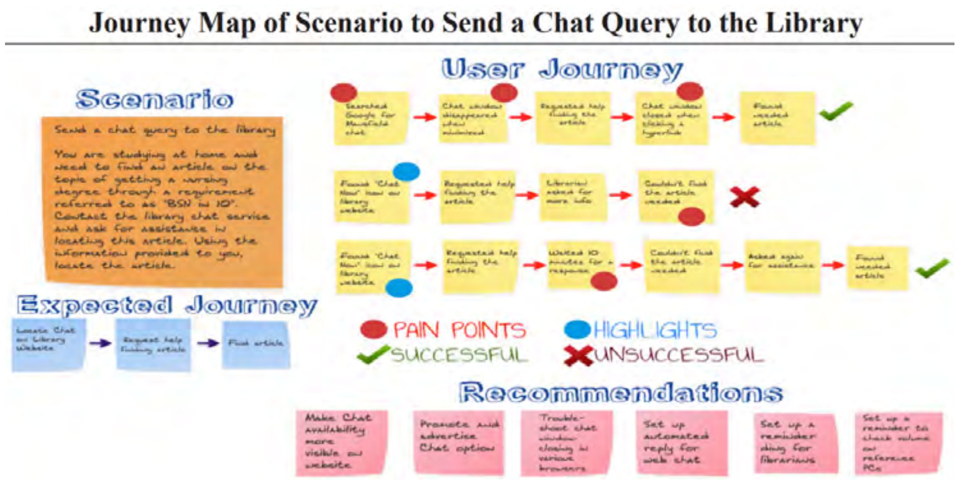


Figure 1. Example of a traditional journey map of a chat reference transaction (Samson, Granath, & Alger, 2017); this work is licensed under a Creative Commons Attribution 4.0 International License.

Journey mapping has been used in libraries to understand how students, faculty, and staff use library services with the intent of improving the overall experience of the user. One journey mapping pilot study conducted by a library with first through third year college students, resulted in an increase in usage of their chat platform (Samson, Granath, & Alger, 2017). Journey mapping also helps libraries to create consistent experiences for their users. In a study conducted by the Birmingham City University Library, journey mapping improved the experience of first year students by "provid[ing] a fresh perspective, increas[ing] librarians' understanding of the student experience when using library services… [and] gave ideas for larger changes for future services developments" (Fichter & Wisniewski, 2015). Other organizations have utilized journey mapping in similar ways. A study in Ireland focused on how journey mapping can be used to improve the patient experience within the healthcare system by using a human-centric design tool to better understand how patients navigate such a complex system (McCarthy et al., 2016). Additionally, large companies such as Amazon and Google, now have customer experience officers on staff, and compare the importance of understanding the customer experience to journey mapping (Lemon & Verhoef, 2016).

While the most common type of journey mapping focuses on external customers, there is also a less common application of the technique that DesigningCX (n.d.) refers to as employee experience journey mapping. DesigningCX (2015) defines this as "a people-centric discovery process" that considers the employee, rather than the customer, as the user in an organization. They describe journey mapping as a way to quickly determine challenges employees are facing, and offer solutions in innovative ways to eliminate, fix, or help solve those challenges, with the goal of improving performance and engagement of employees. One such application is teasing out individual organizational onboarding experiences and improving that experience for new employees. Journey mapping is a helpful design research tool to determine satisfaction of a user, changes in their needs, and other details in each phase of their experience (Howard, 2014). Therefore, journey mapping can be an effective method of assessing an onboarding program from the perspective of the new employee. It can help libraries gain valuable insight into the experience of new hires in the organization, with the goal of improving the onboarding process to boost productivity and retention.

Improving the onboarding experience of new employees is important for the wellbeing of any organization. Research shows that onboarding programs that are viewed positively by employees lead to increased retention, increased employee satisfaction and engagement, and a reduction in the time it takes new employees to become productive in the organization (Hall-Ellis, 2014; Snell, 2006). Snell (2006) suggests that organizations lacking a comprehensive onboarding process risk losing productivity and the interest of their employees. An engaged workforce leads to better services for patrons, and can also lead to a more positive work environment for both staff and library patrons alike. It can also help generate positive perceptions of the library within the community.

We improved onboarding at our own institution by deploying employee experience journey mapping and focusing the lens inward on the Learning and Research Services department at Montana State University Library and its internal onboarding practices. Using employee experience journey mapping, we gained a clear understanding of existing assumptions and the current onboarding culture at MSU Library, which we found to be sporadic and inconsistent. We identified key challenges and areas of improvement, including lack of documentation, outdated procedures, and inconsistency in the way new employees were oriented to their job. Once we identified the challenges, we were able to implement solutions to improve the onboarding for future employees.

PROJECT OVERVIEW

In April 2016, two new hires began their employment in the Learning and Research Services department at MSU Library, presenting an opportunity to learn from new employees and improve our onboarding processes. We suspected our onboarding process could be improved if we just understood our current situation a little better. Utilizing journey mapping as a tool, we captured the experience of both new employees over the course of six months, gathering data we then turned into journey maps. We then used that data to make significant improvements to our new employee onboarding process. As Graybill et al. (2013) writes, "by evaluating and making adjustments to both individual performance and the onboarding process itself, organizations can continually improve getting new employees up to speed, retention rates, job satisfaction levels, and performance results" (p. 203).

At a high level, the project goals were to learn about the current onboarding experience, learn about journey mapping as a design research tool for gathering information, and to identify improvement opportunities within MSU Library. The goal of using journey mapping as a specific tool was to highlight those areas of improvement that would enhance employee onboarding experiences from the user perspective, and challenge assumptions about overall hiring practices. Feedback from participants about the project was also solicited and is discussed in a later section.

In addition to these project goals, an unexpected outcome was the creation of an **employee experience journey mapping project toolkit** (Frank & McKelvey, 2017). We did not have a toolkit for our project and felt it would have been helpful, so we created the toolkit to help guide other organizations through their own journey mapping projects. The project toolkit contains necessary documents needed to recreate this project, or variations of it, designed to help improve onboarding at other organizations using journey mapping as a tool. We encourage others to borrow and adapt what we have done for their own use.

THE TOOLKIT CONTAINS:

- **Table of Contents** – Includes links to each section with editable files explained in more detail below, along with a link to a full PDF version of the toolkit.
- **Project Introduction and Outline** – This explains the project in more detail and includes brief information about journey mapping, an overview of the project and goals, and a summary of the project timeline. Use this to help introduce the project to the new employee(s).
- **Timeline and Scheduling Tracker** – Use this to help stay on track while conducting this project. There are a lot of meetings that occur between the project facilitator(s) and new employee(s) and tasks that should be completed in between meetings. This timeline will serve as a reminder for when to schedule meetings and identify what should be completed before each meeting.
- **New Employee First Week Agenda Template** – This template can be used to help define a schedule for a new employee during their first week(s) on the job.
- **Written Reflection Template** – This template of questions can be given to a new employee to help guide them during written reflection exercises. Written reflections are a helpful way to capture the experience of the new employee(s) from their perspective. The questions act as prompts that will hopefully inspire ideas or experiences that they can reflect upon.
- Employee Experience Journey Maps – We have included templates for all three

employee experience journey maps (**day one**, **week one**, and the **first six months**). The files can be downloaded, opened in Google Draw, and modified to fit the scope of your own project.

- **Project Report Template** – This is a final project report template that you can use to record all of your findings. The final report can be shared within your own organization and beyond.

APPLYING THE TOOLKIT

The Timeline

We chose to map the first six months of each new employee onboarding experience, not knowing how time intensive it would be. We started by meeting with participants on their very first day on the job, and worked with their supervisor to arrange an hour meeting as the last activity of their first day. Following this, we met once a week during the first four weeks, and once a month for the following five months. During the first month of the project, each meeting lasted for one-hour and included both new employees.

After receiving feedback from the participants at the end of month one that they would prefer to meet individually, we rescheduled all subsequent meetings and shortened them to 30 minutes for each participant rather than an hour for both (further discussion of participant feedback is included in subsequent section). In addition to meeting with participants, we held separate meetings to review the data being collected and to generate the final journey maps.

Over the course of the six months, we made a number of adjustments to the project, one of them being our projected timeline. We realized the six-month timeframe was too long, making the project very time-consuming. If this project was conducted using a one–three month timeline, even richer information could have been gathered and more focus given to areas needing the most improvement. A shorter timeframe would also narrow the scope of journey mapping; given that a lot happens within an employee's first six months, at times the scope of this particular project felt too broad, leading to an overwhelming amount of information to distill.

We have put together a **Timeline and Scheduling Tracker** to help others stay on track while conducting this project. While the tracker covers up to six months, we recommend you adapt it for a shorter timeframe of one–three months. Many meetings occur between the project facilitator and new employees, with several tasks to complete in between meetings. This timeline will serve as a reminder for when to schedule meetings and identify what should be completed before each meeting.

THE IMPORTANCE OF THE FIRST MEETING

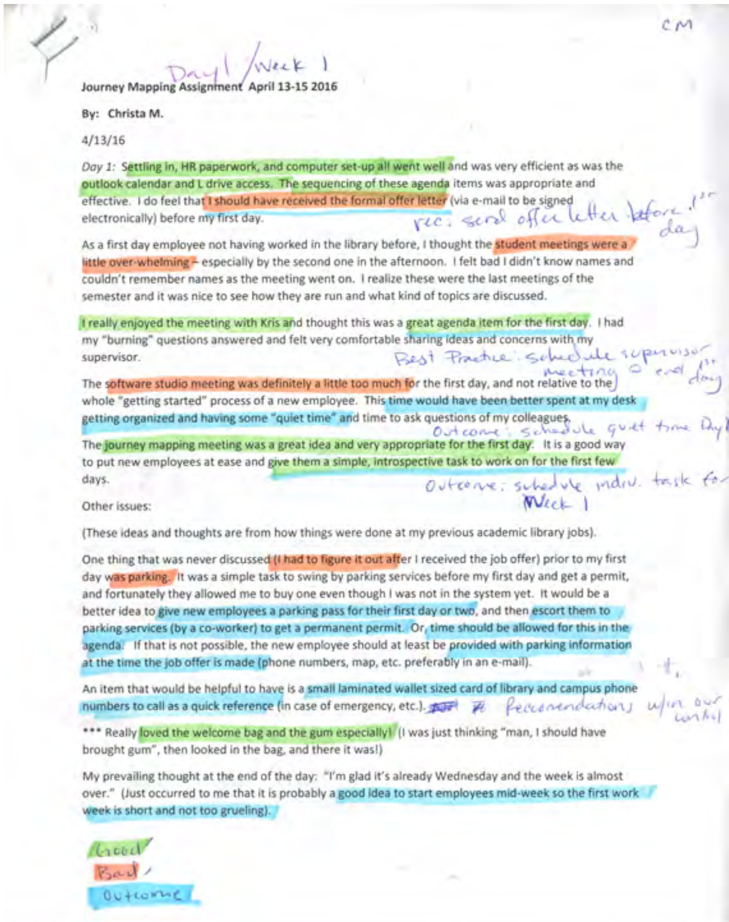
During the first meeting, we gave the employee a printout of the **Project Introduction and Outline**, which explains the project in more detail and includes brief information about journey mapping, an overview of the project and goals, and a summary of the project timeline. After they were introduced to the project, they were given time to write a reflection about their first day on the job. We have included a **Written Reflection Template** that can be given to a new employee to help guide them during written reflection exercises. The questions act as prompts that will hopefully inspire ideas or experiences that participants can reflect upon.

When presenting a project of this nature, it is important to be clear that it is a fact-finding session. At times, our particular project felt like a mentoring session and not always having set, focused questions allowed the new employees to discuss their emotions beyond the scope of the project. The participants occasionally wanted advice for how to navigate particular situations or discuss an interaction with another colleague, thus straying from the specific onboarding task being discussed. Having predetermined, set questions to refer back to helps focus the conversation in this situation as well as reiterating your role in the project.

When conducting this type of project, it is important to be mindful of whether you are conducting the project as a researcher or as a colleague, and understand what lens you are applying. When you present the project to participants, being very clear about your role in the project at the very first meeting will help guide future meetings. Occasionally, in meetings, details were exchanged that were sometimes awkward because employees felt comfortable sharing more information than was initially asked for. To remedy this, we recommend you use an agenda along with the set questions to guide meetings throughout the entirety of the project and keep conversations on track. This will also help in addressing the clarity issue noted above. We have included a **New Employee First Week Agenda Template** to help get you started. Together with the questions in the **Written Reflection Template**, it can be used as a starting place to compile the questions used in the meetings and can be revised with your specific project goals in mind. This technique will also keep responses from the project facilitator neutral and objective. Finally, the agendas serve an important role in creating the "expected journey" section of the final journey map, as we'll see in the next section.

Documenting the Journey

The first step in documenting an experience journey is to document the expected journey—that is, what the journey would or should look like at the outset. We used agendas to do this. Our agendas were drafted by the Learning and Research Services department head for each employee to follow closely on their first day and first week, which outlined the expected onboarding journey. Our agendas extended no farther than this because there was no real expectation about what onboarding looked like beyond that period. The agendas provided very detailed and focused accounts of the new hires expected encounters, experiences, and tasks. It also guided much of the conversation that took place during



CM

Day 1 / Week 1

Journey Mapping Assignment April 13-15 2016

By: Christa M.

4/13/16

Day 1: Settling in, HR paperwork, and computer set-up all went well and was very efficient as was the outlook calendar and L drive access. The sequencing of these agenda items was appropriate and effective. I do feel that I should have received the formal offer letter (via e-mail to be signed electronically) before my first day.

rec: send offer letter before 1st day

As a first day employee not having worked in the library before, I thought the student meetings were a little over-whelming – especially by the second one in the afternoon. I felt bad I didn't know names and couldn't remember names as the meeting went on. I realize these were the last meetings of the semester and it was nice to see how they are run and what kind of topics are discussed.

I really enjoyed the meeting with Kris and thought this was a great agenda item for the first day. I had my "burning" questions answered and felt very comfortable sharing ideas and concerns with my supervisor.

Best Practice: schedule supervisor meeting @ end 1st day

The software studio meeting was definitely a little too much for the first day, and not relative to the whole "getting started" process of a new employee. This time would have been better spent at my desk getting organized and having some "quiet time" and time to ask questions of my colleagues.

Outcome: schedule quiet time Day 1

The journey mapping meeting was a great idea and very appropriate for the first day. It is a good way to put new employees at ease and give them a simple, introspective task to work on for the first few days.

Outcome: schedule indiv. task for Week 1

Other issues:

(These ideas and thoughts are from how things were done at my previous academic library jobs).

One thing that was never discussed (I had to figure it out after I received the job offer) prior to my first day was parking. It was a simple task to swing by parking services before my first day and get a permit, and fortunately they allowed me to buy one even though I was not in the system yet. It would be a better idea to give new employees a parking pass for their first day or two, and then escort them to parking services (by a co-worker) to get a permanent permit. Or, time should be allowed for this in the agenda. If that is not possible, the new employee should at least be provided with parking information at the time the job offer is made (phone numbers, map, etc. preferably in an e-mail).

An item that would be helpful to have is a small laminated wallet sized card of library and campus phone numbers to call as a quick reference (in case of emergency, etc.). Recommendations w/in our control

*** Really loved the welcome bag and the gum especially! (I was just thinking "man, I should have brought gum", then looked in the bag, and there it was!)

My prevailing thought at the end of the day: "I'm glad it's already Wednesday and the week is almost over." (Just occurred to me that it is probably a good idea to start employees mid-week so the first work week is short and not too grueling).

Good

Bad

Outcome

Figure 2. Example of a written reflection after highlighting and review (used with permission).

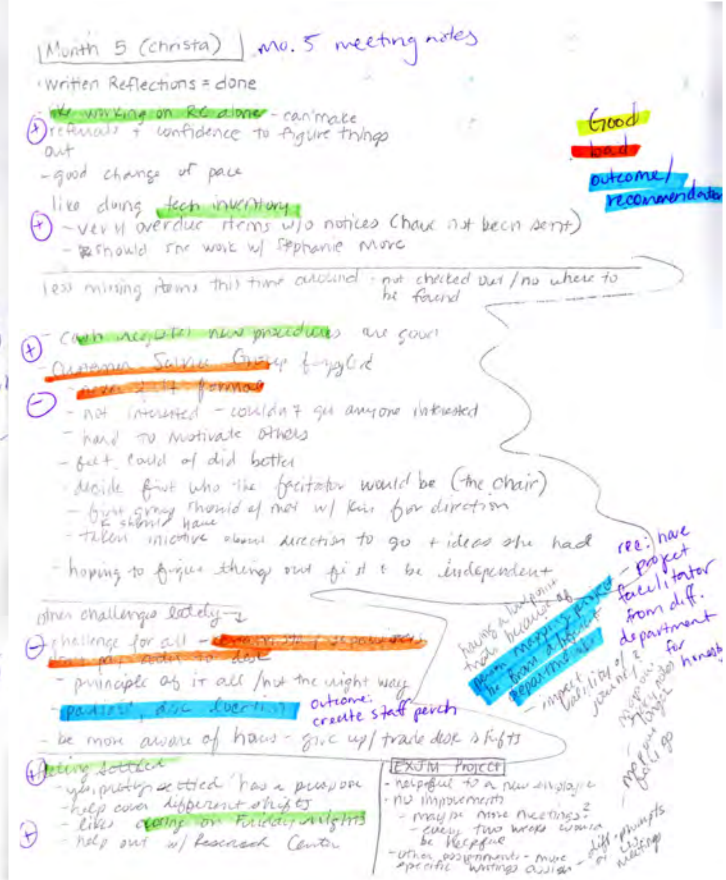


Figure 3. Examples of our meeting notes as project facilitators after highlighting and review (used with permission).

the meetings, as we would ask for details about each item on the agenda. Using the structure of the agendas, it was easy to identify trainings, meetings, and other experiences that went well or could be improved, allowing outcomes and recommendations to easily be identified.

As mentioned before, we met once a week with participants during the first four weeks, and once a month for the following five months. The new employees were asked to write self-reflections in preparation for each meeting, although these were not mandatory. We provided a simple question template to prompt ideas or experiences the employees might consider reflecting on. They were asked questions such as:

- What have been some significant job-related accomplishments?
- What have you been trained to do?
- What do you really like or would really like to change?

These questions were intentionally broad, given our high-level project goals to learn about the current onboarding process and identify areas of improvement, and could be customized based on the goals of another institution. The written reflections form half of the data we analyzed to create the visualization of the actual journey as experienced by the new hires.

Finally, much of the data was gathered during the meetings, where we took many notes while asking questions to learn more about the employee journey. We did not identify specific questions for each meeting, rather, we asked the employees about items on their agendas, what new training they had received, what else they had learned, and how that went from their perspective. Again, our questions were general in nature given the high-level goals and broad scope of our project. If the new employees indicated something went well or did not go well, we asked them why in attempt to identify the underlying reason. This would serve as the other half of the data we mined to form the experience journey visualization.

MAKING SENSE OF THE DATA

This technique generates data in several formats, including the agendas of the new employees, written reflections from participants, and meeting notes in order to visualize the journeys and collect the richest information about the current onboarding experience possible. All this data is eventually synthesized into a visual employee experience journey map. However, the raw data requires some review and preparation. The written reflections and meeting notes, in particular, have to be reviewed to compile information for visualizing the actual employee experience journey, including pain points and positive points.

During review, we highlighted parts of the self-reflections where the employee talked about positive experiences in green, negative experiences in orange, and suggestions for improvements in blue. This identified pain points and good experiences to be included later in the final, visual journey map, as well as opportunities and recommendations for improvements that were noted by each new employee (**Figure 2**).

We reviewed our meeting notes later in the same manner as the written reflections, highlighting pain points in orange, positive experiences in green, and recommendations in blue for easy identification when compiling the final visual journey map (**Figure 3**).

In the next section, we walk through how this data was synthesized into three

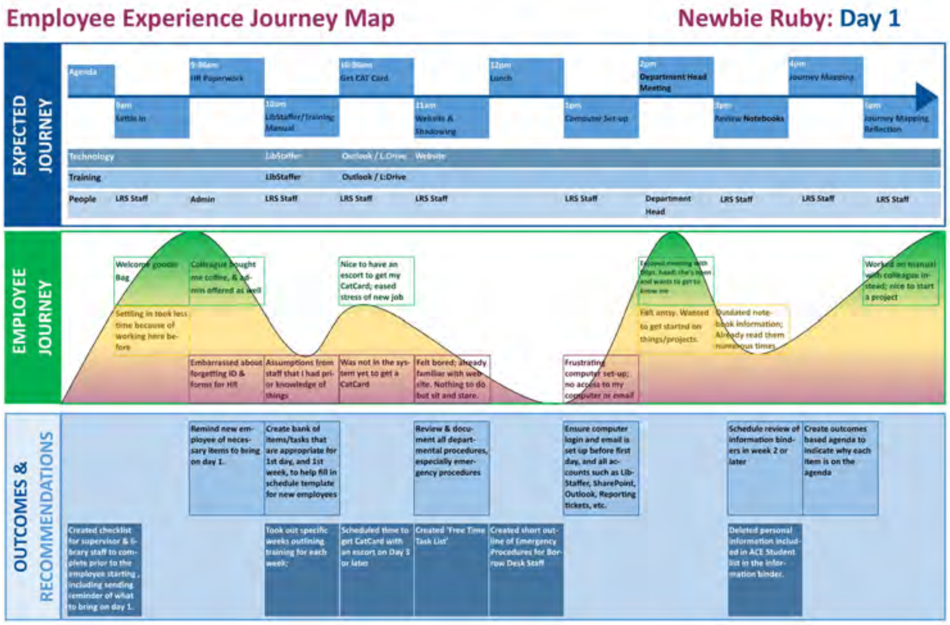


Figure 4. Employee experience journey map for Newbie Ruby's first day.

visual journey maps for each employee according to three key durations of time: a map for the employee's first day, first week, and first six months.

SYNTHESIZING THE EMPLOYEE EXPERIENCE JOURNEY MAPS

We created the original templates for each map using Microsoft Publisher; these newly created templates for day one, week one, and the first six months have been converted to Google Draw, which is a free software. They are available for reuse, and can be found in the EXJM project toolkit (Frank & McKelvey, 2017) included with this article.

There are three main sections of journey maps: the expected journey which situates the context, the actual journey representing the steps a user goes through and how they feel along the way, and finally, the insights gained from the journey leading to potential outcomes and improvements. Each of the three sections can be seen in the templates and in our final journey maps (**Figures 4–10**). All journey maps can be 'read' horizontally through each of the three individual sections, which are laid out chronologically, and also vertically to connect each step of the expected journey with how the new employee actually felt about that experience. They are also linked to any specific outcomes or recommendations that resulted from that step in their journey.

SYNTHESIZING THE EXPECTED JOURNEY

The top section shows the employee's expected journey in chronological order from left to right. We used the first day and first week agendas and laid out the agenda items from left to right in chronological order, showing the meetings, training, events, etc. that each new employee was scheduled for on their first day, and first week. This section does not appear on the six-month journey map, as, again, the expected journey for that period was not explicitly understood.

SYNTHESIZING THE ACTUAL JOURNEY

The middle section visualizes the actual journey experienced by the employee. We reviewed the highlighted written reflections and meeting notes again for the time period captured in each of the journey maps. For each employee, the most painful points, the most positive points, and the points with actionable recommendations or solutions were included first as elements of the actual journey. We summarized each experience in a text box within the middle section, and lined it up underneath the agenda item from the top section representing where in the journey that experience happened. Within this section, neutral experiences are shown in the middle with yellow boxes, positive points are elevated higher toward the upper section of the map in green, and pain points are lower toward the bottom in red. This helps to visualize the difficulties that an employee goes through during the onboarding process.

SYNTHESIZING THE OUTCOMES & RECOMMENDATIONS

Finally, the bottom section shows outcomes and recommendations, and con-

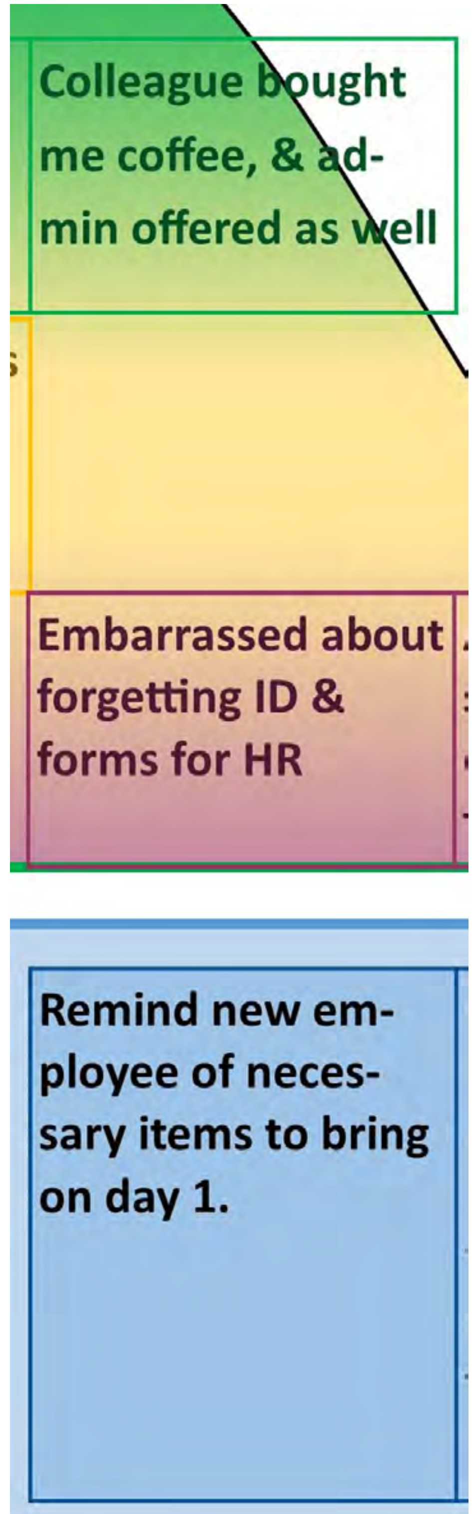


Figure 5. Smaller, zoomed in section of Employee Experience Journey Map for Newbie Ruby's first day.

nects our insights and suggested improvements to the point in the employee journey where that particular opportunity was identified. For this section, we reviewed the written reflections and meeting notes, and summarized the most important and/or actionable items in a text box. Again, recommendations were aligned vertically and placed under the agenda item where it came up in the user experience, showing the connection between what our new employees experienced and recommendations for the future.

INTERPRETING THE EMPLOYEE EXPERIENCE JOURNEY MAPS TO IMPROVE ONBOARDING AT MSU LIBRARY

Since the basis of our project centers around employee experience journey maps, it is important to understand how we interpreted the journey maps and made sense of the information in order to make improvements to the onboarding experience at MSU Library. In this section, we share examples and outcomes specific to MSU. We will walk you through the first day, first week, and six-month journey of Newbie Ruby and compare their journey to the second new employee, Rookie Cookie.

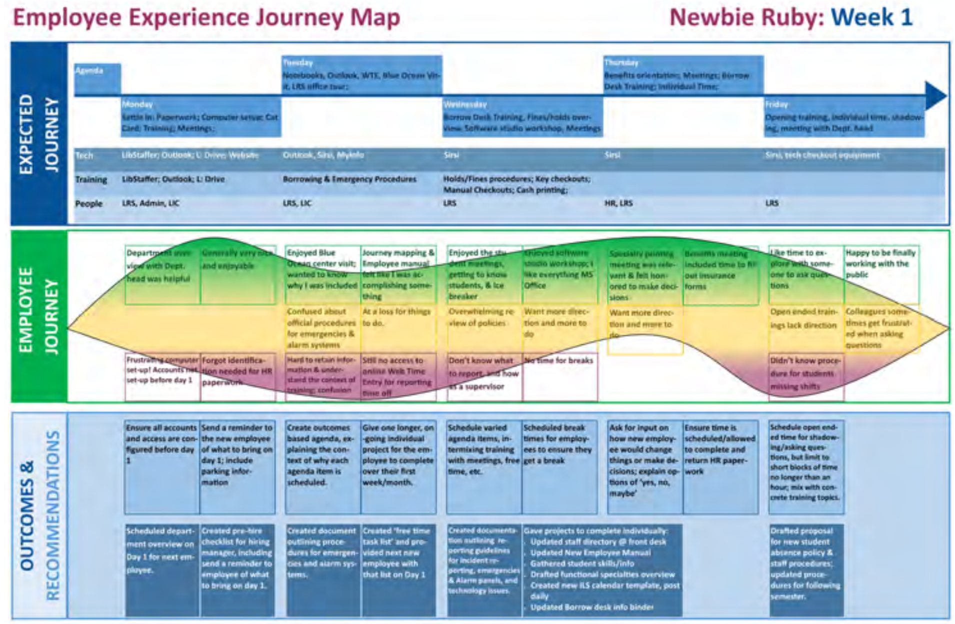


Figure 6. Employee Experience Journey Map for Newbie Ruby's first week.

NEWBIE RUBY

Utilizing Newbie Ruby's first day agenda, we knew exactly what their expected journey should look like for day one (**Figure 4**).

On the first day, Newbie Ruby noted both good and bad experiences. We expected Newbie Ruby to settle in smoothly with paperwork and computer setup, but instead, paperwork was a pain point because Newbie Ruby forgot some of her required documentation, and felt embarrassed (**Figure 5**).

That experience led us to create a checklist for supervisors to use before the employee's first day, which includes sending important reminders and information to the employee on what to bring for their paperwork, where to park, and how to access the building. Luckily, the first day was not all bad for Newbie Ruby, who also expressed feeling welcomed by a friendly colleague offering coffee, which led to our recommendation to schedule someone to take new employees to coffee/tea on their first day. Newbie Ruby ended the day on a positive note by working on a specific project which made them feel productive, leading to a recommendation for assigning a small task or project for the new employee to complete in the first week.

Throughout the first week, Newbie Ruby expressed that they felt lost and without direction almost every day at some point; this led to the creation of a free time task list to give to the employee, listing many different options for projects or training to complete during down times. Newbie Ruby mentioned that one of the workshops they attended during the first week was interesting, but they did not know why they were attending or what they were expected to learn or utilize from the content. This led to drafting an outcomes based agenda template used to highlight the intended learning outcomes of each item, if applicable (**Figure 6**).

Over the first six months, Newbie Ruby noted more negative experiences than positive. (**Figure 7**). Both positive and negative experiences from the first six months led to recommendations for change. For example, Newbie Ruby's positive experience of learning by example led to the idea of creating reference-training exercises compiled from past questions. Their experience of being expected to take on more committee work in a shorter amount of time than was given or approved of by their supervisor led to a recommendation to add information to a new employee manual about the expected timeline for joining committees.

Overall, the journey map (**Figure 7**) shows that Newbie Ruby ran into more roadblocks, questions, and negative experiences in the middle of their first six months of employment, and more positive experiences were noted toward the end in month six. This could be due to new em-

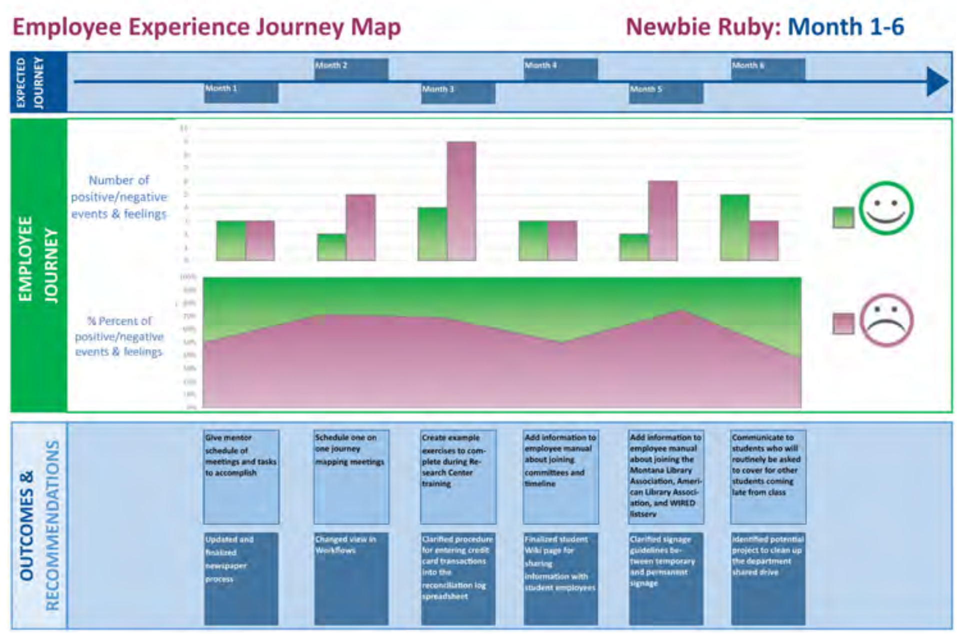


Figure 7. Newbie Ruby's positive and negative experiences over during their first six months.

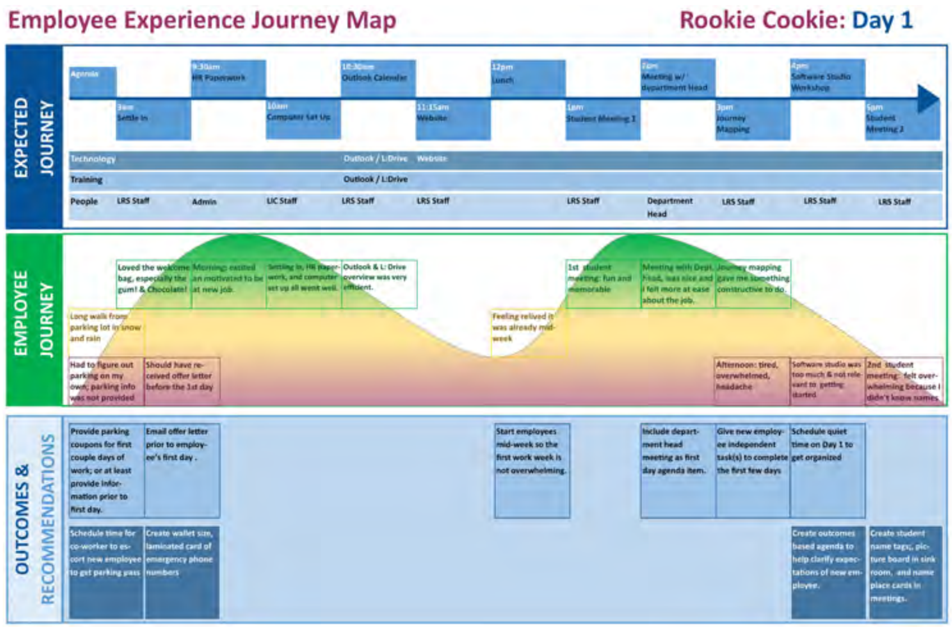


Figure 8. Rookie Cookie's journey during their first day.

ployees naturally having more questions upfront, and hopefully in small part due to some of the immediate outcomes and improvements implemented throughout this process.

ROOKIE COOKIE

It is important to note that Rookie Cookie's first day on the job was two days after Newbie Ruby's. We were able to implement some changes to Rookie's first two days based on what we learned from Newbie Ruby's day one journey.

Rookie Cookie was also given an agenda so we also knew exactly what their expected journey should look like for day one (**Figure 8**).

On day one, Rookie Cookie noted a few negative experiences at the beginning and again at the end of the day, with largely positive experiences throughout the day. The negative experiences starting day one stemmed in part from a lack of knowledge that could have been avoided with previous communication and information provided by the employer. For example, Rookie Cookie noted that parking was difficult and stressful to figure out with no information provided, and that the offer letter was not received before the first day. These led to updating a pre-hire checklist to include a reminder to send parking information and the offer letter to the new employees before they start. Positive experiences throughout the first day also led to recommendations about what to continue doing in the future, including providing a small welcome gift bag and scheduling the employee to attend meetings to get acquainted with other folks in the department. At the end of the day, Rookie Cookie also remembered feeling overwhelmed in a large meeting by not knowing people's names, which led to the addition of name cards in meetings when we have guests and new employees.

Rookie Cookie's first week was shorter, because they started mid-week on a Wednesday, and therefore the first week journey map (**Figure 9**) covers only the first three days of employment.

Day two notes mostly positive experiences, while day one and three show both positive and negative experiences. Training on day two seemed to go well and built tangible skills needed for the job. On day three, Rookie Cookie expressed feeling overwhelmed by meeting so many people on a full-building tour that was combined with introductions to many colleagues; therefore, we recommend that building and workspace tours be scheduled separately from meeting colleagues, and that new employees be introduced to other colleagues one department at a time.

Over the first six months (**Figure 10**), Rookie Cookie noted more positive experiences than negative. Again, as with Newbie Ruby, both good and bad experiences from the first six months led to recommendations. For example, Rookie Cookie found it difficult to explain to our student employees what the expectations were regarding technology troubleshooting and what we expect student employees to be able to help with. This led to the creation of a one-page worksheet with tech-troubleshooting guidelines and reporting form, that students now use to help them walk through the troubleshooting process, and report any issues that persist. Rookie Cookie also expressed being interested in diversity issues, and was then put in contact with the diversity initiatives working group in the library to collaborate with in the future; this positive experience was a reminder to ask new employees about their interests, areas of expertise, and previous experiences that can be beneficial to their new position.

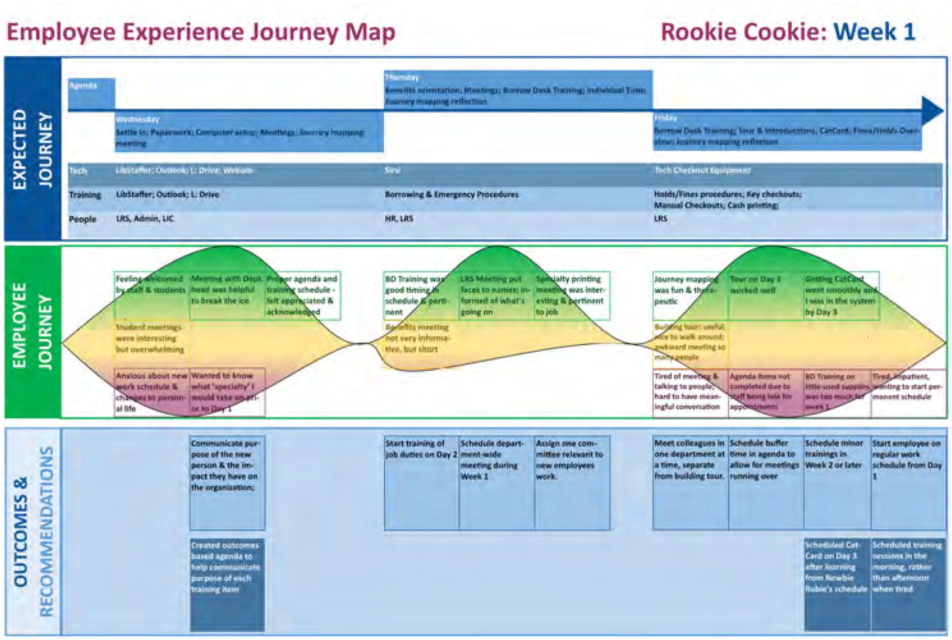


Figure 9. Employee experience journey map for Rookie Cookie's first week, which only consisted of three days.

CONSIDERATION OF BOTH JOURNEYS TOGETHER

Both employees shared positive and negative experiences that led to a deeper understanding of our onboarding practices, and how they both experienced the process as unique individuals. Sometimes they shared similar experiences. For example, both of them were appreciative of meeting individually with their department head at the end of the first day because it made them feel welcomed and they were able to clarify questions. They also both said that they wish the computer setup had gone a little smoother, with more clearly outlined instructions for logging into the computer, email, and creating all their necessary accounts.

Occasionally, recommendations from one employee were implemented immediately, which improved the process for the second employee, such as how they got their university ID cards. On the first day, Newbie Ruby was scheduled to go get their ID card; however, that process did not go well because they were not in the system yet, and they had to return a day later. Knowing that, Rookie Cookie was scheduled to get their ID card on day three instead, and the process went much more smoothly. This led to the recommendation of scheduling that task later in the first week for all new employees.

Over the first six months, Newbie Ruby discussed more negative experiences than positive, and Rookie Cookie discussed more positive experiences. This does not necessarily mean that one had a more positive experience than the other employee, or a more positive experience overall. Rather, it suggests that the positive experiences were more memorable for that employee and therefore were recalled and discussed in meetings and written reflections more often than negative experiences, and vice versa. Regardless, both perspectives of each employee proved very useful, and positive experiences led to recommendations about what to keep the same in our onboarding process, while negative experiences led to recommendations about what to change or improve.

Figure 10. Rookie Cookie's overall emotions during their first six months.

OUTCOMES AT MSU LIBRARY

At a high level, the project goals were to learn about the current onboarding experience, learn about journey mapping as a UX technique for gathering information, and to identify improvement opportunities at MSU Library. All high level goals were successfully met throughout the course of the project. After identifying key challenges and areas of improvement, including lack of documentation, outdated procedures, and inconsistency in the way new employees were oriented to their job, some immediate improvements were made as tangible outcomes of the project. In addition, a list of local, long-term improvement opportunities was provided for future consideration by MSU Library.

Immediate improvements were made at MSU Library as a result of this project included:

- Updating a comprehensive onboarding manual for new employees to help gain consistency in onboarding practices
- Creating documentation and updating procedures for training/daily tasks
- Creating a 'free time task list' for new employees to refer to during down times
- Updating building emergency procedures for quick referral
- Adopting an online scheduling tool for student employees to increase transparency and communication between student employees and supervisors

We also identified long-term recommendations for improvements at MSU Library, including scheduling training sessions with the Office of Disabilities on a yearly basis for all public services employees and new hires. Immediate improvements and long-term, local recommendations were made after new employees identified these specific areas as pain points during the onboarding process. These improvements provided immediate benefits to the Learning and Research Services department and MSU Library, and will improve the onboarding experience for future employees.

» **At a high level, the project goals were to learn about the current onboarding experience, learn about journey mapping as a UX technique for gathering information, and to identify improvement opportunities at MSU Library. All high level goals were successfully met throughout the course of the project.**

» At our institution, the goal of using journey mapping was to highlight areas of improvement that would enhance employee onboarding experiences from the user perspective.

PARTICIPANT FEEDBACK

Throughout the project, we consulted with the new employees often to gather feedback and make sure they were comfortable sharing certain information more broadly. This feedback was used to modify and develop the project timeline, the structure, and it shaped how the project was shared internally and externally. For example, after participants expressed that they preferred to meet individually, the meeting structure was altered to reduce the duration in order to accommodate separate meetings.

Overall, participants expressed feeling comfortable and were able to speak freely during the project, and therefore multiple ideas to improve employee onboarding and library processes were generated. At the end of the project during a retrospective interview with the two new hires, they both noted that while they really enjoyed the project, they would not have felt comfortable saying no to participating on their first day. This highlights a potential challenge for this project if employees are reticent to share honestly when arriving at a new job; for new employees wanting to make a good impression, it could be hard and stressful to start by sharing negative feedback or shortcomings, understandably. While that challenge cannot be removed or avoided completely, some strategies to mitigate the situation would be to designate a project facilitator from an outside department allowing the new employee to share frustrating processes of their new job with someone unattached, delaying the data gathering for a period of time in order to build trust with the new employee, or following up again to gather more data after trust has been built. Finally, even with more limited and tempered feedback from employees who are hesitant to be completely honest, recommendations for improvement can still be identified from what is shared and then acted upon, which can still lead to positive outcomes.

CONCLUSION

At our institution, the goal of using journey mapping was to highlight areas of improvement that would enhance employee onboarding experiences from the user perspective. Utilizing journey mapping as a design research tool allowed us to capture the experience of new employees, and deploy actual changes to the onboarding process within MSU Library. All high level goals were met, and we gained a clear understanding of existing assumptions and the current onboarding culture at MSU Library, while identifying key challenges and areas of improvement.

However, beyond our institution, this project demonstrates potential outcomes and benefits that can be gained by using employee experience journey mapping as a technique to improve onboarding. As our project shows, employee experience journey mapping can be an effective method for learning about current onboarding practices, as well as identifying areas of improvement in any organization. It can also be used to start a conversation across departments within an organization, about where they overlap and how they can work together to create an overall positive experience for employees as well as patrons. Improving the onboarding experience of new employees in libraries is highly important, as good onboarding practices lead to increased retention, employee satisfaction, engagement, and higher productivity (Hall-Ellis, 2014; Snell, 2006). ■

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Succession Planning Through Mentoring in the Library

BY JULIE LEUZINGER AND JENNIFER ROWE

INTRODUCTION

Succession planning is the recruitment, development, retention and advancement of library personnel to fill staffing gaps and prepare future leaders. Succession planning is well represented in the library literature. One book in particular, *Succession Planning in the Library: Developing Leaders, Managing Change,* by Paula Singer and Gail Griffith[1], has had significant impact on the authors' research in this area. For steps on how to put a succession plan together for your library, the authors cannot recommend a better, more practical resource than the Singer and Griffith book[2]. This article builds on the strategies outlined in their book and serves the purpose of integrating mentoring as a crucial component in succession planning. Through a survey of librarians and a review of the library and business literature, the authors explore concepts in succession planning and mentoring. Libraries will benefit from mentoring in succession planning because this combination cultivates knowledgeable and confident employees.

Research Questions

This article answers the following research questions through the combination of library and business literature and survey results:

- Who is responsible for succession planning in the library?
- How does mentoring enhance succession planning in the library?
- What are the challenges involved with succession planning and mentoring in the library?
- When can succession planning through mentoring be applied to other areas of the library besides management?

LITERATURE REVIEW

Research on mentoring in libraries led the authors to the Singer and Griffith book[3] and it was in this text that the relationship between succession planning and mentoring became apparent, along with the possibility that mentoring can greatly enhance succession planning. Though succession planning in libraries is well represented in library literature, enriching succession planning with mentoring has not received much attention. A search on "*succession planning" and mentor** in EBSCO Library and Information Science Source produced twelve articles dating back to 2004.

Business literature has covered succession planning since at least 1961[4] and mentoring tied to succession planning since the late 1990's,[5] which is around the time librarians start adding to the literature on succession planning in general.[6] The library literature provides information on a leadership mentoring program at a specific library,[7] an article about a particular learning and education model applied to a group of academic librarians,[8] research on capturing and transferring institutional knowledge,[9] a description of a Caribbean academic library that identified the needed skills for their academic librarians to guide them in employee selection and succession planning[10] and an article on succession planning being the next step in "vision building."[11] In addition, library literature offers a study on formal and informal mentoring programs,[12] guidelines on succession planning for business librarians,[13] survey results from a peer generational study that could have an impact succession planning,[14] an article highlighting the contributions an individual made to succession planning,[15] a task force recommendation[16] and highlights from a conference.[17] One library-related article comes within range of touching on the concept of succession planning through mentoring: an article about an Association of Research Libraries (ARL) mentoring program meant to "prepare the next generation of library directors" through the collaboration of ARL member libraries.[18]

So what was learned from this search? There is library literature on succession planning and there is library literature on mentoring, but there is really no library literature that clearly states the benefit to the library organization and staff by specifically incorporating mentoring throughout the succession planning process. Mentoring appears to be only mentioned as an afterthought in most of the articles. Therefore, the authors of this paper chose to explore these concepts and the research questions through business literature and survey results below.

METHOD

For this research, the authors created a twenty-five question survey including a request for basic demographic data in the survey including: type of library (academic, public, school or special), job title (support staff, librarian, middle management or administration) and number of employees in the library (ranges 1 to 10, 11 to 50, 51 to 99 or 100+.) Survey participants were provided with a definition of succession planning, as given in the introduction of this article, and asked that they respond to the statements to the best of their ability based on their impressions or direct knowledge. The survey offers a set of thirteen succession planning questions as well as a set of nine mentoring questions. For all of the questions the authors provided an "I don't know" option given this information could also be valuable in the analysis. Finally, respondents were asked if they had a succession plan available that they were willing to share; unfortunately no survey participants shared their library's succession plan. A full list of survey questions may be viewed here (Appendix A.)

The survey was tested internally, then reviewed and approved by the University of North Texas Institutional Review Board. Non-probability (or non-random) sampling was used by posting the survey to the American Library Association email lists and Paula Singer, co-author of *Succession Planning in the Library,*[19] sent the survey to her Singer Group client list. While the survey was sent out to the appropriate audience, the respondents were all self-selected. Snowball sampling was likely also a factor, given the survey was likely forwarded from participants to other interested individuals. The authors, therefore, do not claim the results are representative of the current state of succession planning through mentoring within all libraries. The authors do believe that their survey results provide some beneficial information to determine the next stages of research for themselves or other researchers interested in contributing to the available literature on this topic.

RESULTS

The survey received 261 total responses, however, 31 participants dropped out of the survey after the basic demographic data questions (type of library, job title and number of employees.) Responses that only contained demographic information were excluded from the following analysis. When appropriate for analysis, the authors used pairwise deletion of missing responses.

Of the remaining 230 responses:

- By library type o 43% -academic libraries o 43% -public libraries o 13% -school libraries o 1% -special libraries
- By job title or job description o 12% -support staff or paraprofessionals o 32% -librarians o 15% -middle management o 41% -administration
- By library size o 24% -1 to 10 employees o 30% -11 to 50 employees o 18% -51 to 99 employees o 28% -100 or more employees
- Has a succession plan in place o 24% -have a succession plan o 60% -did not have a succession plan o 16% -didn't know
- Has a formal mentoring program o 23% -have a formal mentoring program o 74% -do not have a formal mentoring program o 3% -didn't know

Public library survey participants more frequently have succession plans in place than participants from other library types, at 34% (**see Table 1**). Academic library respondents comprised the plurality of those respondents that either do not know if they have a succession plan or do not have a succession plan in place, at 46%. For the remainder of this analysis, the authors use "has a succession plan" and "has a formal mentoring program" as the independent variables, believing these variables have some influence over the responses, based on findings from the literature. In addition, for the remainder of this paper the authors will abbreviate succession plan as SP and mentoring program as MP. These survey results are then tied back to the research questions mentioned above. Full results of the survey may be found in the Institutional Repository at the University of North Texas Libraries http://digital.library.unt.edu/ark%3A/67531/metadc848632/.

Table 1: Library Type
("I don't know" responses excluded from table)

	Has Succession Plan	Has Mentoring	Succession Plan & Mentoring	No Succession Plan & No Mentoring
All Library Types	24%	23%	16%	49%
Academic	18%	25%	4%	49%
Public	34%	17%	14%	62%
School	14%	39%	7%	50%
Special	25%	0%	0%	50%

HAS A SUCCESSION PLAN (SP)

Some of the findings from the survey were as expected given that the literature demonstrates the benefit of implementing SPs within organizations. Survey responses indicate that organizations with no SP in place are far more likely to have leadership vacancies for over twelve months (59%) than those who do have SPs in place (18%). Individuals who are interested in leadership roles are far more likely to seek employment outside of their organization when no SP is in place. Of the total survey respondents, 57% responded that individuals frequently look for work outside their library in organizations with no SP compared to only 14% in organizations with a SP.

Having a SP in place, according to the survey results, may indicate greater transparency within an organization. Survey respondents report that reasons for promotions from within are not stated at all at 77% when no SP is in place compared to 9% when the organization has a SP. In addition, 68% who stated leadership opportunities are provided for only a select few do not have a SP in place while only13% responded the same that do have a SP. Transparency can lead to greater trust and engagement and therefore employee retention, which has the potential to benefit an organization.

HAS A FORMAL MENTORING PROGRAM (MP)

Of the 23% of respondents who have a formal MP in their library, 56% said that there is support from all levels of management and leadership for mentoring and 38% said that there is support from some levels. Of the 73% who do not have a formal MP, 22% stated that there is support from all levels of management and leadership for mentoring and 51% said there is support from some levels.

One of the hallmarks of mentoring is asking staff or mentees their long term career goals or aspirations. 58% of survey respondents in libraries with MPs stated that they have been asked their career goals, 40% have not been asked, compared with those with no mentoring, 50% stated they have been asked and 50% stated they have not been asked. Another central feature of mentoring is providing staff with challenging or stretch assignments to expand their skills. Of the survey respondents who work in libraries with MPs, 35% answered that they sometimes receive challenging assignments, 48% frequently receive challenging assignments and 17% always receive challenging assignments compared with those libraries without mentoring: 6% stated they never receive challenging assignments, 46% stated they sometimes receive challenging assignments, 33% frequently receive challenging assignments and 16% always receive challenging assignments.

HAS A SUCCESSION PLAN (SP) AND A FORMAL MENTORING PROGRAM (MP)

9% of respondents have both a SP and a

MP and should be reviewed here in detail compared to the 49% who do not have a SP or MP in their library (**see Table 2.**) The comparisons below show a likelihood of greater engagement on the part of the organization and staff member when a SP and a MP are in place as opposed to those libraries with no SP or MP.

The survey results below are generally predictable given the literature discussed in this paper. There was some discussion between the authors that we expected the percentage of individuals who sometimes look for leadership roles outside their library would be higher in the neither succession planning nor mentoring group than the both group; however, central tendency bias in survey respondents could be one explanation to this exception given individuals might be less likely to select extremes such as always or never. In addition, the authors expected support for leadership and mentoring in libraries with neither a succession nor a mentoring plan should be lower than in libraries with both succession planning and mentoring; however, this table does not take into account the libraries that had one or the other, SP or MP, as a possible explanation for the percentage given (54% support from some levels). The benefits of having both a SP and a MP will be outlined in greater detail through the research questions and discussion further in this paper.

Table 2: Comparison (Has both succession plan and mentoring/ Neither succession plan nor mentoring)

	Both succession plan and mentoring (9%)	Neither succession plan nor mentoring (49%)
Individuals who are interested in leadership roles are likely to seek employment outside my library		
Never	5%	3%
Sometimes	80%	51%
Frequently	10%	26%
Always	0%	11%
Don't know	5%	9%
The path to leadership is clearly defined		
Strongly disagree	10%	24%
Disagree	25%	46%
Agree	45%	22%
Strong agree	20%	3%
Don't know	0%	5%
When promotions do occur from within, reasons for promotion are...		
...not stated at all	10%	27%
...stated informally	45%	33%
...stated clearly	40%	26%
Don't know	5%	14%
My library provides leadership opportunities for...		
...no one	0%	14%
...a select few	20%	41%
...anyone who expresses interest	70%	41%
Don't know	10%	4%
My library has support from all levels of management and leadership for mentoring		
Yes, support from all levels	75%	17%
Support from some levels	20%	54%
No support at all	0%	24%
Don't know	5%	5%

WHO IS RESPONSIBLE FOR SUCCESSION PLANNING IN THE LIBRARY?

Several articles focus on who bears responsibility for succession planning. Some authors suggest that human resources professionals,[20] managers,[21] advisory boards[22] and administration within the organization are responsible; however, the successor or mentee is identified as a significant and active participant.[23] Veteran employees can help identify knowledge and skills gaps to assist in the succession planning process, which has the additional benefit of showing these employees their significance to the organization.[24]

Professional associations can also be a valuable resource and should be seen as collaborators in the area of succession planning and mentoring.[25]

Of the survey respondents in libraries with a SP, 60% strongly agree that the path to leadership is clearly defined, verses only 3% of those without a SP responded that they strongly agree that path to leadership was clearly defined. This result supports the assertion that topdown communication from human resources, managers and administrators plays a key role in succession planning within the library. Current leaders do need to ask individuals about their career goals[26] for any SP to work effectively. This feedback should be used to provide opportunities for professional growth based on their stated career goals. These consultations will allow current leadership to identify potential future leaders for the organization. While many are involved, full support from top organization leaders is required. It cannot be only mid-level managers mentoring staff.[27]

HOW DOES MENTORING ENHANCE SUCCESSION PLANNING IN THE LIBRARY?

Mentoring can enhance and influence a SP in positive ways for both the individuals involved and the organization as a whole. The mentee receives "benefits such as increased self- esteem, strength of interpersonal bond, confidence, identity and socialization... and careerrelated benefits such as promotion, increased compensation, career development, and increased job satisfaction."[28] Mentees will also experience a greater understanding of the organization as a whole.[29] Survey responses also indicate the mentee is likely to benefit from promotion. For example, libraries with both succession planning and mentoring (9% of respondents) are highly likely to promote from within to middle or upper level management at 45%, compared with those who only have a SP (24% of respondents), of which only 36% report that their libraries are highly likely to promote from within. These survey results mirror what is found in the literature in regards to promotion, succession planning and mentoring.[30]

The mentor will likely see "career revitalization, social recognition, personal satisfaction, increased power, leadership skill development, and supervisory and training ability development…at the organizational level, mentoring benefits include increased organizational commitment, employee retention, employee motivation, leadership development, improved organizational communication and productivity."[31] Survey results support that libraries with both succession planning and mentoring in place always have current employees who want to take on leadership roles (at 55%), but libraries with succession planning only (31%) stated they always have employees who want to take on leadership roles.

There are benefits to a mentee for having a "mentor network" of both formal and informal mentors for greater employee success. Having a "mentor network" also supports the mentee's need for different mentors at different points throughout his or her career.[32] In addition, experiences outside the mentor/mentee relationship are important for growth in the field, not just for the specific job. These experiences help the mentee develop a professional identity and interests that are unique from that of his or her mentor.[33] Haynes and Ghosh note that "mentoring and succession management are aimed at leadership development [therefore] organizations sponsoring MPs supplement their SPs with the internal pool of groomed leaders"[34] creating a broadened "leadership pipeline"[35] of individuals ready to step into key roles in the organization.[36] The survey results align with the literature in that 80% of respondents with both a SP and a MP in their libraries have employees ready to step into management positions today. Of the 49% of organizations with no succession planning or mentoring at all, only 26% stated they have employees ready to step into management positions today. The corresponding numbers for those ready in six months with training and mentoring may indicate that respondents see the value in including support for their staff by way of a SP that includes mentoring. The results also indicate that having staff development in place by way of a SP with mentoring will assure that organizations have a much broader pool of future ready leaders.

Table 3: My library has employees who already possess the skills to step into management or administrative positions if they become vacant today ("I don't know" responses excluded from table)

	Succession Plan & Mentoring	Succession Plan Only	No Succession Plan	No Mentoring	No Succession Plan & No Mentoring
Employees ready today	80%	55%	38%	32%	26%
Employees ready in 6 months with training & mentoring	20%	45%	54%	49%	47%
No employees ready today or within 6 months	0%	0%	18%	16%	23%

Additionally, the organization will find these efforts help to create more of a seamless shift from one group to the next[37] due to knowledge sharing.[38] Less employee turnover and greater staff productivity are realized when mentoring is incorporated into a SP.[39] Other research shows that mentoring (both formal and informal) are vital to effective succession planning[40] and in the long run, will save the organization time and money.[41] One study states there is a 30 percent increase in "human capital expenditures" over a ten-year period when there is an absence of succession planning and mentoring.[42] Another author claims a lack of succession planning and mentoring leads to poor management in an organization.[43] In general, succession planning and mentoring are considered by business researchers to be best practices along with networking, job assignments and action learning.[44]

One specific study from the business literature that has impacted this study is, "Mentoring and Succession Management: An evaluative approach to the strategic collaboration model" by Ray Haynes and Rajashi Ghosh published in *Review of Business* in 2008.[45] Hayes and Ghosh highlight "Wasburn and Crispo's Strategic Collaboration Model (SCM)[46]… [which] is one of the few succession management models that incorporate mentoring as an essential mechanism in fostering leadership development and succession."[47] The authors summarize that "mentoring can be viewed as a means of increasing the effectiveness of succession management programs… The SCM is a phased and distinct model because it is mentoringcentered, and uses appreciative inquiry to help the organization and its succession candidates."[48] This article highlights a specific example in which mentoring can enhance succession planning.

WHAT ARE THE CHALLENGES INVOLVED WITH SUCCESSION PLANNING AND MENTORING IN THE LIBRARY?

With any plan or effort there are always challenges and the organization should determine if the positives outweigh the negatives. The success of a MP can depend on intangibles such as the rapport and connection of the mentees and mentors. Potential pitfalls of MPs include: some mentors will not be as involved, personalities may not match[49] or there may be little incentive for the mentor to invest the necessary time in the mentoring relationship. While there is value in formal MPs, informal mentoring should be encouraged as a way to ensure that mentoring is ongoing, even when formal MPs exist and certainly when they do not exist.[50]

There is work involved with maintaining mentoring relationships and SPs. The challenges of caretaking for MPs and SPs are very similar. For both types of plans, updates should be made periodically[51] as participants' goals may have evolved, individuals' situations may have changed or the organizational focus may have shifted. Both succession planning and mentoring require a time investment on the front end to establish, but the experience can be meaningful for all involved.[52] For example, creating those stretch assignments[53] takes time on the part of the manager or mentor; however, these efforts do help in keeping people interested[54] and motivated to continue in their jobs. Managers and mentors need to be willing to have honest discussions with staff about skill gaps, which is something that is not easy for everyone. Also, the employee needs to be willing to be coached.[55] Many times, day-to-day work can take priority over succession planning and mentoring[56] as well as time and scheduling conflicts,[57] and sometimes it is difficult to have access to high-level executives as mentors.[58]

Other challenges in incorporating mentoring into the SP can include overcoming a lack of resources or developmental opportunities[59] and ensuring the program supports the organization's goals[60] and the strategic plan.[61] Time and effort are required and many organizations will wait to consider succession planning until the last minute[62] when several key employees are retiring within a short period of time. These organizational succession planning and mentoring efforts should be transparent.[63] Succession planning should not be for a select few, but for all employees in the organization.[64] Ensuring that a diverse body of employees are receiving mentoring and thus being groomed for succession is crucial to the organization's future.[65] Also, many see succession planning as someone else's job so it is pushed aside.[66] Finally, much of the assessment research is based on participant satisfaction and not the return on investment for the organization; therefore, return on investment needs to be moved to the forefront of the conversation about succession planning and mentoring, to ensure that all individuals involved will understand the value in putting in the time, resources and effort for the benefit of the organization as well as the staff.[67]

WHEN CAN SUCCESSION PLANNING (SP) THROUGH MENTORING BE APPLIED TO OTHER AREAS OF THE LIBRARY BESIDES MANAGEMENT?

Succession planning through mentoring can be used for general "knowledge sharing," for staff development, other areas of specialization (both technical and front line managers)68 and "non-vertical" career growth.[69] Succession planning and mentoring needs to include others outside of management; however, most of the literature focuses on upper level management. Consideration should also be given to creating plans for entry level catalogers, new subject librarians, supervisors of part-time staff or volunteers, or support staff in general. Attention given to succession planning in these area can only make the organization stronger, with more knowledgeable staff, and can lead to greater staff engagement and morale.

The author's survey posed a question specifically to gauge the correlation between the practice of hiring outside the library field due to a lack of qualified candidates with an MLS or paraprofessionals with library experience and whether or not organizations have mentoring or succession plans in place. According to the survey results, those organizations without a succession plan in place are far more likely to have to hire someone from outside the profession (60% vs. 15%). Hiring outside the field can be beneficial to an organization and can bring in new perspectives. These skills outside the traditional MLS can be incorporated into a succession planning and MP by bringing in staff from different backgrounds to share those skills with current staff.

DISCUSSION AND RECOMMENDATIONS

The library literature emphasizes the urgent need for libraries to implement succession planning, due to the aging demographic of managers and administrators.[70] Another reason to prioritize mentoring and succession planning is high turnover among Millennials and Generation X employees. These groups expect development which promotes both recruitment and retention as well as employee engagement.[71] Implementing succession planning programs requires buy-in from all levels of an organization and takes a significant amount of time and dedicated resources. Not all organizations have the capacity to support succession planning or MPs, which may be why only 24% of the survey participants reported that their libraries engage in succession planning. The survey results also highlight a potential concern for libraries—only 30% of respondents indicated that their library has employees who already possess the skills to step into management or administrative positions if they become available today (compared to 55% in libraries with a SP).

Mentoring should be a central component to succession planning. MPs can facilitate leaders being identified and prepared for leadership and other key roles within the library. This study combined with the literature provides evidence to libraries that adopting MPs may enhance their SPs. This study shows public libraries leading the way in succession planning (34%), and a significantly higher percentage of school libraries reported having mentoring plans (39%) than SPs. Perhaps librarians in other types of libraries should look to public libraries' accomplishments in succession planning and school libraries' achievements in mentoring as well as consider leveraging existing MPs, to support succession planning efforts, to maximize benefits and minimize resources spent on succession planning.

Organizational mentoring that facilitates the organization reaching its strategic goals and meeting current and future staffing needs is one type of MP that directly supports succession planning.[72] An organizational MP should be available to all, including support staff. As Singer and Griffith outline, identifying the competencies that "key positions" have in common, with the intent of building these up within all staff, is a great place to start.[73] This approach can also serve to increase the diversity of the leadership pool within the organization; therefore, mentoring can be employed, not just to prepare leaders but to support employees with very specialized skillsets and to assure there are suitable successors to assist or replace them if they leave the organization.

Elements of effective mentoring that should be included in succession planning are:

- Asking mentees to identify their career goals and aspirations
- Assigning tasks that challenge mentees and cultivate new skills and/or experience
- Requiring mentees to self-inventory their key skills
- Providing sponsorship or coaching for mentees from older, more experienced professionals
- Protection for the mentee or advocacy on behalf of the mentee, by the mentor74

Another point about mentoring is that having a network of mentors, such that one person has many different mentors, possibly different mentors for different aspects of professional life, is ideal and should be encouraged.

This study shows the advantages of adopting SPs that include MPs. The authors encourage libraries to adopt, as part of their succession planning efforts, not just the kind of MPs that orient new employ-

» **To be successful, succession planning and MPs within any group or organization require effort, time, thoughtfulness, and a coordinated effort from the entire organization.**

ees to the organization, but continuous organizational programs that promote the strategic goals of the entire organization, identify potential leaders, and cultivate leadership skills in all employees across the library. Many libraries simply will not be able to devote the needed resources and support to these programs. For this reason, professional organizations should be acknowledged for the work they do to mentor future library leaders, which is crucial to the growth of the profession. The authors wish to highlight the need for more of these types of programs.

The ARL Research Library Leadership Fellows Program, briefly mentioned earlier, is one such example. In this program, nominated candidates are mentored and prepared to step into senior library leadership roles. The participants in this program must already be in leadership roles and a want to prepare to be directors/deans of large research libraries. Over a two year period, cohorts participate in specialized leadership development experiences and strategic issues institutes, and visit sponsoring libraries—which includes shadowing a director/dean. In addition, participants receive a 360 degree personal assessment, and are afforded opportunities to be involved in meetings of ARL and other key groups. Participants receive mentoring, coaching, and complete a research project as a part of the Fellows Program.[75]

An additional example of professional organizations stepping up to provide needed developmental opportunities is the National Library of Medicine's and Association of Academic Health Sciences Libraries' Leadership Fellows Program. The program prepares emerging leaders for positions as directors of health sciences libraries, in large part through mentoring. Participants are paired up with current library directors, on the basis or their interests and expertise. Two-week site visits to mentor libraries give participants leadership perspective at a different library.[76]

The American Library Association's Public Library Association (PLA), offers the PLA Leadership Academy which is an immersive 4-day program for public librarians with five years of "increasingly responsible experience in a public library" with coaches from library leadership and city management, culminating in a project proposal to put in place at their home library. School librarians may attend the Lilead Fellows Program, which is another professional development program, but not specifically sponsored by a professional organization.[77] In addition, many state library associations offer programs to support librarians within the state in leadership development. The American Library Association provides a full listing of state and national Library Leadership Training Resources at their organization web site.[78]

Regional groups or consortia could also become leaders in these programs to lessen the burden on libraries. This could include job shadowing for developmental purposes between libraries within the region and could have the added benefit of broadening an individuals' mentor network. These groups could share any financial resources or staff time commitments and possibly yield the same gains as one library might take on individually.

CONCLUSION

This article outlines both the benefits and challenges to employees, the library and the profession when succession planning and mentoring are part of the organizational culture. The review of the literature and survey results offer support to the need for inclusion of mentoring in succession planning and lead into the next steps for study in this research area.

Further study may come in the form of connecting, facilitating, coordinating, and assessing pilot programs for regional or consortia groups, since it may not be realistic for some organizations to take on this level of effort on their own. Thoughtful collaboration here is the key to success in this type of coordinated effort.

In addition, further investigation of Wasburn and Crispo's Strategic Collaboration Model[79] as referenced in the Haynes article[80] should be included in the next steps of this research. The Model concentrates on both succession planning and mentoring, and the positive approach of the Model that focuses on what is working well instead of what is not working, should be explored further. The Strategic Collaboration Model also leverages the strengths of the "mentor networks" as referenced earlier in this article. Essentially, "Strategic Collaboration retains all of the positive benefits of mentoring while avoiding the pitfalls that can plague the mentoring process. It provides a positive group of individuals, two of whom are senior members of the organization,"[81] so the team aspect appears to be its key to success. As with succession planning efforts at an individual library, however, this would again require buy in from several stakeholders.

To be successful, succession planning and MPs within any group or organization require effort, time, thoughtfulness, and a coordinated effort from the entire organization. The authors believe that evidence gathered from the literature and from the study reported here support the notion that succession planning and mentoring can be effective and work synergistically within a library, to produce employees who are better prepared to take on new tasks, to the benefit of the entire organization. ■

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NOTES
APPENDIX A

OneButton

» A Link Resolving Application to Guide Users to Optimal Fulfillment Options

BY LAUREN MAGNUSON, KARL STUTZMAN, ROGER PETERS, NOAH BRUBAKER

INTRODUCTION

When the Private Academic Library Network of Indiana (PALNI) migrated to OCLC's WorldShare Management Services (WMS) in 2014, it was a key opportunity to increase PALNI's collaboration around resource sharing. Although PALNI had offered a shared catalog and reciprocal borrowing agreement since its inception in 1992, patrons could not request delivery of materials between PALNI locations except via the traditional InterLibrary Loan (ILL) system. This reliance on ILL codes and practices as the mechanism for resource sharing stymied efforts to build collaboration within the PALNI consortium on collection development because libraries had no guarantee of being able to rely on PALNI partners for faster fulfillment or consistent, generous lending policies. This reliance on traditional ILL for delivery also limited PALNI's ability to distinctively brand its services for faculty and staff at its member institutions and brought into question the value of a catalog search that retrieved items across the PALNI consortium. PALNI libraries noticed a strategic opportunity in moving to a resource sharing system that would integrate closely with its discovery and circulation systems to deliver physical materials with fewer procedural hurdles than traditional ILL. An integrated consortial resource sharing system offered options for limiting requests to available copies and implementing consistent loan periods among partner libraries.

The PALShare system was born as PALNI's implementation of the OCLC WMS group circulation features. In addition to improving turnaround time for resources held within the PALNI consortium, PALShare has become the "face" of PALNI to faculty and students at PALNI's 22+ supported institutions spread across the state of Indiana. Because of the resource sharing policy guarantees in PALShare, PALNI libraries have begun making purchasing and retention decisions based on whether other libraries in PALNI already hold a copy of an item, freeing up critical space and funds for the libraries to extend their services and realizing a long-held vision of collaborative collection development.

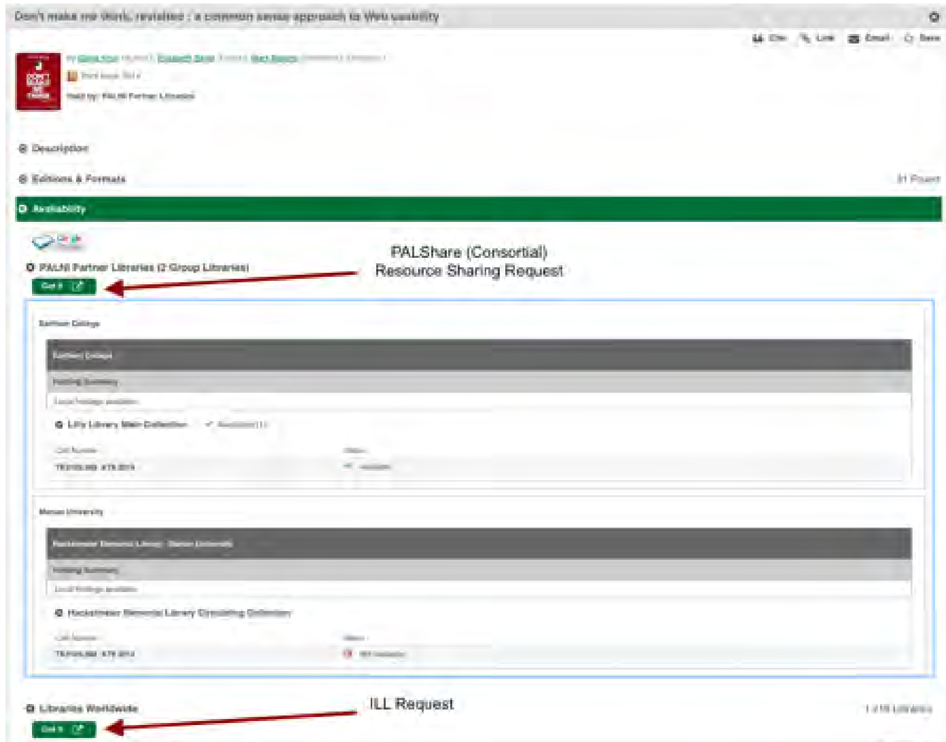

Figure 1. Multiple request buttons appear in an item record in the discovery system. The first Get It button, if clicked, directs users to a consortial request form; the second Get It button directs users to traditional ILL (ILLiad or WorldShare ILL, depending on the institution). End users may not know why there are multiple request buttons, or which button would be the optimal request button to click.

Still, even as it solved some long-standing issues for PALNI's libraries, the successful implementation of PALShare created new problems. Of those issues, the most significant was that a new resource sharing option introduced potential user confusion: should they request an item from PALShare or the traditional ILL network? Multiple request buttons appeared on the PALNI libraries' search interfaces of WorldCat Local and WorldCat Discovery [**see Figure 1**]. At the same time, other partnerships across the state of Indiana began to emerge to increase resource sharing beyond traditional ILL, including a separate direct borrowing system that was largely designed to serve smaller public libraries. Complex user interfaces and multiple incompatible systems threatened to hinder the progress the PALNI libraries were making on resource sharing. Expanding the resource sharing options was leading to button confusion.

From this context of improved resource sharing options and the attendant button confusion, PALNI librarians began to dream of "one button" that would sensibly navigate the various resource sharing options for patrons. A single button that would intelligently direct users to their best resource sharing option was tempting because it offered some flexibility for integrating a variety of emerging resource sharing options without thoroughly confusing the user.

APPLICATION DESIGN

The end goal of the application was to build

```
<holdings>
 <holding>
  <typeOfRecord>x</typeOfRecord>
  <encodingLevel>z</encodingLevel>
  <format>zu</format>
  <receiptAcqStatus>0</receiptAcqStatus>
  <generalRetention>8</generalRetention>
  <completeness>4</completeness>
  <dateOfReport>160421</dateOfReport>
  <nucCode>OCPSB</nucCode>
  <localLocation>WEST</localLocation>
  <shelvingLocation>WEST-STACKS</shelvingLocation>
  <callNumber>PR9199.4.J336 K55 2009</callNumber>
  <copyNumber>2</copyNumber>
  <volumes>
   <volume/>
  </volumes>
  <circulations>
   <circulation>
    <availableNow value="0"/>
    <itemId>3456789988</itemId>
    <renewable value="0"/>
    <onHold value="0"/>
    <reasonUnavailable>DISPATCHED</reasonUnavailable>
   </circulation>
  </circulations>
 </holding>
</holdings>
```

Sample code 1

an OpenURL resolving tool that handled user requests for material by choosing the best fulfillment option for a user without the user having to think about which fulfillment option would be best [**see Figure 2**].

The application is configured as an OpenURL resolver for WorldCat Local or WorldCat Discovery. Configuration options for the display of OpenURL resolver and place hold buttons for WorldCat Local and Discovery are available in OCLC Service Configuration, which enables libraries to choose OpenURL resolver links to display based on item format (e.g., book, article) and availability (held by PALNI, held by libraries worldwide, etc.). This enabled the application to be built with the understanding that OneButton would only display for monographs that have consortial holdings (in print), as all other resource sharing for other formats (articles, media, etc.) is currently handled only through traditional ILL and never by consortial resource sharing.

From the user's perspective, no matter how many fulfillment options are technically available to them (retrieve the item from the shelf, place a PALShare request, or place ILL request) they will only see "one button" for requesting items [**see Figure 3**]. The button also appears on items that are held by the user's home institution. It was determined that the button should appear on items that are held by the user's home institution so that users can potentially request items through consortial borrowing that are held by the home institution but not available there (checked out or non-circulating). Some libraries in the consortia also enable users to place 'on-shelf holds,' effectively paging the item and triggering a workflow in WMS to retrieve the item from the shelf and place it on hold for the user.

It was theorized that some users, when looking at a print book held and available by the user's own institution, may not know what the next step is in order to borrow the item – they may not know enough about how libraries usually work to know that they can go up to the item's shelving location to retrieve the item themselves.

The application is written in PHP and leverages the [OCLC WMS Availability API] (available for libraries using the OCLC WorldShare Management System (WMS)), but the underlying conceptual design behind the application could be adapted for any library management system that has an API or another programmatic way to retrieve availability information about items from metadata available in an OpenURL. For example, Ex Libris' Alma library management system features [Search and Retrieve via URL (SRU) integration] that includes real-time availability information about items. Work is currently underway to adapt OneButton for use with Alma and Primo.

The conceptual design of OneButton

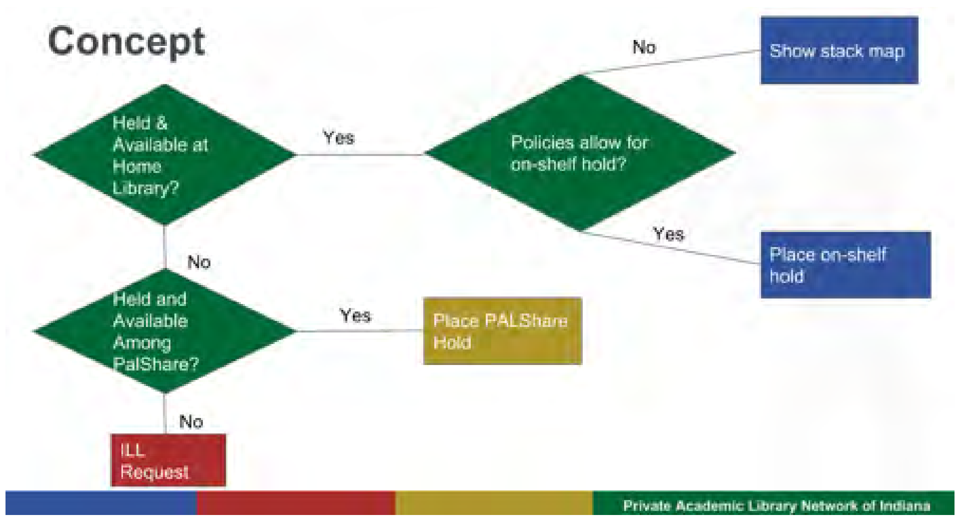

Figure 2. OneButton concept. Given data from an OpenURL string, OneButton takes available metadata about an item, such as the OCLC number, looks up its availability in multiple fulfillment scenarios, and directs the user to the option that will get their material to them the fastest and easiest way possible.

```
$line = array(
"inst"=>"OCPSB",
"loc"=>"WEST-STACKS",
"callnum"=>"PR9199.4.J336 K55 2009",
"avail"=>0,
"barcode"=>"3456789988",
"localloc"=>"WEST");
```

Sample code 2

was partially inspired by [Umlaut](), which is a Ruby on Rails application that is also designed to [route users to optimal fulfillment options]() by supplying "links that take the user in as few clicks as possible to the service listed, without ever listing 'blind links' that you first have to click on to find out whether they are available." It was determined that Umlaut had more functionality that was needed, as it features functionality to improve article-level fulfillment by querying catalog holdings and electronic resource knowledge bases (i.e., SFX). Our use case was limited to evaluating monograph holdings held locally or across the consortium, and it was determined that a custom solution would be simpler to build and maintain for the OneButton use case. Umlaut could have been adapted for our use case, and OneButton and Umlaut have the same goal: to make it easier for users to get to the resources they need.

DEVELOPMENT

OneButton utilizes the OCLC PHP authorization library ([available on GitHub]()) to send authorized queries to the OCLC WorldShare Management System (WMS) Availability API. Libraries that use OCLC's WMS library management system can request API key credentials from the [OCLC Developer Network](). The OCLC PHP authorization library and Guzzle are invoked by OneButton (installed using Composer) and are used to build and send authorized requests to the API.

Because OneButton is implemented in WorldCat Local or WorldCat Discovery as an OpenURL 1.0 resolver, well-formatted OpenURL data is appended to the URL sent to the OneButton script when the OneButton link is clicked from the discovery interface. OneButton stores the complete OpenURL data (for use if the end user is ultimately routed to a traditional ILL form that utilizes OpenURL data, such as an ILLiad request form) and also specifically retrieves the OCLC number for the title from the OpenURL string. The OCLC number is used as the primary identifier of the item and is included in the request sent to the WMS Availability API. An instance of the OneButton application is set up for each institution in the consortium with its own configuration settings, so each institution can determine which forms they want users to see for ILL (e.g., ILLiad or WorldShare ILL forms). Each institution configures their own local instance of OneButton in OCLC's service configuration as an OpenURL resolver baseURL and configures the button to display only for monographs. When a user clicks OneButton from a given institution's discovery system, the user is routed to that institution's specific instance of OneButton, which evaluates holdings and fulfillment options accordingly.

The request URL built for OneButton also includes a parameter (x-return-group-availability) to return holdings data for all members of the consortia (which is organized like a group circulation network).

Where 128807 is the institutionRegistry ID for the WMS Library and 3820802 is the OCLC number of the item pulled from the OpenURL string when OneButton is clicked. Note that this URL will only retrieve results if wrapped in a complete header request including valid API credentials, but it can be tested with the WMS Availability API using OCLC's API Explorer.

Bibliographic data, holdings, and availability information is returned in MARCXML. An example of holdings data returned for an item by the WMS Availability API is shown in **Sample Code 1**.

The OneButton script retrieves each holding entry and builds an array[1] for each holding that includes the institution (stored as a coded value in the nucCode, which is the Location from the MARC Holdings 852 $a), shelving location of the item, the call number, and the number of available items. The number of available items is stored in the value parameter in the availableNow element and represents whether the item is actually on the shelf (not checked out, withdrawn or otherwise unavailable). If an item is available, the value of the availableNow element will be 1; unavailable items have a value of 0. The barcode and the holding library (represented in the localLocation element) is also included in the array. From the example shown above, the array generated by OneButton would look something like **Sample Code 2**.

OneButton then loops through each array and evaluates the number of available items across all libraries. If the item is available at the user's home institution and the home institution allows on-shelf holds (set in OneButton's configuration file),[2] the user is automatically redirected to authenticate

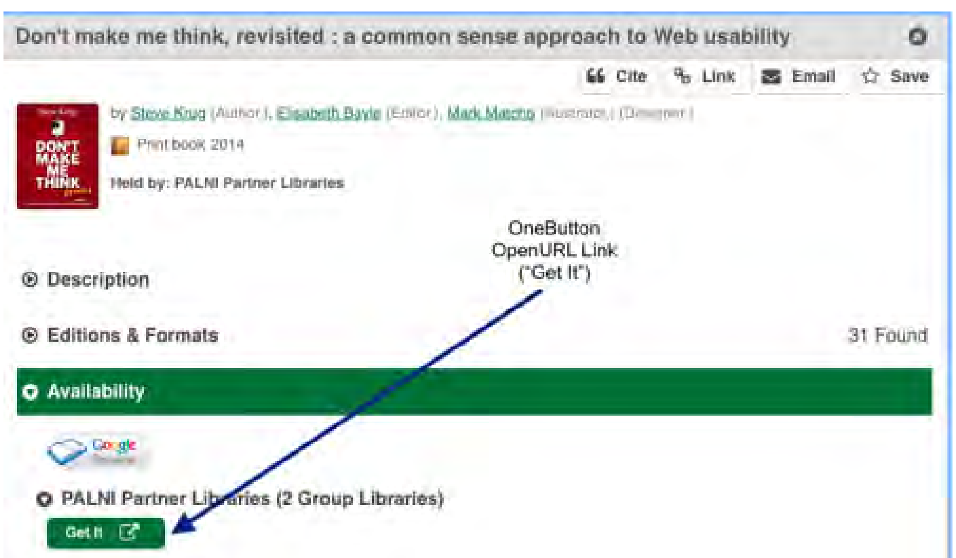

Figure 3. WorldCat Discovery interface showing OneButton link resolver in action as a button labeled "Get It". In this particular case, as the item is held and available through the consortium ("PALNI Partner Libraries"), if the button is clicked, the user will be automatically directed to a consortial place hold screen (provided the consortially-held items are available and lendable).

and place an on-shelf hold for the item. If on-shelf holds are not allowed but the item is available, the user is shown a screen indicating the holdings available for the item and directing the user to find the item on the shelf [**see Figure 4**].[3]

If institutional items are not available but consortial holdings exist, OneButton compares the shelving locations of each held item against a list of non-lendable locations in the consortia.[4] The list of non-lendable locations was obtained by examining lending rules for consortial borrowing in OCLC Service Configuration and recording the locations that cannot be requested by any members of the consortia.

Including this evaluation of shelving locations into OneButton's processing resolved a significant point of frustration for end users when requesting items through PALShare, as the default behavior for placing consortial holds in WorldCat Discovery and Local allowed users to place requests for items that didn't lend consortially due to policies. Those requests would never be filled and would ultimately be canceled, requiring users to place a second request in the ILL system. Instead of directing users to place a consortial request that cannot be filled, with OneButton the user is now automatically directed to an ILL request form for a much better chance of receiving their requested item quickly.

After evaluating each holding array, if there is at least one item held across the consortium that shows as available and is NOT in the list of non-lending locations, the user is directed to a consortial place hold screen (which requires authentication). In the example above, the item has an availability value of 0, indicating the item is not available; if that particular item was the only item held by the consortia, a user attempting to request the item would be automatically redirected to an ILL request form. The ILL request URL would be constructed using the base URL of the ILL form indicated in OneButton configuration[5] and the full OpenURL string generated by the original OneButton request in WorldCat Local or Discovery.

IMPLEMENTATION

The application was available for beta implementation in November 2017, and one PALNI institution (Concordia Theological Seminary in Fort Wayne, Indiana) has been using the code since its beta release. Each time OneButton is clicked, the result of the holdings evaluation (PALShare request, ILL request, or Show Institutional Holdings / Place Hold on Institutional holdings) and the resulting URL to which the user is redirected are recorded in a log file for troubleshooting and usage analysis. Usage of OneButton by Concordia Theological Seminary since November 2017 to August 2018 is shown in **Figure 5**. 1,471 OneButton clicks have been handled by OneButton since November 2017 at Concordia.

As shown in **figure 5**, since the implementation of OneButton, PALShare requests (consortial resource sharing requests) have made up the majority of those 1471 requests, while ILL requests represent approximately 34% of all OneButton clicks. 4.3% of clicks were on items that were held and available by the user's home institution (so the user was shown the availability screen indicating the item's availability and instructions to retrieve the item from the shelf). While that number is low, it is interesting that a not insignificant number of users clicked a button to request an item that displays as held and available, indicating that at least some users were either confused by the availability display in WorldCat Discovery, or that they simply needed more guidance to retrieve the item themselves from the shelf. Only three requests (.2% of all requests) during this timeframe were routed to ILL automatically due to the WMS Availability API being down (not responding).

While we do not yet have sufficient data to determine whether the number of PALShare requests has gone up since the implementation of OneButton, several more PALNI institutions have implemented OneButton since its beta release, and analysis is underway to assess the extent of the impact of OneButton implementation on resource sharing use. It is worth noting that prior to the development of OneButton, Concordia was not participating in the PALShare resource sharing network due to concerns about potential usability issues and button confusion; but since implementing OneButton, PALShare now fulfills more user requests than ILL at Concordia.

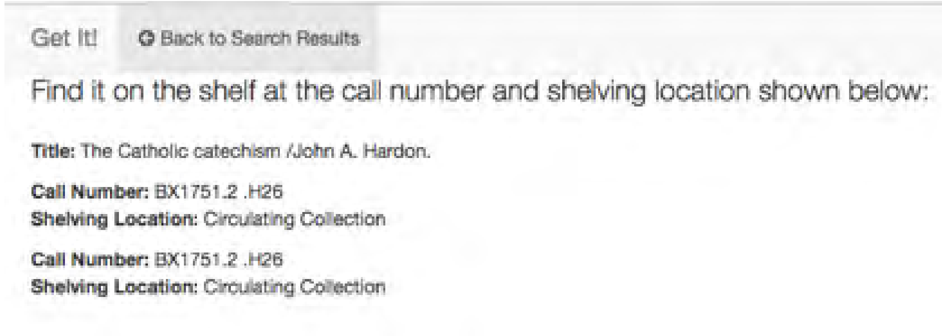

Figure 4. Screen shown to users when they click a request button for an item already held and available by the user's home institution, and on-shelf holds are not configured in OneButton's options.

Figure 5. Data from the first institution to go live with OneButton from November 2017 to August 2018.

» Although OneButton is currently designed to work only with print monographic resource sharing, there is interest in exploring the development of functionality that would direct users to open access options where those options are available. For example, it may be possible to identify whether open access options are available by looking up a requested item using the Open Access Button API.

FUTURE DEVELOPMENT

OneButton is available for any OCLC WorldShare Management System (WMS) and WorldCat Discovery or Local library to implement, and development is currently underway to adapt the application design for use by Alma / Primo libraries. Work is also underway to automate the aggregation and reporting of analytics from OneButton clicks and integrate those statistics into a dashboard that would enable libraries to compare OneButton click activity with resource sharing and ILL statistics.

Development is also in progress to display detailed stack maps to users when they click OneButton for an item that is held and available for their institution. The stack map would display on the availability screen shown in **Figure 4** above and will include detailed directions regarding how to navigate to the item in the library.

Although OneButton is currently designed to work only with print monographic resource sharing, there is interest in exploring the development of functionality that would direct users to open access options where those options are available. For example, it may be possible to identify whether open access options are available by looking up a requested item using the Open Access Button API. This possibility may also lead to further development adapting OneButton to handle article requests, particularly in order to help users who encounter problems accessing the full-text of an article through traditional OpenURL resolving. Other future development possibilities including routing users to purchase request or copyright clearance options if items meet certain criteria. While these potential improvements are in the early stages of research and development, we are ultimately hopeful that OneButton will continue to resolve many problems users encounter when accessing and requesting library materials. ■

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FOOTNOTES:

1 See https://github.com/PALNI/onebutton/blob/master/link.php#L115

2 See https://github.com/PALNI/onebutton/blob/master/config.php.sample#L14

3 The design and display of the page showing institutionally available items is configured in the ShowPage function in OneButton: https://github.com/PALNI/onebutton/blob/master/link.php#L202

4 An example of this configuration file is available at: https://github.com/PALNI/onebutton/blob/master/nonlending.php.sample

5 The ILL form URL is specified in OneButton configuration here: https://github.com/PALNI/onebutton/blob/master/config.php.sample#L18

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