

# Emergency Succession Planning

*Infopeople* 

Infopeople Webinar Series:  
*The Staffing Challenge*

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*Infopeople*   
An Webinar

**Emergency Succession Planning \**

12:00 noon to 1:00 p.m.

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**Agenda**

- ▶ The what and whys
- ▶ Succession & emergency succession planning
- ▶ Steps
- ▶ Creating a plan



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# Emergency Succession Planning

**Succession Planning**

Integrates: talent management + strategy

- ▶ anticipates change
- ▶ focuses on staff development



It's about the **right people** in the **right place** and at the **right times** to do the **right things**.

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**Poll: Does your library have a succession plan?**



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**Poll: Does your library have an emergency succession plan?**

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# Emergency Succession Planning

Succession planning is a form of risk management; the process should start before you need it.



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## Emergency Succession Plans

“Adventure is just bad planning”

*Roald Amundsen*



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## Succession Planning Process

1. Review strategy
2. Identify critical positions
3. Define competencies
4. Update performance management system
5. Identify vacancies
6. Identify talent
7. Evaluate development needs
8. Create development plans
9. Implement
10. Evaluate

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# Emergency Succession Planning

**Emergency Succession Planning**

1. Assess the risk
2. Identify critical positions
3. Identify priority functions
4. Identify candidates
5. Identify training needs
6. Train and monitor
7. Clarify acting/interim assignments
8. Communicate



Handout #1

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**1. ASSESS & MANAGE THE RISK**

- ▶ Who are your key leadership staff?
- ▶ Are any over 50?
- ▶ Who is high-potential but might leave when the economy changes?
- ▶ Do you know what they are planning?
- ▶ What would the library do if any one of these resigned tomorrow?

Exercise 1

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"The most reliable way to forecast the future is to try to understand the present"

*John Naisbitt*



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# Emergency Succession Planning

## MANAGING THE RISK

Even if you have great answers to the previous questions  
LIFE HAPPENS



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## 2. IDENTIFY CRITICAL FUNCTIONS

- ▶ Critical task
- ▶ Leadership positions
- ▶ Future projects
- ▶ Consequences from vacancy
- ▶ Mission-critical

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## Exercise 2

Select a critical position



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# Emergency Succession Planning

### 3. IDENTIFY PRIORITY FUNCTIONS AND TASKS

- ▶ Common tasks
- ▶ Unique functions

Exercise 3



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### Every vacancy = Opportunity



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### 4. IDENTIFY CANDIDATES



- ▶ Identify key criteria for interim incumbent H/O 2/3
- ▶ Focus on roles and responsibilities - not the individual
- ▶ No more than 3

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# Emergency Succession Planning

**ASSESS POTENTIAL: Key Tasks**

Low 1 2 3 Medium 4 5 6 7 8 9 High

**Success Factors/  
Technical Skills:**

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**ASSESS POTENTIAL: Competencies**

Low 1 2 3 Medium 4 5 6 High 7 8 9

**Success Factors/  
Competencies:**

- ◆ Integrity
- ◆ Customer Service Orientation
- ◆ Communication
- ◆ Individual Leadership & Influencing
- ◆ Teamwork & Collaboration
- ◆ Planning, Organizing and Work Management
- ◆ Visionary Leadership
- ◆ Analysis Problem Assessment
- ◆ Maximizing Performance

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**Exercise 4**

Who could do this job?  
Split?  
Outsourced?

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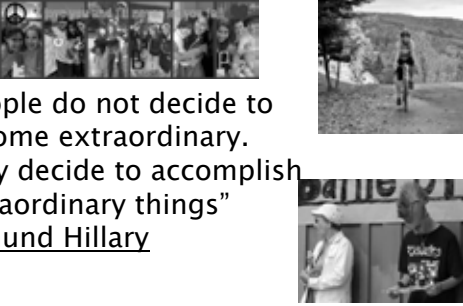
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# Emergency Succession Planning



“People do not decide to become extraordinary. They decide to accomplish extraordinary things”  
Edmund Hillary

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### 5. IDENTIFY TRAINING NEEDS

▶ **Diagnose**  
**Match**  
**Support**



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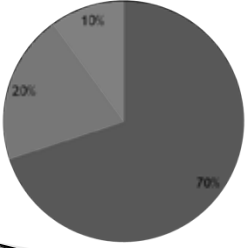
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### 6. TRAIN

Chat & share



- Experiences
- Relationships
- Education

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# Emergency Succession Planning

## TRAIN

- ▶ Begin as soon as plan is adopted
- ▶ Identify those responsible for planning and implementing
- ▶ Monitor & Update



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## Exercise 5 and Chat



What will your candidate need to learn? How?

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**“The time to repair the roof is when the sun is shining”**

*John F. Kennedy*

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# Emergency Succession Planning

## 7. CLARIFY ACTING/INTERIM ASSIGNMENTS

- ▶ Specify *temporary*
- ▶ Identify all reporting relationships
- ▶ Clarify authority
- ▶ Compensation



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## 8. COMMUNICATE

- ▶ Who needs to be informed?
  - How?
  - By whom?
  - When?



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## Example from the Field:CML

- ▶ Board initiated: 10 year/5 year/emergency
  1. Philosophy
  2. Emergency: Identified some who could perform as co-leaders
  3. Some indicated interest in development if in 5 years; if over 10 years, go beyond
  4. Prepare profiles of identified staff members
  5. Development opportunities

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# Emergency Succession Planning

## THE BUS: WHAT IF?

- ▶ Convene exec committee or board
- ▶ Decide/affirm acting
- ▶ Clarify responsibilities & Board roles
- ▶ Comminute short and long term plan
- ▶ Make changes to check signing authority
- ▶ Appoint search/transition committee
- ▶ Sr. staff who can serve as interim
- ▶ Up-to-date JD for interim
- ▶ Key contact list
- ▶ Written procedures for conducting a search

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## Remember to ...

...regularly review and update as changes occur. The emergency succession plan should evolve to suit the current circumstances of the library.



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## Q+A



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# Emergency Succession Planning

## THE SINGER GROUP, INC.

- ❑ **Managing Change:** Creating an Environment Conducive to Change; Organizational Effectiveness; Executive coaching; Management Retreats
- ❑ **Managing the Organization:** Organization Assessment; Organization Design and Development; Strategic Planning; Program Evaluation; HR Department Audits; Consulting Skills for the HR Department; Climate/Attitude Studies
- ❑ **Managing People:** Performance Assessment Programs; Coaching, Training & Developing Managers and Supervisor; Hiring & Selection Guidance; Recruitment & Retention Strategies; Job Analysis & Job Design; Developing Teams
- ❑ **Managing Compensation:** Pay Structure Design & Implementation; Classification Programs; Traditional & Streamlined Job Evaluation; Internal & External Equity; Market Pricing & Custom Surveys

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## SINGER GROUP RESOURCES



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## Resources

Succession Planning in the Library: Developing Leaders, Managing Change by Paula Singer with Gail Griffith

Effective Succession Planning: Ensuring Leadership Continuity And Building Talent From Within by [William J. Rothwell](#)

The Talent Management Handbook: Creating Organizational Excellence by Identifying, Developing, and Promoting Your Best People by [Lance A. Berger](#)

The Leadership Pipeline: How to Build the Leadership Powered Company by [Ram Charan](#), [Stephen Drotter](#), & [James Noel](#)

Career Planning and Succession Management: Developing Your Organization's Talent--for Today and Tomorrow by [William J. Rothwell](#), [Robert D. Jackson](#), [Shaun C. Knight](#), [John E. Lindholm](#)

Talent Management Systems: Best Practices in Technology Solutions for Recruitment, Retention and Workforce Planning by [Allan Schwager](#)

An Operational Process for Workforce Planning by [Robert M. Emmerichs](#), [Cheryl Y. Marcum](#), [Albert A. Robbert](#) [Robert M. Emmerichs](#), [RAND](#)

*Demography is DeStiny* Dr. Ken Dychtwald and The Concoors

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# Emergency Succession Planning

Thank You!!

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