

# CLEVELAND PUBLIC LIBRARY SUCCESSION PLANNING

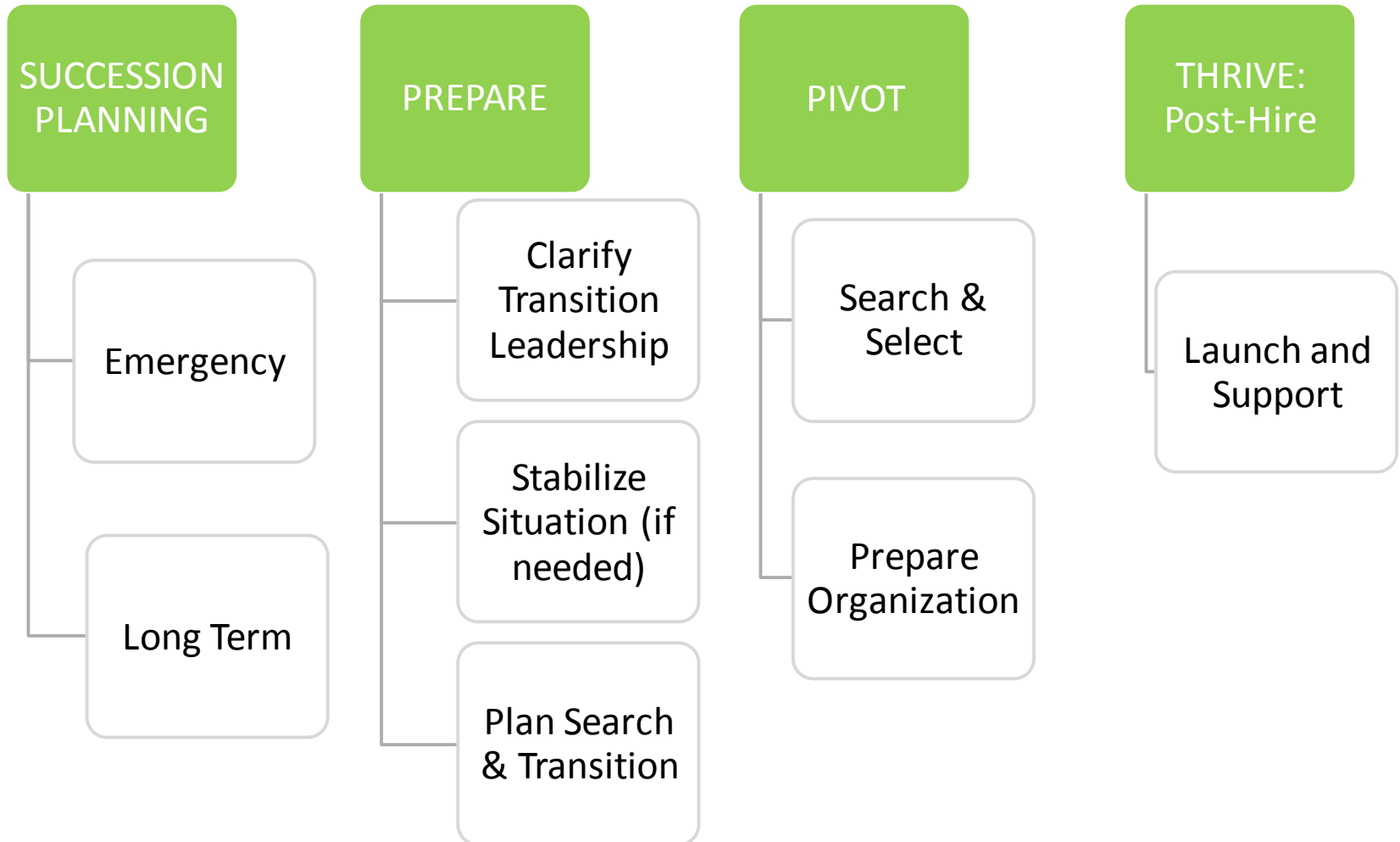
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# Value of Succession Planning

- Ensure the long term sustainability of the organization - mission and impact to the community.
- Identify future leaders.
- Identify competencies necessary to meet organization goals.
- Understand your talent pool.
- Identify potential vulnerabilities and risks within the organization.
- Identify skill gaps and manage development.
- Motivate individuals by stretching their abilities.
- Effectively manage changes of key personnel.

# Executive Transition Management

TransitionsGuides 2004-2006



# Succession Planning Process

## Basic Steps



**Identify the critical roles and competencies required to meet future needs**



**Assess employees and identify potential successors for critical roles**

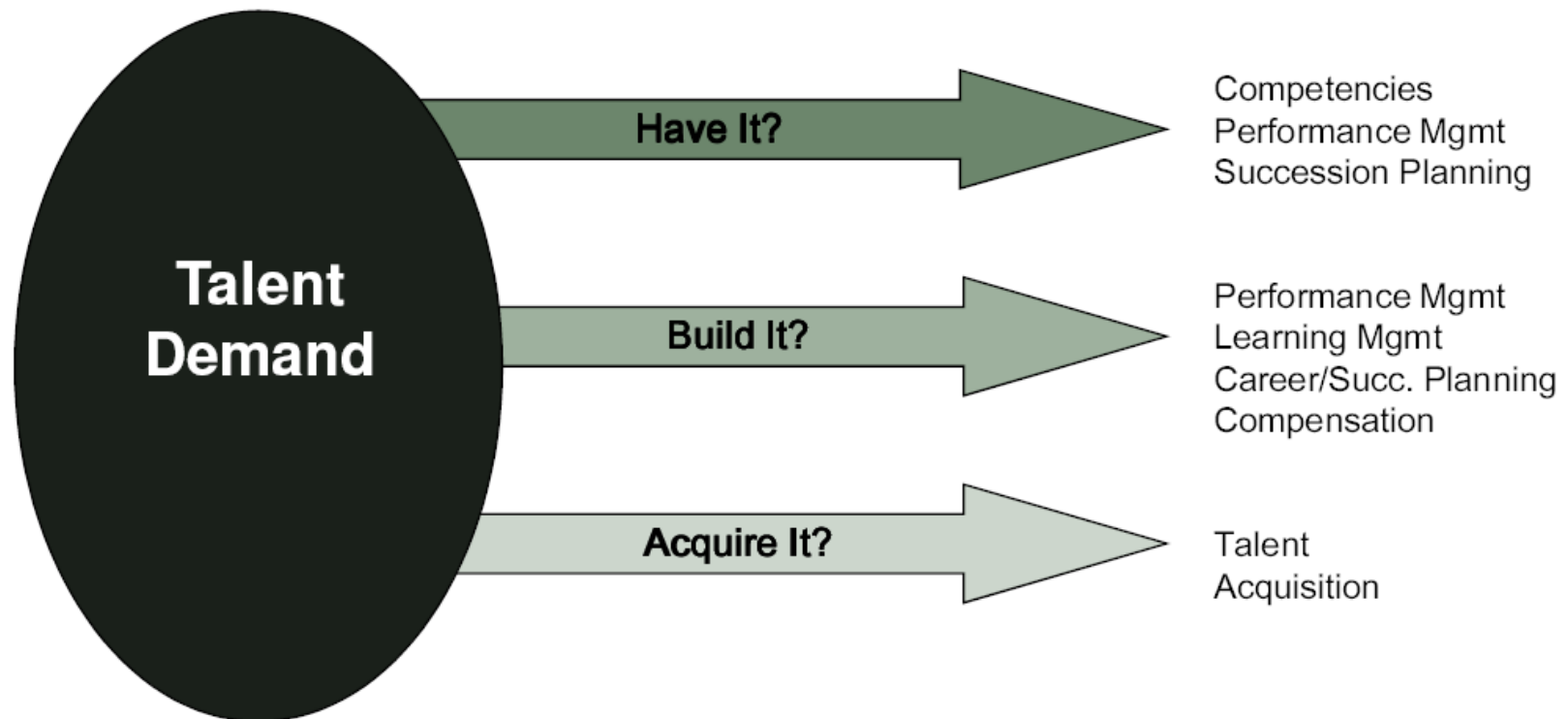


**Determine if skill development is required to prepare employee for future role**

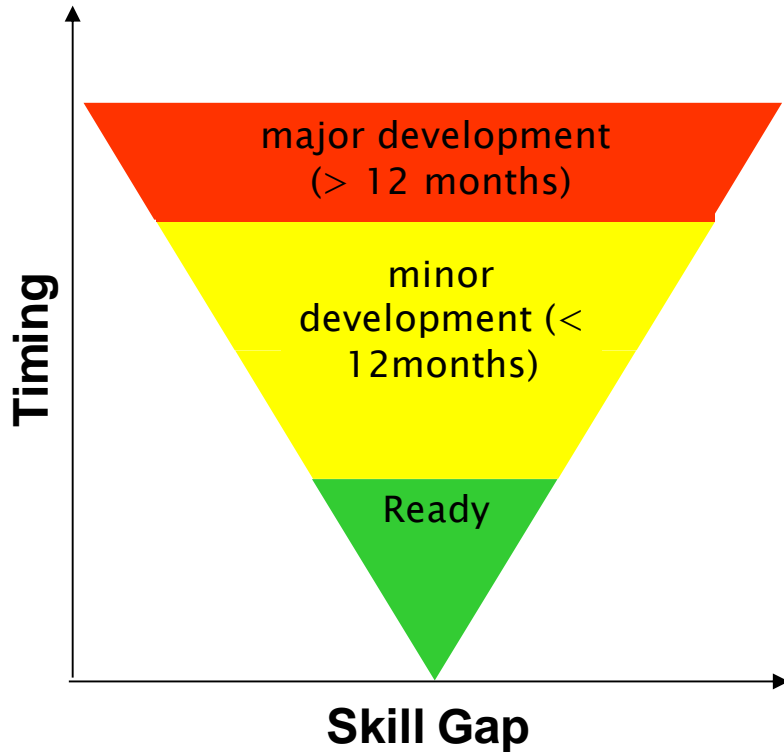


**Plan recruitment and manage placement of identified successors**

# Model for Managing Talent



# Readiness Assessment

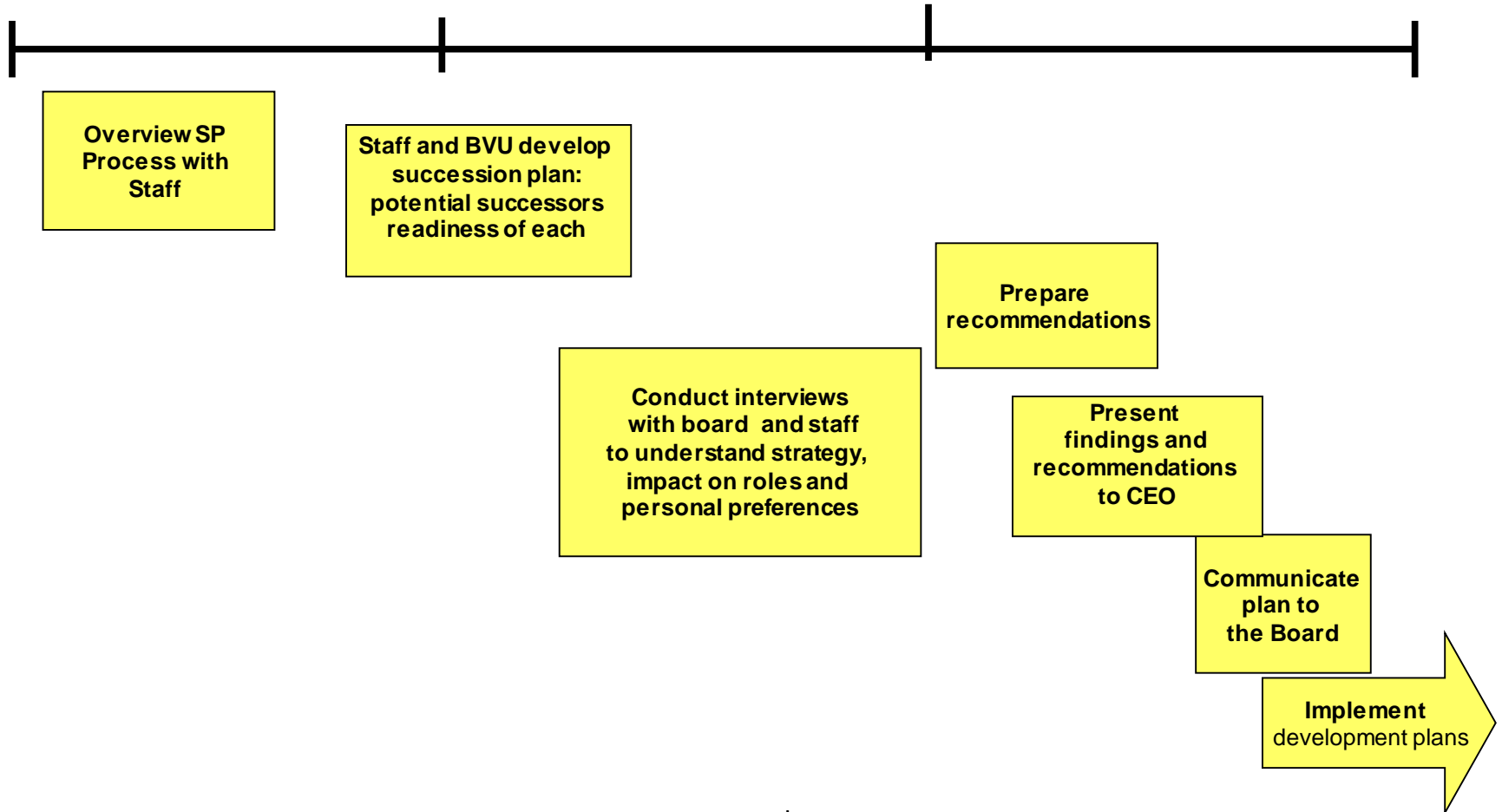


- Readiness Assessment – a perceived knowledge/skill gap that needs to be “bridged” for the individual to perform the job
- The larger the timing gap, the more training and development that will be required
- Preparation time is critical and gap sizes need to be realistic and managed

# Timeline

June

December



June – December 2014

# Responsibilities

## For the Board:

- Maintain and monitor the succession plan for the CEO.

## For the CEO:

- Maintain an organization-wide succession plan, including regular updates.
- Hold the *executive team* and HR accountable for the development of the staff.

## For the Executive Team:

- Manage the development of direct reports and personal aspirations as part of annual review processes.
- Identify development opportunities for high potentials.
- Provide mentoring, coaching and feedback to facilitate development.

## For the HR Function:

- Ensure that succession candidates have development plans.
- Provide administrative oversight for a 'high potential' team including: management of roster of individuals, review of individual development plans, and use for ongoing sourcing of open positions.



# Situation Analysis

## Reputation

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- One of the top six library systems in the country.
- Partner organization with neighborhoods throughout Cleveland and anchor for the community.
- One of the best collections nationwide
- CLEVNET is incredible resource for Northeast Ohio

## External Factors Impacting Agency

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- State funding is never a given but fairly stable
- Population is dropping/changing in the city and in neighborhoods
- Needs of the community have been changing rapidly.
- Must always stay at the forefront of consumer preferences (books, eBooks, tapes, streaming)
- Republican National Convention is an opportunity to highlight the library
- Technology advances impact medium of delivery

## Organization Structure and Workforce

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- 22% reduction in staff.
- No raises in four to five years – first raises to occur in 2015
- Early retirement packages have occurred – last round December 2014

# Situation Analysis - continued

## Strengths

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- Reputation as one of the top six library systems in the country
- Director Thomas has been a positive leader through a tumultuous time
- Incredible collection – top in the nation
- Finance processes are strong. Great controls
- CLEVNET is the best in the country – 40% of CPL circulation. Receive positive revenue stream through branches.
- CPL stays at the forefront of technology and remaining relevant to the community and consumers.

# Situation Analysis - continued

## Strengths

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- CPL – the Guardian Angel of the community – social service programs and open doors impact lives immensely
- Intellectual capital of staff in content areas is a major strength
- Staff very passionate
- No layoffs only reduction in staff through attrition
- Creation and focus of the Friends of CPL will be terrific for fundraising efforts
- Pressures of internal change have not been visible to the community. Due to staff's professionalism and commitment to mission.

# Situation Analysis - continued

## Vulnerabilities and Areas of Concern

- Loss of institutional knowledge
- Employee morale is fairly low due to turnover, raises etc.
- Resources are tight – staff feel overwhelmed in some areas
- Staff attrition occurred leaving gaps in some departments (HR AND IT)
- Financial concerns burden staff. Many feel CPL must act to reduce the # of branches.
- Administrators and Branch Managers are often bogged down with disciplinary matters.
- Human Resources is not nimble and unable to meet all the demands of the organization.
- Marketing – CPL is not being as strategic as it should be with collections and other content areas to maximize its impact
- Attention to diversity exists. This is an area of stress. Senior management is not seen as diverse.

# Key Recommendations

Annually review the pool of high potentials

- Keep an eye on diversity
- Ensure that high potentials are moving effectively through development plans

Human Resources

- Conduct an HR Audit with an external consultant to evaluate changes
- Compensation and benchmarking study should be conducted – particularly in risk areas such as IT.
- Policy and procedures review – audit
- With recent HR departures, new hires need to be strong. Employee relations professional would be a good addition – may free up Directors from some HR matters
- Organization Design review – benchmarks and best practices (staff ratios)

# Key Recommendations

## Leadership Development

- Team building
- External board experience

## Organizational Culture

- Due to major changes, a full culture check should be complete.
- Identify culture values and brand them! Create a culture brand/symbol that represents employees as a whole “I am a Librarian”. Bake it into all messaging.
- Many leaders believe they are public servants already. Build on this positive attitude.

## Marketing

- Publicize collections and capabilities
- Publicize what CPL is doing for the public

# Key Recommendations

## Upon Notice of Director Thomas' Resignation:

### Establish a Search Committee

- Identify top 3 to 5 strategic objectives that fall under Director responsibility.
- Identify 7 to 10 most critical competencies required to tackle these objectives.
- Determine whether to utilize search firm.
- Establish search, interview and hiring process and timeline.

### Establish a Transition Committee

- Along with new Director, create a development and transition plan.
- The development plan must be tied to key strategic initiatives with the focus on sustainability.
- Develop a formal communication plan (internal & external)
- Identify key spokesperson for organization.
- Develop Communication strategy for public release.

# Leadership Attributes Required of Next Leader

- Well regarded by the national library constituency
- Socially conscientious – in touch with Cleveland’s social needs.
- Inspirational and natural leader
- Ability to interact in a positive way with every person on the spectrum
- Business and financial acumen
- Innovative approach
- Cleveland pride
- Unflappable and even tempered
- Good sense of humor
- Mission driven
- Collaborative and ability to build consensus
- Understand landscape of local stakeholders
- Visionary
- High level of integrity and moral character
- Ability to fundraise
- Excellent communication skills – written and verbal
- Excellent public speaking and messaging abilities
- Media savvy



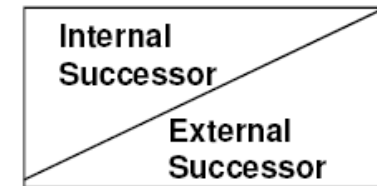
# Roles with Succession

## *Long-term Successors*

### Executives and Other Key Roles

Agency	15
% of Internal Candidates	88%

### Legend



#### Internal Candidates:

- Director
- Deputy Director
- CIO
- CFO
- Director of Public Services
- AD, PS Branches
- AD, Outreach & Prog Svcs
- Director, HR
- Director of Prop. Mgt
- Director, Marketing & Comm
- Director CLEVNET -
- Director of Technical Services
- Neighborhood Team Manager East
- Main Team Manager
- Acting Director of IT

#### External Hires:

- Chief Legal Officer
- Knowledge Manager

# Internal Successor Readiness

	Ready	Need Minimum of 1 Year of Development	Need 1 + Years of Development
<b>Executives</b>	5	8	2
<b>Percent of candidates that are Ready</b>	33%	54%	13%

## Ready:

- CIO
- AD, PS Branches
- AD, Outreach & Prog Svcs
- Director, HR
- Director of Property Mgt

## Minimum of 1 Year:

- Director
- Deputy Director
- CFO
- Director, Marketing & Comm
- Director CLEVNET -
- Director of Technical Services
- Neighborhood Team Manager East
- Acting Director of IT

## Minimum of 2 Years:

- Director of Public Services
- Main Team Manager