



Leadership Transitions of Key Employees

Kate Hall & Kathy Parker

Who are we?



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Executive Director
Northbrook Public Library



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Consultant & Retired Library Director
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Who are you?



If your most important person left tomorrow, what would stop working by Friday?

Your Tool for Today

Succession Planning Worksheet

What **Key Positions** in your Library do you think you need a Transition Plan for?

- 1)
- 2)
- 3)
- 4)

Take one position and write or a core list of duties

Core Duties

**What
We're
Covering
Today**

OWNER'S MANUAL

**What
We're
Covering
Today**



Know Your Gaps



Train the Next Driver



Write the Manual

Why this matters

When that person leaves, they take the manual with them



Lost
Time



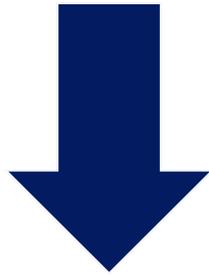
Lost
Trust



Lost
Memory

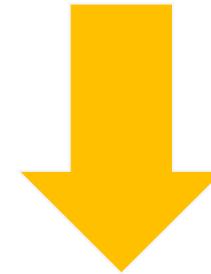
Let's name the two things you might be thinking

"I don't have time for this."



15 minutes once a month

"We're too small for this."



In a 3-person library, one departure is a 33% staff reduction.



Know Your Gaps

Where are you vulnerable?

Who holds
irreplaceable
knowledge?

1

What is
known by
only 1
person?

2

What roles
would be
hardest to
replace?

3

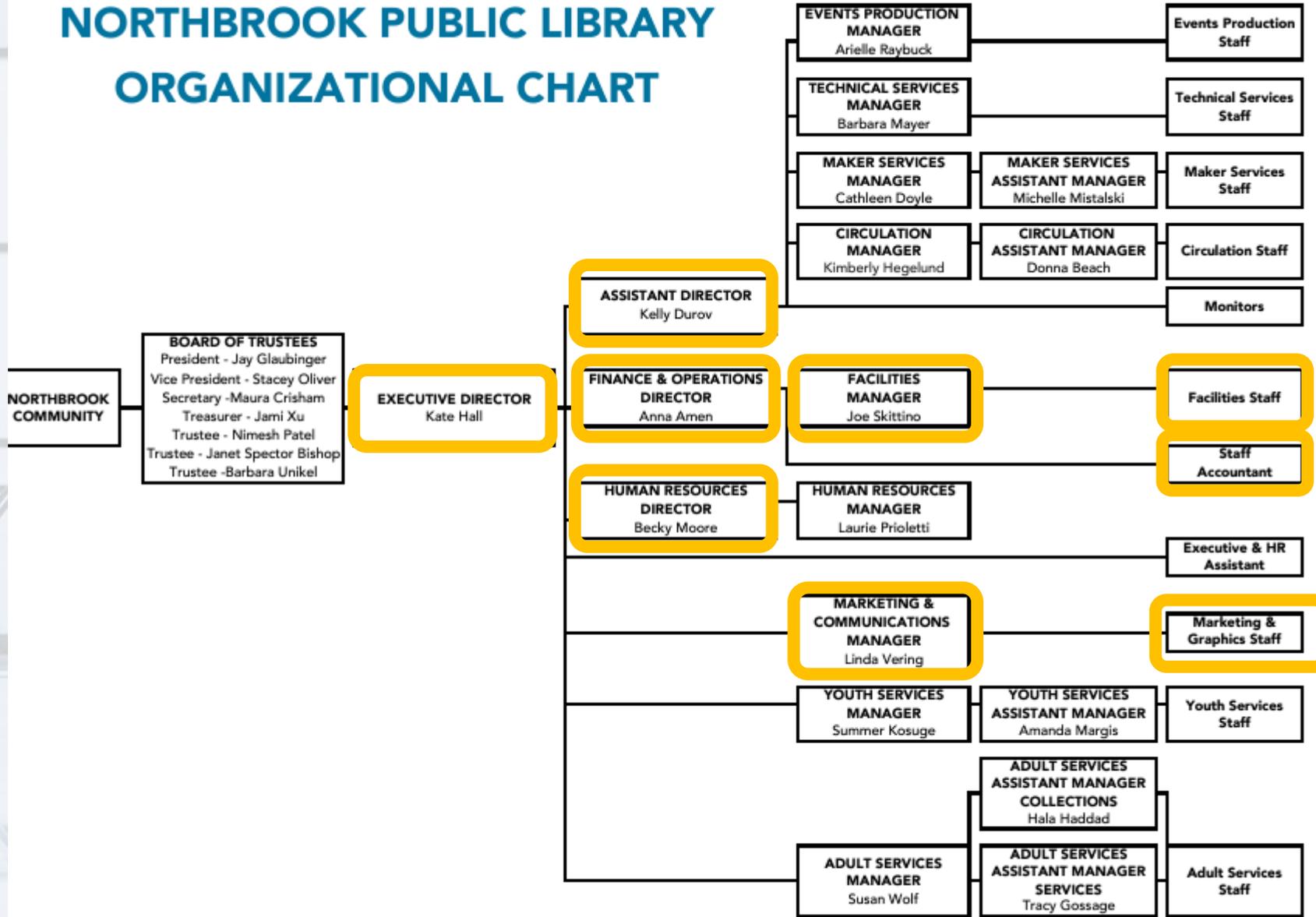
What is in
someone's
head and not
written
down?

4

Pull out your org chart and ask these four questions

Who's on Your List?

NORTHBROOK PUBLIC LIBRARY ORGANIZATIONAL CHART



Chat Reflection

**Whose departure
would leave the biggest
chapter gap in your
organization's manual?**



Train the Next Driver

The Tension Every Manager Faces



If I develop them, will they leave?

Intentional Development



Stretch assignments

Cross-Training

Mentorship

Coaching

What a Good Transition Looks Like

Months 1–3

She ran a staffing analysis.

1

Months 4–12

She developed thoughtfully.

2

Months 13–18

She wrote the manual.

3

Keep it Organized



Not all departures are planned

Leave of Absence

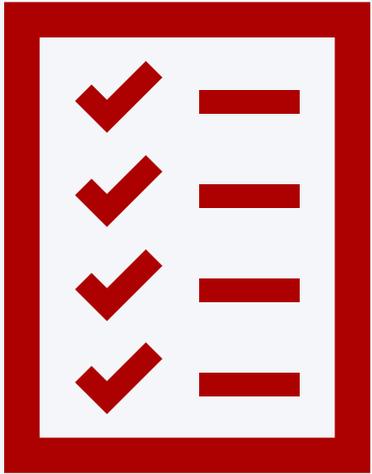
Suspension

**Permanent Position
Change**



When the Car & the Manual are Missing





Write the Manual

What actually needs to be written down

Essential
Functions

Daily Work

Key
Relationships

Access

Chat Reflection

Which role would you document first and what's the first thing you'd put in that chapter?



Communicate, Communicate, Communicate



Before

Who Knows Payroll?

Where are the contracts?

How will we figure it out?

After

It's documented

Files organized by vendor

We're ready!

By the Numbers

40–60%

of small nonprofits have no written succession plan

Nonprofit HR, 2023

**6–9
months**

average time to reach full productivity for a replacement hire

SHRM research

50–200%

of salary is the estimated cost of replacing a key employee

Center for American Progress

Keep in Touch

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