

Today's Presenter



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Proactive Planning for Library Staff Transitions

**Bonnie McKewon
State Library of Iowa**

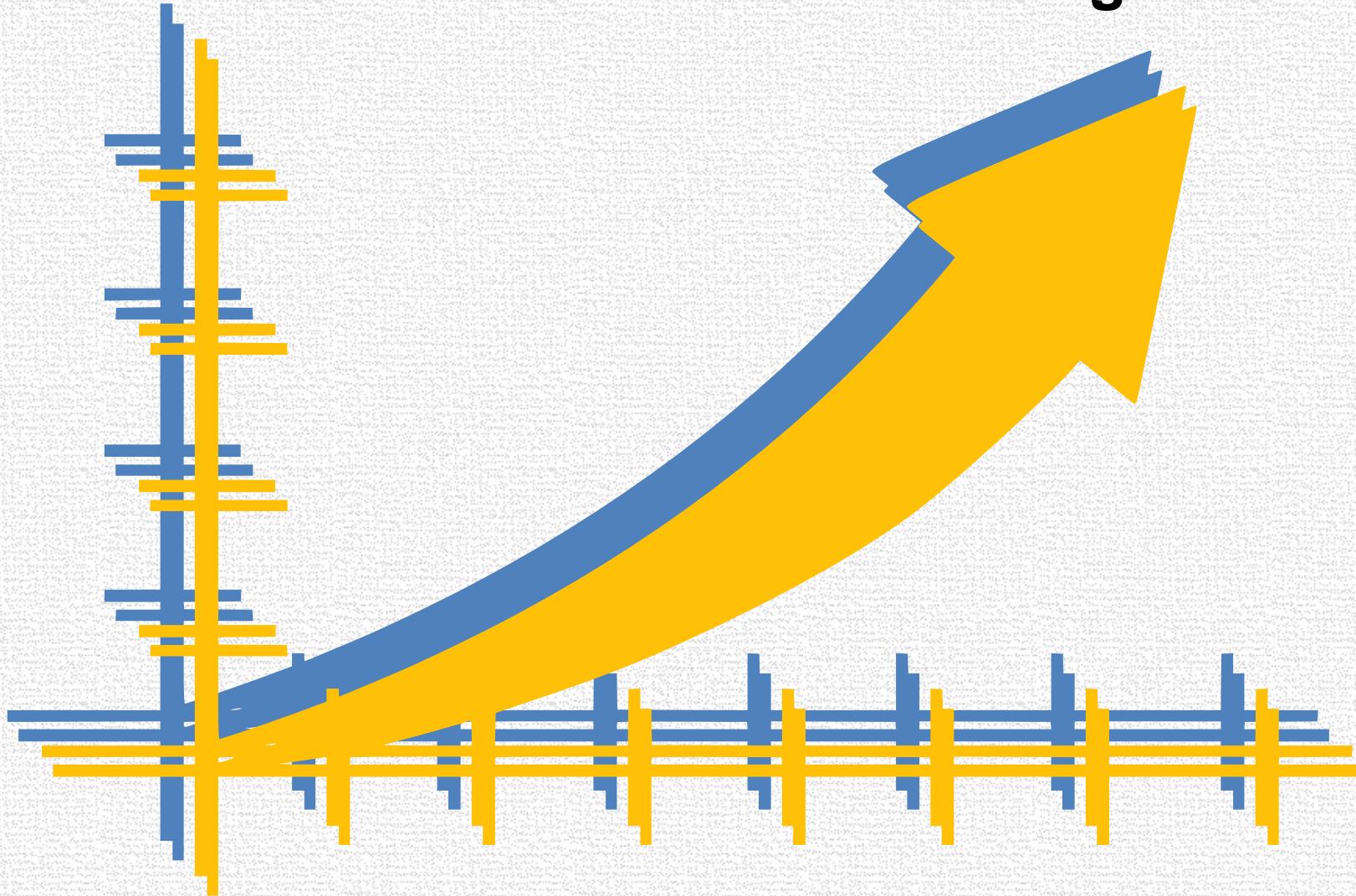


Today ...



- Background & Intentions
- Harken Back to When You Were New
- A Staffing Transition Checklist
- An Annual Cycle of Tasks & Deadlines
- Together With Your Board & Staff

There Are Learning Curves ... And Then There Are Learning Curves



Long-Term Learning

- ❑ Principals of the library profession
- ❑ Your city government
- ❑ Your community organizations

Short-Term Learning

The Day-to-Day

- ❑ Needed documents
- ❑ Annual cycle of programs / tasks / deadlines
- ❑ People available to help

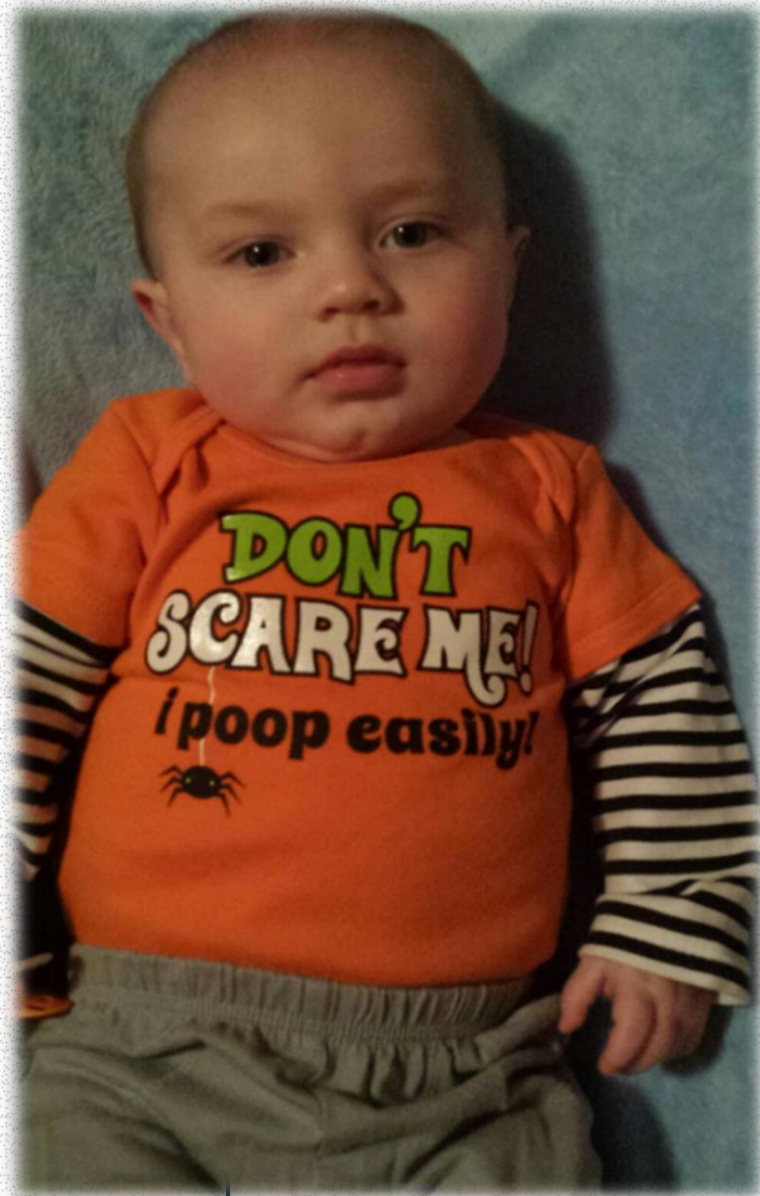


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**When You
Were New ...**

**What Do You
Wish You
Knew?**

In Good Company 😊

From NW Iowa Library Directors

“I wish I knew about the annual expectations, deadlines”

**“I wish I had come into an organized office,
with organization to files and desks and cabinets”**

**“I wish the board had taken a more
active role in helping me”**

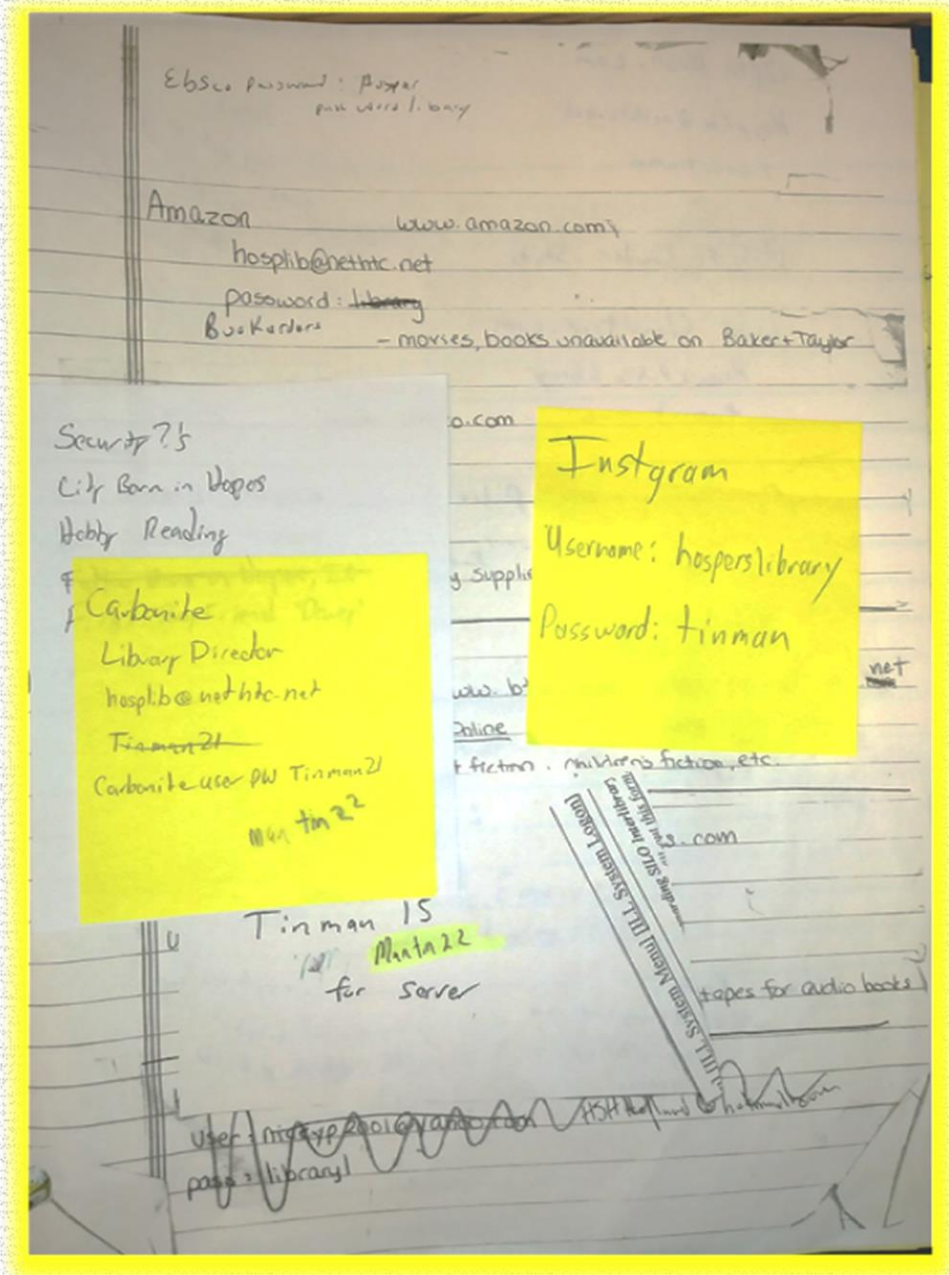
“My overwhelming feeling was ... I felt lonely”

“I wish library colleagues had reached out to me”

**“I could write a novel about what
I wish I knew when I was new!”**

In staffing transitions,
this problem
repeats and repeats...

What is it?



Advantages of Password Managers

- **Allows access to all logins / passwords from one source**
 - Passwords can be smarter, more secure
 - Overall protection process is more secure
 - Saves time = classic time management
 - Access anytime from anywhere
- **Great benefit for staffing transitions**

Retirements, resignations, prolonged absences, unexpected illnesses, etc.

Staffing Transition Readiness Checklist

“accessible” ideally means electronically accessible

	YES	NO
OPERATING		
Daily opening & closing procedures		
Payroll & bill paying instructions		
ILS instructions / procedures		
Purchasing & cataloging instructions / procedures		
Interlibrary loan instructions / procedures > For borrowing / lending via SILO > For borrowing out-of-state > For IASh ares delivery service		
Labeled filing system for documents > Paper based: cabinets, binders, etc > Cloud based: file sharing		
Logins / passwords system—secure and accessible		

HR DOCUMENTATION / POLICES		
Job application form accessible		
Job posting / advertising sources known / evident		
Job descriptions for all positions accessible (within 2 years)		
Performance evaluations for all positions conducted (within 2 years)		
Performance evaluation template accessible		
HR policy manual accessible		
New employee checklist accessible		
BOARD BUSINESS		
Board recruitment practices known and practiced		
Board education system known and practiced		
Board notebooks / documentation accessible (online preferably)		
Board business calendar developed and accessible		

	YES	NO
BUILDING MAINTENANCE		
FFE inventory (Furniture Fixtures Equipment)		
Library contents insurance coverage accessible		
Safety inspection schedule		
POLICIES & PLANNING & BUDGET		
Policies: written (within 2 years) and retrievable		
Policy review process / schedule in place		
Strategic planning document (within 3 years)		
Planning process / approach is evident		
Disaster response plan		
Budget spreadsheet		

TECHNOLOGY		
Computer maintenance schedule		
Computer hardware replacement schedule reviewed / budgeted		
Computer software upgrades reviewed / budgeted		
Internet equipment instructions (routers, servers, etc)		
Wireless access instructions		
Website update instructions		
Website favorites bookmarked or cloud		
PROGRAM PARTICIPATION		
Community partnership projects and contact people		
Summer reading program consortium (manual, login/PW accessible)		
Public library standards		
eBook / audiobook service—library account / PW accessible		
Digital collection subscriptions (solely and/or State Library provided)		
Memberships (Iowa Library Association, PLA, ARSL, etc.)		

	YES	NO
CONTACT LISTS		
Board listing (paper or online)		
Staff listing (paper or online)		
Friends and/or Foundation member listing		
Vendors (books, supplies, janitorial, IT support, etc)		
City & county contacts		
State Library of Iowa staff contacts		

Staffing Transition Readiness Checklist

adapted by Bonnie McKewon: Consultant, State Library of Iowa
 adapted from Succession Planning in the Library. ALA, c2010.



Staff Involvement in Transition Planning

Example: Youth Services Dept

Summer Reading Program

SRP consortium information

Typical schedule for booking summer performers

Throughout-The-Year Partnerships

Maintain list of external partners and contact info



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Disaster Preparedness Toolkit

In the past few years, Iowa libraries have experienced a pandemic, derechos, tornados, local and regional flooding, civic unrest, and more. While having a plan doesn't make these events easy, it will make handling them *easier*. With the right policy and plans in place, it won't matter if a tornado hits during the height of summer reading, or if the pipes burst during a major winter program you've planned, you'll be prepared.

The State Library created this Disaster Preparedness Toolkit in conjunction with the 2022 Learning Circuit. Find all the resources you need here to prepare and respond to natural disasters and beyond.

Disaster Response Plan Template

The State Library developed a Disaster Response Plan template in Word to give libraries a starting point based on best practices in emergency preparedness planning. Very large libraries and very small libraries may need to modify based on their unique needs; one size certainly does not fit all.

The template is based on the publication prepared by the Vermont Historical Records Program. Elements of the plan were developed by Samantha Bouwers (State Library CE Consultant), with information gathered from the following sources:

<https://www.statelibraryofiowa.gov/index.php/libraries/toolkits-guides/disaster-preparedness-toolkit>

From Disaster Response Template State Library of Iowa

Other Services		
Service Type	Company Name/Contact Person	Phone Number (Indicate if 24/7)
Architect		
Carpenter		
Commercial Freezers		
Electrician		
Elevator		
Exterminator		
Fire/Alarm Detection System		
General Contractor		

Service Type	Company Name/Contact Person	Phone Number(s) (Indicate if 24/7)
HVAC System		
IT/Computer Consultant		
Janitorial Service		
Lawn/Grounds		
Legal Advisor		
Locksmith		
Mold Removal		
Online Catalog/Network		
Plumber		
Security		
Snow Removal		
Sprinklers (Fire Suppression)		
Tree Removal		
Website Host		

Annual Tasks & Deadlines

2023

January						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

March						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Accreditation / Standards Report Due

Bridges eBook Service LOA Due

April						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Enrich Iowa LOA Due

August						
S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

September						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Director Performance Evaluation

Determine Next Year's Holiday Closings

July						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Enrich Iowa Reports Due

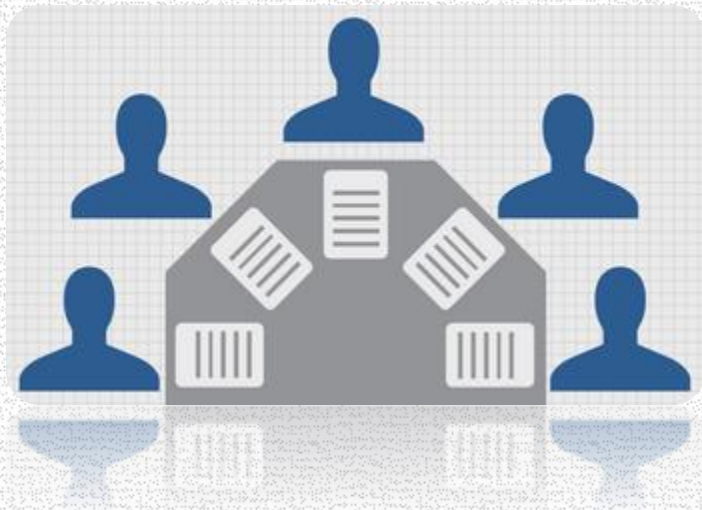
October						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Public Library Annual Survey Due

November						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

December						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Review Strategic Plan



Board Involvement in Transition Planning

HR Documentation Accessible

- Director job description updated
- Sources for advertising the job known
- Hiring process / practice known
- Interview questions developed

Keeper of the Calendar

Introductions All Around the Town

Introductions All-Around

City Hall

Friends Group Foundation

Community Groups

Library Support Groups

(Regional System, State Library, etc.)



Transition Planning Also Applies To Library Boards

- ❑ Take up the board's role in easing the transition and the short-term learning curve for new directors
- ❑ Strengthen the board's recruitment process in finding prospective trustees
- ❑ Send the message early-and-often: ongoing board education is a natural part of trusteeship

Share
**Staffing
Transition
Success**
@ Your Library



My Top 3 Take-Aways 😊

- ❑ Discuss and adapt the “*Staffing Transition Readiness Checklist*” for your library
- ❑ Develop and distribute an annual calendar of events, program participation renewals, report deadlines
- ❑ Ensure that planning for staffing transitions is a collaborative process



Proactive Planning for Library Staff Transitions

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