

May 2014 Trustee Tip of the Month Succession Planning

As a great library board, you have already assessed your community for those library services that are needed and wanted, and you have created a vision statement and a strategic plan. You have a technology plan in place that finances updated equipment and staff training needed to meet the advancing technology needs of library users. It's time to think about planning for the future of the library staff needed to carry out this vision, often referred to as succession planning.

All organizations, including libraries, need to consider succession planning as they move toward achieving long-term goals and realizing the vision for the community they serve. As the governing body for the library, boards often think about what they may need when the current director retires or leaves the organization. And, the director, as the executive officer and leader, is a major position to be filled. A good succession plan, however, includes evaluating every position in the library, the competencies needed for each position, and includes looking at each employee to see what areas of development would allow them to move up into an open position.

A dynamic succession plan: allows the library to act quickly to fill key positions that become open, providing a smooth transition; saves time and money involved in recruiting; provides direction on which staff development steps are most beneficial; and, promotes retention of valued employees.

A basic succession planning process includes these steps:

1. Identify key positions in the library.
2. Determine the knowledge, talents, and skills needed to be successful in each key position.
3. Have all levels of leadership assess staff for their potential to step into a key position.
4. Begin to develop employees who show interest and potential with the appropriate training and mentoring they need.
5. Monitor the progress in those employees in their development program.
6. Refresh the succession plan at least annually to identify and determine necessary changes to the plan.

A succession plan can also include identifying people outside of the organization who may have the skills and talent needed for a key position. Defining the abilities needed in the various library positions provides the information needed to make the best selection of successors from both inside and outside of the library.

The library director will take the lead role in the succession planning process. The director will determine the process for assessing the key positions in the library, identifying staff potential, and the methods for staff development and evaluation. The library board will support this process by providing the vision and strategic plan on which the succession plan is based. The board will also participate in evaluating the criteria in the succession plan for the director's position and development.

A dynamic succession plan allows adjustments to be made for rapidly changing horizons and will allow the library to achieve the goals and demonstrate the vision for ongoing excellence in providing library services to the community.

If you need help with succession planning, you can contact your regional librarian for more information. For contact information, see: <http://kdla.ky.gov/librarians/plssd/Documents/regionalconsultants.pdf>.