



Friends of Libraries Section

The mission of the Friends of Libraries Section is to promote and inspire local Friends groups in libraries of all types for the betterment of New York State's library community.

Planning for Smooth Transitions: Tips for Friends Preparing for Leadership Succession

Leadership transition is a crucial moment in an organization's life: the group may see the arrival of new officers as an opportunity for change. But there is also a sense of vulnerability, especially if multiple volunteers determine to end their service at the same time. How can you prepare the Friends group for a smooth transition? Put succession on the next meeting agenda. The planning process can seem less daunting if the organization begins a series of small steps that will help the new leaders. Showing potential volunteer leaders that the group is on solid ground may attract candidates that might otherwise be "on the fence" about accepting the leadership mantle.

Evaluate the age of your board. Many Friends officers retired from their careers and then stepped into the community arena to lead as volunteers. Where do you look for a new president or a team of officers? Think creatively! As many Baby Boomers head into retirement, look to this pool of potential volunteers for their myriad of talents, but also consider community leaders from other nonprofits contemplating ways to serve in new arenas.

Here are a few ideas to create a transition plan as you reach out to your own members to consider stepping up as leaders. Being prepared reflects your commitment to the organization for the long term. Help your group be fully prepared for the inevitable.

Ideas for all Officers of the Friends and/or the Friends Steering Committee:

Assess which individuals will make the organization most vulnerable if they leave and develop contingency plans specifically around them.

Create and adopt an "Emergency Leadership Transition Plan" to outline the delegation of duties and authority whenever there is an unexpected interruption of key positions.

Always have an idea of a potential candidate who can step up to the board in case of emergency. Cross-train volunteers to minimize disruption. Assign assistants to the treasurer, the book sale chair, and other key positions.

Review the officer's job description. Create a tally of every single task the last past leader was doing. Often a leader will take on more responsibility than the person should handle. Another superhero is not going to appear. Divert some of this administrative work to your board or volunteers.

Identify continuing education and leadership development opportunities for volunteers that can expand their skills, helping the group increase their pool of future leaders.

Compile a list of all personal and professional connections that the board has and what information and projects they are experts in. This inventory will help the new leader know who to contact when executing projects.

Assign each task in your succession plan an estimated amount of time needed. Then you will know when to begin and how far you are in the plan.

Network with the leaders of other Friends groups and ask if they have any tips or strategies that have worked for their organization.

Create a handbook of all your group's knowledge that is easily accessible to anyone, keeping information from getting lost as volunteers transition from one role to the next.

Store all documents in a shareable folder, such as Google Drive, giving key volunteers easy access to the organization's knowledge base.

Ensure that the organization has a very clear vision, making sure that projects and initiatives that support the library do not drastically fluctuate from one leader to the next.

Be transparent about your process. Secrets can create politics within your board and members.

Evaluate your organization's values, purpose, and mission statement. In the case of a dispute, you can always refer back to your organization's purpose to guide the correct decision.

Ideas for the current officer preparing to exit:

Rewrite your own job description based on your experience of the work involved. Request the Board to review the revised job description, ensuring it is in place for the new officer.

Have a new leader start early, providing an overlap between roles. Use the job description as an orientation checklist. At least a month prior to the transition, invite your successor to a "training day" with you.

Consider diagramming an organization chart to give the new leader a reference guide to who does what. (You may be surprised by the complexity of the group's projects.)

Evaluate major projects and fund-raising initiatives regularly, giving feedback and appraisals to current team members to determine who among them might be a good leadership fit.

Encourage cross-training to help cultivate leaders from within your current team of officers.

Ideas that individual officers could implement:

Post on social media that the organization is searching for new volunteer candidates. Include a job description. Utilize the reach of your network by asking members to share the post.

Develop a culture of shared information among the board, making certain that information does not depart with the last leader.

Be a coach! Facilitate a mentorship program between the Friends leadership, key volunteers, and members. This initiative can help nurture rank-and-file members into board members and board members into leaders.

Create a document of FAQs, Frequently Asked Questions, about your position that can be shared with your successor.

Adapted by Lisa C. Wemett, Friends of Libraries Section, New York Library Association,
based on ideas posted by Terry Ibele [Learning Apricot]:

<https://www.wildapricot.com/blogs/newsblog/2016/12/05/succession-planning>

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