Public Library Succession Planning Checklist

Staff are the most important resource in any public library. Any time a tenured staff member departs, there are many losses, most importantly in their collective knowledge about the library and the communities it serves. Although this loss cannot be perfectly ameliorated, by following this checklist, the library can continue to operate at a high level with limited knowledge loss. Although this checklist could apply to any staff member, this checklist is most applicable for the succession of a director. This checklist is written for the individual that is departing their position but is also helpful for administration or boards in a succession process.

Succession Planning Checklist	
	Read and review your job description and offer suggested edits.
	Create a separate document of your most common "other duties assigned" by analyzing your tasks and how you spend your time.
	Conduct an inventory of library-owned property in your possession so it can be easily returned.
	Think about your institutional knowledge of the library. Is there information that you solely know? Do your best to document these.
	For facilities or maintenance issues, consider creating a "building book" that includes building details, shutoffs, fixes, and contact information for related technicians.
	A large amount of library business is done through e-mail and as such are records that are required to be retained via the prescriptions of the Local Government Records Schedules. Before your departure, be sure to archive or back-up all records that still have retention and make sure that a designated individual can access your account if necessary.
	Create a list of all logins that you use to conduct library business. These include: databases and other services that the library subscribes to, QuickBooks online and other financial services, government sites such as USAC, sam.gov, and the DLG SPGE portal. Because this is sensitive information, be sure to secure it accordingly.

	Go back over a period of at least one quarter. What vendors and service providers send invoices and correspondence directly to you? Is there an individual or shared e-mail inbox that these could go to instead?
	Check library accounts and credit cards. Do any of these have your name on them instead of the library? Begin the process of removing yourself from these accounts.
	Analyze your file structure for both physical and electronic documents. Would their organization make sense to someone else? If necessary, re-label these files and create a document that lays out where they are located.
	Are there any library partners that you are working with on long-term projects? Let them know that you will be moving on and who they can reach out to in the interim.
	Check your calendar and the KDLA public library calendar for upcoming events and deadlines. If possible, delegate some of these tasks. At a minimum, make sure that any successor can be made easily aware of them.