**Proactive Planning for Library Staff Transitions**

<https://www.webjunction.org/events/webjunction/proactive-planning-library-staff-transitions.html>

Libraries, like all organizations, need to plan for both anticipated and unexpected staff transitions. This webinar will introduce practical approaches to preserve organizational knowledge, clarify processes for current staff and trustees, and ease the learning curve for new employees. With higher turnover rates and the ever-changing nature of our work in libraries, procedures and policies should be updated and adapted proactively, instead of reactively, to ensure that work is accomplished by well-prepared staff, ready to meet changing community and organizational needs. From payroll to password management, and from job evaluations to janitorial, the various facets and functions of the library can be clarified to better support all staff transitions. Learn how both short- and long-term transitions can be navigated effectively and purposefully with a “transition readiness checklist,” moving both library staff and trustees toward a shared understanding of roles and expectations across the organization.

Presented by: **Bonnie McKewon**, Northwest District Consultant, State Library of Iowa

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| **What are your goals for viewing this webinar?** |
| **Personal Goals** |  |
| **Team Goals** |  |
| **Assessing staff transitions** |
| As you think of your library and potential changes in staffing, consider these questions:* How is your library positioned today to respond to staffing transitions?
* What paperwork and processes do you feel the library has well in hand? What paperwork / processes do you feel needs to be put into place?
* Consider or discuss the ways you learned how to perform your job when you started. How does this inform improvements moving forward?
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| **Prioritizing information for smooth transitions** |
| Using the [*Staffing Transition Readiness Checklist*](/content/dam/WebJunction/Documents/webJunction/2023-04/staffing-transition-checklist.docx) (doc), how would you prioritize the topic areas on the checklist for your library? Use a scale of 1- 6, with 1 being your top priority and 6 being your last priority.\_\_\_\_\_ General Operating\_\_\_\_\_ HR Documentation / Specific HR Policies\_\_\_\_\_ Board Business\_\_\_\_\_ Building Maintenance / Disaster Preparedness Docs\_\_\_\_\_ All Other Policies / Planning Docs / Budget Docs\_\_\_\_\_ Contact Lists |
| **Short-term and long-term transitions** |
| The presenter offered a number of ways to ease staff transitions, whether those transitions are expected or unexpected. Which of these ideas are you most likely to pursue in the short-term? Which in the long-term? (*Indicate short-term with “S”* and *long-term with “L”*).**Reminder:*** Review and discuss the class example of the [*Staffing Transitions Readiness Checklist*](/content/dam/WebJunction/Documents/webJunction/2023-04/staffing-transition-checklist.docx)*.*Does it need to be adapted to be moresuited to your library’s operation? Discuss, customize, and put the checklist into practice at your library.

* Use staff meetings as a way to collaborate on adapting the *Checklist* to suit specific library departments, i.e. create one for the youth services department.
* Create and distribute an annual calendar of events / program participation / report deadlines.
* Other:

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| **Transition planning with library boards** |
| Proactive planning for staff transitions includes important roles for the library board as well. Discuss your board’s “readiness” to help ease the transition for a new library director. What has been the board’s past involvement in this area?What would you like to be their future involvement? |

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| **Action Plan: (include next steps, when, who, etc.)** |

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