

## Knowledge Transfer and Succession Planning

Thinking about losing key administrative library employees isn't easy, which is why library boards and administrators so often neglect to plan for the transition when administrators inevitably retire or leave. Succession plans identify key administrators in the library, determine the responsibilities and skills necessary for these positions, and then create a plan for replacing employees in these key positions and for transferring pertinent information about the responsibilities of administrative positions. Having a succession plan can help smooth anticipated or abrupt changes so that library staff, patrons and boards feel as little turbulence as possible.

**Why Succession Planning and Knowledge Transfer Are Important For Public Libraries**

In libraries where there is very little administrative turnover and a history of hiring from within, boards and even directors often dismiss succession planning and knowledge transfer as unnecessary. But without some idea of who takes over during an interim without an administrator, or without a written knowledge transfer plan, libraries can flounder in the event of an unexpected -- or even a planned -- employee absence or departure, leaving employees and board members alike to struggle with painful reorganization without the benefit of the lost institutional knowledge.

**Small Steps**

Succession planning and knowledge transfer can begin with small steps to make transitions easier. A few steps include:

- **Creating Master Files of Essential Information** - for directors, assistant directors and other administrators, this may include passwords to library accounts, keys to and locations of safety deposit boxes, insurance companies and renewal dates, lists of service people and vendors, the latest [KDLA filing calendar](#) along with the information needed to complete each required report, emergency contacts and any other information vital to the day-to-day operation of the library. This information should be kept in a secure location known to the director and other "keyholders" that may include one or more board members.
- **Maintaining Job Descriptions** - administrative job descriptions should be reviewed and updated annually. Annual job description reviews ensure that position descriptions are accurate, and assess the need for change as the library grows and changes.
- **Identifying Possible Successors/Substitutes** – administrators should always be identifying potential successors or substitutes for planned or unexpected vacancies – even maternity leaves can be stressful without a plan for coverage in the interim. A bare bones succession plan will detail key responsibilities for each position, and who will take on these responsibilities in the event that the position is vacant or needs temporary coverage. This plan should also address how to proceed in the event that the position needs to be filled on a permanent basis.
- **Creating and Maintaining a Strategic/Long-Range Plan** – like strategic/long-range plans, succession plans create a road map for the library's future. The two plans should work together. Any anticipated administrative changes, such as a director's retirement, or the addition of administrative positions to staff additional programs or locations, should be taken into account when creating long-range plans, while succession plans directed at the development of staff should project future administrative needs.

You can learn more about succession planning and knowledge transfer here:

[Non-Profit Executive Succession Planning Toolkit](#)

[Knowledge Transfer Template](#)