**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 IAShares 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 |  |  |
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| --- | --- | --- |
|  | 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 |  |  |

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