Invest in Me -- I'm Your Future: Succession Planning for Libraries and Information Centers

Hosted by ALCTS, Association for Library Collections & Technical Services

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Succession planning in libraries

• Modest body of research
• Majority of library and information organizations have written policies or procedures
• Small number of organizations actively pursue succession planning due to funding, time, and interest challenges
ALCTS has taken a leadership role

• ALCTS President’s Program in Midwinter 2016
• ALCTS webinar today
Definition: succession planning

- *Online Dictionary of Library and Information Science* – no entry
- Increases the availability of experienced and capable employees that are prepared to assume these roles as they become available
- Depends on pool of talented individuals (internal and external candidates)
Definition: succession planning

• a means of identifying critical management positions to provide maximum flexibility in lateral management moves and to ensure that as individuals achieve greater seniority, their management skills will broaden and become more generalized in relation to total organizational objectives

• a process for identifying and developing internal people with the potential to fill key business leadership positions in the organization
Poll question #1

• Does my library have a succession plan?
  - Yes
  - No
  - I don’t know
What does this mean?

• Information professions are communities of practice
• Individuals seek higher level jobs through appointment or promotion
  – Prestige
  – Money (salary increase)
  – Authority
  – Influence
• HR professionals are not traditionally embedded in organization
Poll question #2

• Would I benefit personally and professionally if my library implemented a succession plan?
  - Yes, I could advance my career quicker
  - Yes
  - Maybe, I am not sure
  - No
  - I don’t know
Workplace environment

• Trend #1: changing workplace
  – Accelerating rate of retirements
  – Increasing diversity
  – Tightening labor market
    • Shortages of workers
    • Shortage of skills and experience
    • Shortages of educated applicants
  – Increasing demand on professional development
  – Tension of policies and procedures
Workplace environment

• Trend #2: Diverse interests of new librarians and information professionals
  – Expanding opportunities with non-library organizations
  – Work in non-traditional environments
  – Lack loyalty to organization
  – Desire for work / life balance
    • Flexible schedules and locations
    • Technology-enabled arrangements
Workplace environment

- Trend #3: Shift to competency-based education
  - Focus on knowledge, technical skills, and competencies for specific tasks
  - Professional development and continuing education throughout a career
    - Workshops
    - Trainings
    - Webinars
  - ALCTS work to develop core competencies
    - Catalogers and metadata specialists
    - Preservation and archives
Workplace environment

• Trend #4: Emergence of new certifications and credentials
  – MLIS is no longer sufficient
  – Pressure for leaders to learn new skills
    • Professional development
    • Additional certificates and credentials
    • Increased specialization
  – Microcredentials related to industry and competencies
Methods for building competence models

• Outside consultant to interview and record what top performers to
• Hire an outside consultant to teach local staff to perform task listed above
• Adopt a model from another organization, interview top performers and measure consistency
• Assemble group of managers and brainstorm about top performers
Succession planning

• Incorporated into the organization’s long-range planning

• Focus on the current and future needs for the organization to carry out its mission
  – Identify knowledge, technical skills, and competencies that will be essential
  – Function rather than position or individual specific
Reasons for succession planning
Significant for our organization

- Source of replacements
- Recruit and retain talented staff
- Prepare individuals for future challenges
- Provide for smooth knowledge transfer
- Accelerate development of talent
- Reward individuals for learning
- Offer opportunities
- Ensure management continuity
- Control costs from new staff hiring
- Increase ability to attract new talent
How to begin succession planning
Prepare for a paradigm shift

- Longevity ≠ professional advancement
- Lists of individuals eligible for promotion ≠ succession plan
- Reliance on HR ≠ dynamic solution
- Consider lattice career development in concert with traditional, hierarchical models

Career pathways
- Identify potential talent
- Develop talent
- Support emerging leaders
Strategy 1: plan for the future

- Lay the foundation
- Anticipate challenges
- Identify knowledge, experience, technical skills, and competencies
- Conduct job analysis
  - Departments / Divisions
  - Classification strands
- Write new position descriptions
  - Align with initiatives and tasks
  - Consider restructuring
Strategy 2: start the systematic program

• Conduct a risk analysis
• Build a commitment to change
• Formulate mission statement, policies and procedures
• Identify target groups
  – Clarify roles for leadership
  – Strengths and weaknesses
  – Identify developmental activities
Strategy 3: refine the program

• Prepare action plan
• Build skills
  – Employee performance appraisal
  – Potential assessment
  – Individual development planning
• Develop high performance work teams
  – Potential for leadership
  – Strengths and weaknesses
  – Identify developmental activities
Strategy 4: determine work requirements for key positions

- Conduct job and task analysis
  - Review and update position descriptions
  - Identify essential job functions
- Determine critical competencies
  - Competency identification
  - Competency model
- Rapid results assessment
  - Full-circle (360°)
  - Multi-rater
Strategy 5: incorporate annual review

- Assess performance and potential
- Integrate succession planning with performance management, recruitment, selection, development, and rewards
- Identify “high potentials”
- Recognize individual and team contributions
- Invest resources to build technical competencies, leadership potential, and communication skills
Strategy 6: institute development program

• Make a serious commitment to develop the organizational workforce
  – Time (regularly scheduled)
  – Finances (8% budget)

• Identify and recognize opportunities for development
  – Digital badging, MOOCS, industry credentials
  – Apprenticeship models
Strategy 7: determine future work requirements in key positions

- Conduct future-oriented job and task analysis
- Predict future competency models
- Plan for future-oriented rapid results assessments
Poll question #3

- Do I understand the potential benefit of suggesting that my library consider developing and implementing a succession plan?
  - Yes
  - Maybe, I am not sure
  - No
  - I don’t know
Additional reading


Questions?

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