Succession Planning for Busy Libraries and Boards

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What is succession planning?

According to Social Security Administration:

...process of preparing for loss of critical personnel in an organization.

https://www.ssa.gov/section218training/basic_course_8.htm
What is the goal?

Again, according to Social Security Administration:

...always have employees who are prepared to take the place of those who leave-when they leave.

[https://www.ssa.gov/section218training/basic_course_8.htm](https://www.ssa.gov/section218training/basic_course_8.htm)
Scenario
What employee does next...
What those left behind do...

If there is NO succession plan in place...

• Begs employee to stay
• Serious disruptions in library service and operation
• Really wishes they had bought a lottery ticket!
What those left behind do...

If there IS a succession plan in place

- Wishes employee well
- Confident that library can continue operating without disruptions
- Still wishes they had bought a lottery ticket!
Steps for success planning:

- Start with the basics
- Assessment
- Recruit quality employees
- Identify employees’ developmental needs
- Develop employees’ knowledge, skills, and abilities (KSA)
- Continue to enhance employees’ KSA’s
- Prepare employees for advancement
Assessment

- Position (Title)
- Vacancy Risk
- Impact
- KSA’s for Position
More Information

Social Security Administration
How to Implement Succession Planning

https://www.ssa.gov/section218training/basic_course_8.htm#1
Important Documents

Establishment docs, bylaws, history
Personnel files and policies
Job Descriptions, roles and responsibilities

Finances
Policies, procedures, board minutes
How to carry out important tasks

Calendar
Staff and Board directory
Four to six months ahead of departure date

- Board and director discuss departure
- Board appoints transition team
- Transition team holds organizing meeting
- Board chair meets with staff
- Organization announces departure
- Transition team holds planning session with staff
- Board holds strategic review and leadership planning meeting
Search & Select

- Transition team develops job profile and search plan
- Team launches search/schedules check-ins
- Reviews resumes
- Conducts round 1 interviews
- Holds second meeting with staff
- Semi-finalists visit and meet staff
- Conducts round 2 interviews with executive committee
- Selection made and board ratifies hire
First fiscal year for new hire

• Board plans orientation and launch for new director
• Board announces new director
• New director begins work
• Orientation and post hire process begins
• Director creates 90-day plan and checks in with board after 90 days to review plan
• Six-month evaluation
• Annual performance evaluation of director
Practical Considerations for Board

Outgoing director should leave files the new director will need. Include:
- Personnel files
- User names and passwords for ILS, Texas Public Libraries Annual Report, WorldCat

If no overlap for directors, assign interim

Farewell party for outgoing director and welcome party for incoming director
Practical Considerations for Outgoing Director

Clean out your office!

Don’t forget

✓ Family photos
✓ Coffee mug
✓ Posters
✓ Decorations
✓ Seat Pad
✓ Work sweater
✓ Footstool
And don’t forget
Go buy those lottery tickets!!
Thank You!

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