

Succession Management: Strategic & Practical

Worksheets to use when considering this in your
environment

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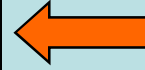
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Driving Forces



Hindering Forces



Why should your library pursue this?
What are the benefits?

What's holding your library back?
What are the drawbacks?



Succession Planning & Management Program

Rothwell, Effective Succession Planning

Commit

- Board and Management

“not for faint-hearted, ill-prepared or uncommitted.”

Rothwell, p.167

- Set strategies
- Establish program understanding, priority & communication plan
- Determine CEO competencies & select
- Recruit & retain Board members

Determine future requirements

- What will the environment around the library look like?
- What will the library be doing in 3 – 5 – 10 years?
- What are its strategies?
- What does the library *look* like? It's programs & services?
- What are *staff* doing?
- What **key roles** will be required?
- What *competencies* will be needed?

Commitment

1. What will it take for our Board & Management to commit to a program? What do they need to know?
2. Who will coordinate or be responsible for the program?

Determine future requirements

3. What are the library's 3 key strategies for the next 3 – 5 years?
4. What types of roles will be critical to bring these strategies to reality?
5. What competencies will these roles require?

Assess current situation

- What's our starting point?
- Inventory today's key roles & competencies
 - Keep the target group manageable
- How do these match up with what we need in the future?

Assess current situation

6. What are our key positions today, and their critical skills?

Key position	Critical skills

7. How well do the current key positions match those we will need in the future?

8. How well do the current competencies match those we will need in the future?

9. How are we developing & retaining strong performers today?

Appraise Performance

- And just how are we doing?
- How well are people meeting their current job requirements?
- Identify strong performersbased on current job



Appraise performance

10. How well are those in key positions performing?

11. How have we identified our strong performers?

Identify potential

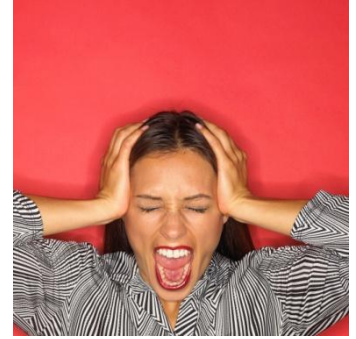
- How do you identify someone's "potential?"
- Establish clear expectations of what you are looking for in future roles
- Review their past performance – what's the pattern?
- Do they seek solutions, or bring problems?
- Are they willing to try new things? Tackle anything?
- What's their follow-thru like?
- Are they a go-to person? Do others like to go to them?

Identify potential

12. How are we identifying what an employee's "potential" is? How will we know if an employee has strong "potential?" What are the specific competencies, knowledge & behaviours we are seeking for each key position?

AHAHAHAH!

Do we really need this?



What problems have occurred in filling key positions in the past 3 – 5 years? (eg. Delays, incumbent doesn't stay more than 6 – 12 mo., etc.)

How long, on average, does it take to fill key positions? Are they ever vacant? If so, for how long?

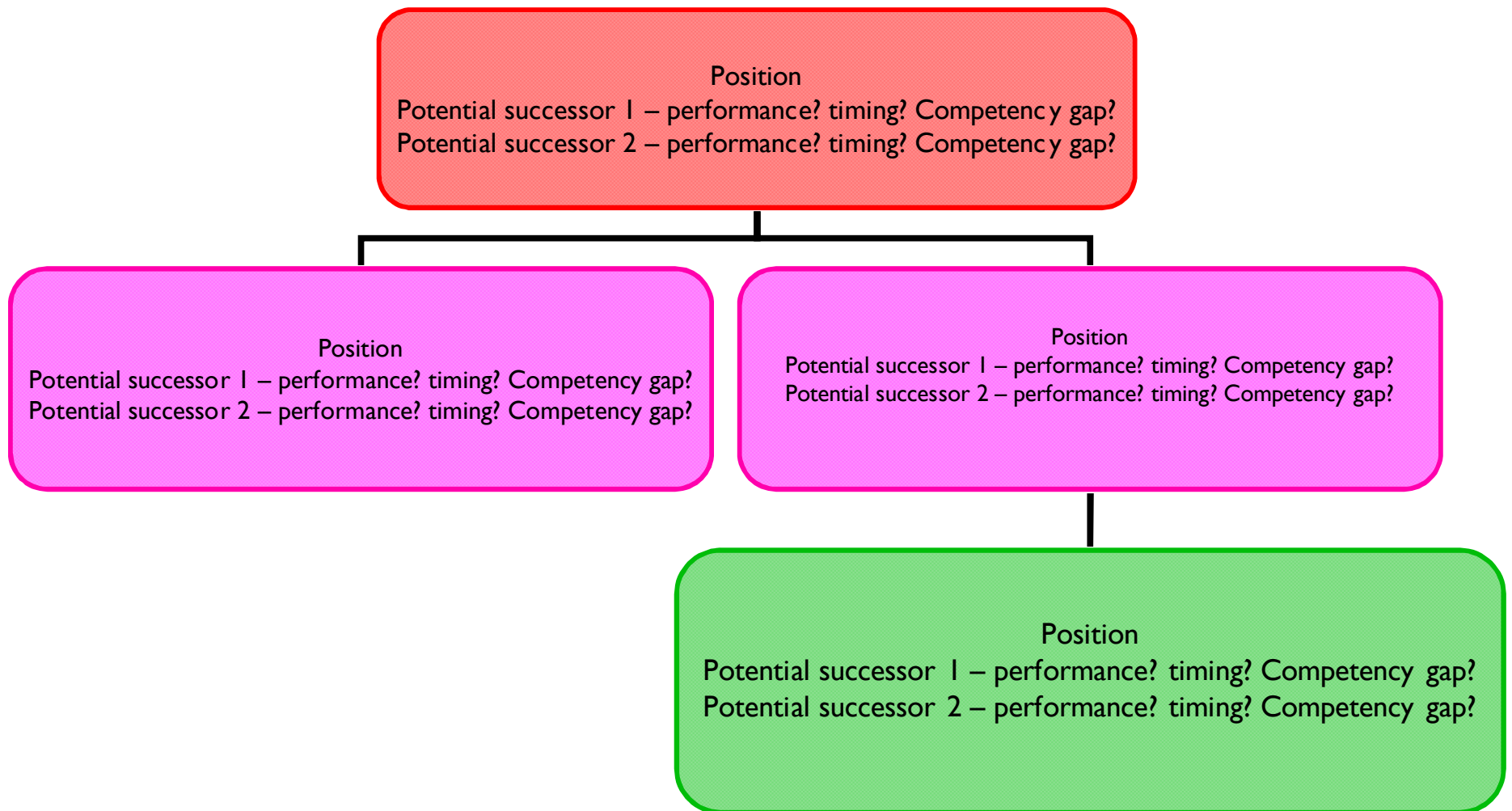
What strategic directions dose the library want to pursue, but can't because the necessary knowledge & competencies aren't in place?

Create & implement development program

13. How is our staff development program aligned with our strategic plan, future key positions and needed competencies?

14. What are ways we can support staff in developing their competencies and knowledge for the future?

Basic succession view



Critical success factors

- Board and management buy-in to systematic approach
- Clear communication plan that fits culture
- Fair, transparent process
- Extends beyond senior management
- Performance, potential & program are evaluated annually
- “Questioning” of ways is encouraged
- Development program
 - Emphasis on mentoring, innovative ways to grow skills, try things & cross-functional or even cross-library moves

