

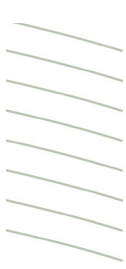
Succession Planning: Preparing for the Transitions in Our Professional Life

By Susan Ebertz

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In June 2024, I presented a session at the Atla Annual Conference in Long Beach, California, USA. The title of the session was the same as this one. The Atla Annual Conference Summary of Proceedings was published March 10, 2025, with my presentation included in it. You may want to look at it in conjunction with this article. In thinking about the topic since that session, I have changed some of the presentation for the ANZTLA conference 2024.

I became interested in the topic of succession planning when I began thinking about when to retire. I also thought about it after I retired as I evaluated what I had and hadn't done. Some things should have been on my to-do list in preparation for retirement. Some things that I did, ended up as good succession planning tasks. We will look at some of my reflections and see what are some best practices that others might find helpful as they transition to another job or to retirement.



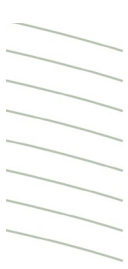
I think it is important to know my context so you can understand my perspective a bit better. I was born and grew up in Hawaii and now live in Iowa which is in the middle of the United States. I previously worked at a Lutheran seminary for 26 years. When I retired the school had about 150 students with about two-thirds online. I had one part-time staff person and some students. The part-time position was entry level.

My main goal in this session is to encourage you to consider succession planning beginning with the first day in your new position and how succession planning affects what you do in your work.

I believe in trying new things and figuring out how it can be useful. I was curious about using generative AI to see if it would be helpful in my thinking on the topic and to see if I was missing anything. I asked Perplexity to give me an outline for a presentation on succession planning for seminary libraries. It gave me an interesting outline which covered many of the important topics that should be covered. I am using some of the suggested topics from Perplexity. You may want to try Perplexity out, if you haven't and see what kind of outline you receive and what resources are available on the topic. Of course, you shouldn't have AI completely write your work.

Some of you may be familiar with the idea of succession planning because of your involvement with the British Commonwealth or you may follow the British royal family gossip. As I have heard it said, the children of royalty are sometimes referred to as the "heir and the spare." That type of succession planning involves growing your own successor.

Succession planning is used by many businesses and institutions to ensure leadership continuity so that the organization can continue to thrive. The organization wants to make sure that there is a good transition when the top executive leaves. Sometimes the business or institution will grow their own by seeking someone within the organization with the gifts and skills necessary to be a good successor. The person in the organization would understand the culture of the organization and make the transition relatively easy. The alternative would be that an organization would search for someone outside the organization with the necessary background and skills. This may bring



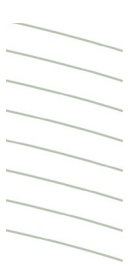
new ideas and ways of doing things but may make the transition a bit more difficult. The outsider would need to learn the new culture quickly.

Recently I was talking with a dean of a seminary. The admissions director had just resigned, and the school was working on what to do. With only a few months before the start of the new school year, the timing was not ideal. The former admissions director was not planning on leaving, but the opportunity happened quickly. There was no time for any transition plans to be put in place. I mentioned to the dean that I am a firm believer in the importance of succession planning on day one of a new position. I knew from experience that the average length of tenure of an admissions director is three years. It would have been helpful for them to have the admissions director begin working on a succession plan on the first day of the job.

One does not always think of succession planning in seminaries and particularly seminary libraries. Because of this, it is often not thought of as a way to ensure a good transition when someone leaves. This is especially true when someone is planning on leaving and has not prepared the organization for their leaving. Of course, someone may not want anyone to know that they are leaving as this in itself may cause interesting dynamics.

What is succession planning? It is planning for who the next successor is in various positions within an organization. This may be a permanent change, or it could be a matter of finding someone to fulfil some of the tasks and responsibilities while an employee is out of the office temporarily. Temporary and permanent replacement would mean different types of emphases and plans.

I was gifted with a six-month sabbatical every three and a half years. With a small staff, this meant that I had to really think about who would be doing the various tasks that I did. I would also need to make sure that the sabbatical fell within a good window of how long the paraprofessional was at the job. If my sabbatical started during the paraprofessional's first year, then I would not give that

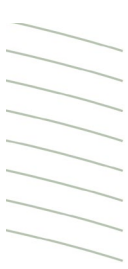


person as many responsibilities or I would ask for a part-time sabbatical replacement to do some of the work. I would usually keep some tasks for me to do.

Succession planning as I see it is basically leadership development for all the staff. The ideal way of implementing leadership development is to create a strategic plan for the library, if there is not one already. The first step would be to understand the mission or purpose of the library. Why is the library a part of the institution? What is its function? How will it fulfil that? Some libraries may have an unspoken mission which is basically understood by all the staff. As the director of a small library, I did not have the luxury of time to create a mission statement. I knew that we were to serve the students and faculty of our institution. Wordsmithing that idea into something catchy was not on my to-do list.

The next step in creating a strategic plan would involve assessing the needs of the library. What does the library need to do in order to fulfil the mission of the library? I tend to evaluate on the fly whenever we do something. Is it really fulfilling what we want, or do we need to change or tweak things?

Next, there should be assessment of the skills and gifts of the library staff. For small libraries that may be more integrated into the organizational structure of the school, this may mean seeing who is doing what in support of the library. The tasks and responsibilities of the library should be delineated. This may mean evaluating some of those tasks and responsibilities to see if they are really necessary. Priorities need to be set with the mission of the library and of the school in mind. Things that you could or should be doing that you are not currently doing should also be listed in the priority. If we added a task or responsibility, then we got rid of something else. We didn't have time to do it all.

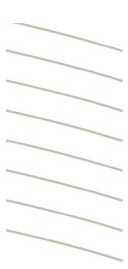


Of course, the institution's strategic plan should be consulted to see what the role of the library is. Once the strategic plan is completed, a leadership development plan can be created so that all the necessary pieces will be a part of that plan.

I don't know about you, but I have struggled with creating a strategic plan. Being the director of a small library with a small staff at a small institution means that there is not as much time to focus on planning. I understood what the institution's strategic plan was. I then thought about how the library fit into making those goals happen. For many libraries, the main goal of the library is to provide the resources that the students and faculty need. Other goals then followed under this. It was important for me that students and faculty used the physical library as well. The physical library was a symbol of what the library is and when faculty and staff did not see students in the library or if they didn't use the library, they wondered about the need for the physical library. The faculty and staff may assume that everything could be found in our ebooks and eresources or on the internet.

As I mentioned, succession planning is basically leadership development. It is helping all staff to learn leadership skills. It is not only teaching leadership skills for the particular position or even to take over another position in the library. Learning leadership skills is important for any position the staff person may have. As I mentioned, the paraprofessional position was entry level, and the person usually lasted only three years. I saw leadership development as helping that person learn and grow for the next position they may have. This also includes students. Some of the students who worked in the library discovered after they graduated that they preferred working in the library more than church ministry.

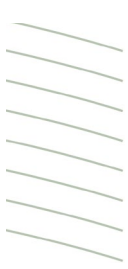
Knowing a person's gifts and abilities when they started working was important. It provided a base line in knowing what needed to be learned and what can be reinforced. When hiring student staff, I had them fill out a form which told me their work experiences that is relevant to a library, their abilities such as detail-oriented, and what they enjoyed doing. In knowing what the gifts, abilities, and interests of the staff are and then matching it to the tasks needed in the library, I discovered



that the staff enjoyed their work more and did a better job. They could also provide leadership in that area by teaching other staff. It also helped them learn new skills that would not only be helpful in their job but also in any future positions they may have. Professional development opportunities provide other sources for learning leadership skills for the library staff as well as skills needed for the current and future positions. It is important to foster a culture of continuous learning and development.

Succession planning involves knowledge transfer. Often the Human Resources person at an institution will help with training staff on institutional policies and procedures. The library is responsible for stewarding its own policies and procedures. Succession planning involves having the policies and procedures in a transferable form and the method in which the information is taught. Documenting policies and procedures can be a time-consuming task. I slowly collected procedures and ideas which were implemented as needed. The paraprofessional usually lasted for only three years before they found another job. One of the paraprofessional job responsibilities is to document and edit the procedures for the tasks they did. This created a wealth of documents for knowledge transfer when they left. Often, I was not able to hire anyone until after the staff member left. This meant that the procedures and documentation we collected were important in the training of the new person.

The student staff were also cross trained in all the tasks and responsibilities. We considered ourselves a team and were able to switch tasks as needed depending on who was working. Cross training meant that someone could step in to do the tasks as needed. We used a project management tool to organize our work and to assign tasks. The paraprofessional as well as the students used the software to collaborate on library projects or to assign unfinished projects to the next person working. Succession planning in this instance meant having a good way for knowledge transfer between the former and the new staff person.



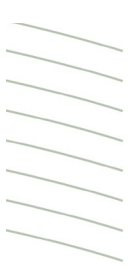
Mentoring is an important tool in leadership development and knowledge transfer. Mentoring can take many approaches. The mentoring relationship can be a formal one within a formal structure. The items covered can vary according to the people involved and the purpose of the mentoring. When I first started out as a library director, I often based my decisions on what the library director at a nearby library did. I sometimes asked her why she did what she did so that I could understand the reasoning and principles behind her decision. I saw her as an excellent role model. When I had questions about areas that I had not seen her do, I would ask her for advice. It was not a formal mentoring relationship, but I did see her as my mentor.

In succession planning, the person mentored is usually someone who will take over the position of the mentor. This would be an internal succession with the successor learning leadership skills and knowledge particular to the position.

For smaller institutions and for those who have added responsibilities, creating a plan that has all the components for succession planning can be rather daunting. Many libraries in the US are being downsized including seminary and university libraries. Many libraries are asked to do more with less. They are expected to provide electronic resources as well as physical resources, in a sense two libraries rather than one, all with a smaller budget and fewer staff. Those from a Christian background may recognize the phrase of building bricks with no straw. The brick makers need to also add gathering straw to the other duties.

Do you have time to create a strategic plan and a succession plan with the type of analysis that is needed for that? Perhaps the more efficient way of dealing with succession planning and leadership development is thinking about those with whom you work and ways in which you can help them grow in their leadership skills.

Mentoring without creating a program may be an easy and intuitive way in which we can help those around us grow in their leadership skills. Some of our students later became faculty members. Some worked in the library or used the library extensively. They were in the library, and it was easy



to create a relationship with them. Later when they came back as faculty members, they became advocates for the library. They will also understand how the library functions. Mentoring them while students is one way to help them learn about the library.

Mentoring the paraprofessional staff person not only helps while they are working in the library, but when they leave in about three years, they would have developed great skills for the next library or position. Hannah was the last paraprofessional to work with me before I retired. She was bright and very good at her job. Hannah was definitely overqualified for her job. I would assign her tasks that I knew she would find interesting. I asked her for advice. We often talked about how to improve things. I encouraged her to find another job. In fact, I would send her information about open positions which I thought she would like. She did get a better job which integrated her undergraduate degree and what she learned at our library. Later when I met her supervisor of the new job, the supervisor thanked me for teaching Hannah so well. Hannah visits every couple of months or so. In our conversations, she often reminds me of something I taught her. It goes full circle when the mentee becomes the mentor or perhaps when there is mutuality in creating growth in each other.

Succession planning is leadership development. It's helping others to grow into the leaders who can further the library profession and the information profession. It can also help organizations to ensure good leadership for the future.