

## Succession Planning Guide: Leaving Notes for Your Successor

Preparing for your departure involves creating detailed notes for your successor to ensure a smooth transition. These notes will serve as a valuable resource for your successor, providing them with the context, insights, and practical information needed to carry on your work effectively.

### 1. Introduction and Overview

- **Welcome Note:** Start with a welcoming message to your successor, offering your support and confidence in their ability to lead the library.
- **Brief Overview:** Provide a brief overview of the library, including its mission, core values, and strategic goals. Highlight any ongoing projects or major initiatives.

### 2. Key Responsibilities and Daily Operations

- **Daily Routine:** Outline your daily and weekly routines, including opening and closing procedures, scheduling, and regular tasks.
- **Critical Deadlines:** List any recurring deadlines, such as budget submissions, grant applications, or board reports.
- **Contact Information:** Include a list of important contacts, such as board members, key community partners, vendors, and service providers.

### 3. Library Collections and Services

- **Collection Overview:** Provide an overview of the library's collections, including any unique or special collections. Highlight areas that require regular attention or upcoming updates.
- **Service Offerings:** Describe the library's core services, such as programming, community outreach, and digital resources. Note any services that are particularly popular or in need of improvement.

### 4. Staff and Volunteer Information

- **Staff Roles and Responsibilities:** Outline the roles and responsibilities of any staff members or volunteers, even if they work on a part-time or temporary basis.
- **Staff Development:** Mention any ongoing training or development needs for staff and volunteers.
- **Communication Practices:** Share your preferred methods for communication and team meetings, and any tips for managing staff or volunteer dynamics.

### 5. Current Projects and Future Plans

- **Ongoing Projects:** Detail any ongoing projects or initiatives, including their current status, key milestones, and next steps.

- **Future Plans:** Share your vision for the library's future, including any long-term goals or strategic initiatives you believe the new director should consider continuing.

## 6. Budget and Financial Management

- **Budget Overview:** Provide a summary of the current budget, including major funding sources, expenses, and any financial challenges.
- **Grant Management:** List any active grants, their requirements, and deadlines for reports or renewals.
- **Financial Contacts:** Include contact information for any financial advisors, auditors, or accounting services used by the library.

## 7. Community and Stakeholder Relationships

- **Key Partnerships:** List key community partners, donors, and other stakeholders who play a significant role in supporting the library.
- **Board Relations:** Offer insights into the dynamics of the library board, including any expectations or preferences they may have.
- **Community Engagement:** Describe the library's role in the community and any outreach strategies or events that have been particularly successful.

## 8. Technology and Systems

- **IT Infrastructure:** Provide an overview of the library's technology systems, including the Integrated Library System (ILS), public computers, and any specialized software.
- **Passwords and Access:** Ensure that all passwords and access codes are documented and stored securely. Include instructions for accessing and managing these systems.
- **Maintenance and Updates:** Note any scheduled maintenance or updates for the library's technology, as well as contacts for IT support.

## 9. Emergency Procedures

- **Emergency Contacts:** Provide a list of emergency contacts, including local authorities, building maintenance, and any other critical resources.
- **Safety Protocols:** Outline the library's safety protocols, including procedures for fire, severe weather, or other emergencies.
- **Crisis Management:** Share any past experiences with crises or emergencies and your approach to handling them.

## 10. Final Thoughts and Encouragement

- **Personal Reflections:** Share any personal reflections or lessons learned during your time as director. Offer advice that you believe will help your successor succeed.

- **Encouragement:** Close with words of encouragement, expressing your confidence in their ability to lead the library and make their mark on the community.

## **11. Contact Information for Follow-up**

- **Offer Support:** Include your contact information and offer to be available for any follow-up questions or guidance after your departure.

### **A succession plan should include:**

- Account information and instructions for securely accessing credentials for all email accounts, databases, and websites affiliated with the library position.
- Budget information and procedures needed to perform library business.
- Calendar of tasks to be completed by the library position. (Include timelines and important deadlines.
- List of current projects and grants.
- Copy of important library documents including policies, procedures, strategic plan, past board minutes and grant information.
- List of important library contacts, including Library Board members, Friends of the Library contact, city contacts, Oklahoma Department of Libraries Contacts ([librarydevelopment@libraries.ok.gov](mailto:librarydevelopment@libraries.ok.gov)) and community contacts.
- Instructions for tasks the position completes on a daily, weekly, monthly, and yearly basis.