

2013 FLA Conference
 **New Possibilities
and Partnerships**
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Continuing the Possibilities: Succession Planning for Library Leadership

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Risk Self Assessment

QUESTION	YES	NO
1. Our library has a strategic plan in place with goals and objectives for three years.	<input type="checkbox"/>	<input type="checkbox"/>
2. Our strategic plan includes goals for leadership and/or people development.	<input type="checkbox"/>	<input type="checkbox"/>
3. Our library has a written emergency succession plan.	<input type="checkbox"/>	<input type="checkbox"/>
4. Our Library Director has been in her position for less than ten years.	<input type="checkbox"/>	<input type="checkbox"/>
5. Our Library Director has said either formally or informally that she plans to remain with the library for four or more years.	<input type="checkbox"/>	<input type="checkbox"/>
6. Library leadership (staff) performs as a high performing team, such that: <ul style="list-style-type: none"> a) There is a solid culture in place in which leadership team members support one another and can reach decisions as a group efficiently and harmoniously; b) Shares leadership of the library with the Library Director in having significant input into all major library-wide decisions; c) Can lead the library in the absence of the Library Director; and d) Has the authority to make and carry out decisions within their respective areas of responsibility. ⁱ 	<input type="checkbox"/>	<input type="checkbox"/>
7. For those libraries where the director has fundraising responsibility: our Library Director shares responsibility for fundraising and/or the relationships we need for fundraising (including grantors) with other staff and board members.	<input type="checkbox"/>	<input type="checkbox"/>
8. Our Board of Trustees evaluates the Library Director at least annually based on performance and achievement of strategic goals.	<input type="checkbox"/>	<input type="checkbox"/>
9. The members of our Board of Trustees engage in an annual evaluation of the Board's performance.	<input type="checkbox"/>	<input type="checkbox"/>
10. Based on its self-evaluation, our Board of Trustees performs its major governance roles in a satisfactory manner. These include financial and executive support as well as policy development and strategic planning.	<input type="checkbox"/>	<input type="checkbox"/>
11. The Board of Trustees has a plan for developing its own officers so that	<input type="checkbox"/>	<input type="checkbox"/>

QUESTION	YES	NO
they are comfortable and knowledgeable when assuming office.		
12. (To the extent allowed by State law) Our library Board of Trustees has a committee or task force responsible for identifying and supporting new board members who have skills needed to support the library.	<input type="checkbox"/>	<input type="checkbox"/>
13. Financial systems meet governmental and industry standards; financial reports are up-to-date and provide accurate data needed for those board and staff members responsible for maintaining the library's viability.	<input type="checkbox"/>	<input type="checkbox"/>
14. Operational manuals are in place for key systems; they are both useful and accessible.	<input type="checkbox"/>	<input type="checkbox"/>
15. Our senior staff has documented their major responsibilities and each has developed a staff person who can take over if needed.	<input type="checkbox"/>	<input type="checkbox"/>
16. The Board of Trustees has clearly defined term limits.	<input type="checkbox"/>	<input type="checkbox"/>
17. Our Board represents a level of economic, cultural and/or racial diversity approximate to our library's community.	<input type="checkbox"/>	<input type="checkbox"/>

This and several other questions stem from Wolford, Tim. Building Leaderful Organizations: Succession Planning for Non-Profits. [annie e casey foundation ...

NOTES:

What do my answers tell me?

Standards for Judging Potential

High Potential/Promotable

- Exhibits operating, technical, and professional skills that are extremely broad and deep.
- Exhibits managerial skills that are expected at the next highest level.
- Demonstrate leadership skills that are expected at the next highest level.
- Regularly works at building new skills and abilities.
- Aspires to higher-level challenges and opportunities.
- Demonstrates “fire in the belly”.
- Has a business perspective beyond current level at the library.
- Is oriented toward total library results, not just focused on the success of own area.

Growth Potential/Emerging Talent

- Exhibits operating, technical, and professional skills that are high for current position and level at the library.
- Exhibits managerial skills that are high for current level.
- Frequently demonstrates leadership skills that high for current positions.
- Adds new skills when the job calls for it.
- Aspires to greater challenges but primarily at the same level.
- Is motivated to do more than is expected.
- Has a big-picture perspective beyond current position.
- Is focused on the success of own area and the team.

Key Contributor

- On balance, exhibits operating, technical, professional, managerial, and leadership skills that are acceptable for current level.
- Demonstrates little effort to build new skills but keeps current skills sharp.
- Aspires to stay with the library.
- Is motivated to do what is needed in current job.
- Understands the job.
- Is focused primarily on success in the technical/professional aspects of the job.

Note: this employee may have the desire but has not demonstrated the ability to progress to a larger job.

Source: Adapted from Ram Charan, Stephen Drotter, and James Noel, The Leadership Pipeline: How to Build the Leadership Powered Company (San Francisco: John Wiley and Sons, 2001), 172 – 74.

Hi POTENTIALS

List Key Positions that should have employees prepared to transition into:

Candidate/Position #1

Once you decide on your candidates, complete the following form for one of the identified candidates/positions:

Name: _____ **Title:** _____

1. Overall Performance Summary:

(Indicate recent performance including major accomplishments or performance issues.)

2. Key Strengths:

(List 2 - 3. Indicate key technical or professional competencies, skills or knowledge the person has.)

3. Development Needs:

(List 2 or 3. Indicate key experiences, skills or knowledge the person lacks in order to move to the next level.)

4. Development Actions:

On The Job: (What new responsibilities do you plan to assign to help this person develop this year?)

Special Assignment: (What task force, projects or special assignments will be given this year to aid development?)

Training: (What specific training or seminars are recommended this year for his/her development?)

Potential For Promotion:

(Indicate this persons readiness to be promoted to the next organizational level.)

Ready now for the next level. _____ yes _____ no

Ready in the next 24 months. _____ yes _____ no

Ready in 2 to 3 years. _____yes _____no

Recommended Next Position: *(List the next assignment that would most benefit the individual in his/her development.)*

Individual Talent Profile

Name:				
Title:		Performance Rating: (H/M/L)	Current	Prior
Location:		Potential: (H/G/L)		
Hire Date:		Risk: (H/M/L)		
Date in Position:		IDP in Place: Yes/no		
# of Direct Reports:		Talent Code:		

TALENT CODE			
Performance	Potential		
	KC	ET	P
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	KC	KC	ET
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
AR	IR	IR	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

COMPETENCY STRENGTHS/DEVELOPMENT OPPORTUNITIES/ACTIONS

Library Core Competencies:	Rating (1-5)	Development Actions	Functional Competencies:	Rating (1-5)	Development Actions
Customer Service					
Teamwork					

SUCCESSION PLAN/CAREER ASPIRATIONS

Recommended Next Position(s):	Timing

Internal Successors	Library/Function	Timing

Succession Planning Report Summary

Employee	Position /Title	Location	Talent Code	Developmental Needs	Recommended Next Position	Timing	Notes
Jenny Fir	Deputy Director	Central	KC	Current position: managing four generations			
Jane Tree	Director Public Services	Central	P	Executive coaching to improve understanding of impact of behavior on individuals and groups	Deputy Director	12 months	
John Oak	Manager, Central and Outreach	Central	ET	Experience with building projects + facilities management	Director Public Services	9 – 12 months	
Harry Maple	Director, Research and Strategy	Central	KC	Excellent in current role; Does not seek promotion; does not hold an MLS		Not at this time	
Annie Pea	Manager, Community Branches	Central	ET	Leadership development; presentation skills;	Manager, Central and Outreach	18 + months	

