



# Best Practices for Succession Planning

Change is a constant, and as libraries in a shared print program experience leadership or staff changes, closure, or other events that affect their membership and participation in these programs, both individual libraries and shared print program staff are encouraged to consider the following best practices to ensure these changes are not too disruptive to either library or program operations.

The overall best practices, including the [Best Practices for Shared Print Programs Education and Awareness](#), encourage member libraries to create and widely share at the institutional level the appropriate documentation explaining their participation in a shared print program. This documentation may include specifics such as the location of retained titles; the approximate number of titles; name and contact information of staff formally or informally tasked with representing the library at the program level; as well as other local considerations for participation. At the program level, shared print program managers should have an ongoing and consistent communications plan that anticipates future changes and provide onboarding support for incoming leadership. These Best Practices may differ in focus depending on the transition (ie: change in leadership or library closure) and size of library.

*Each level below presumes all checks of any/all preceding levels.*

## Best Practices for Communication within the Member Library and with the Shared Print Program

**As part of regular maintenance, and in preparation for any changes in leadership (library or institutional), unexpected closings, or other changes that affect a library's participation in the shared print program.**

Good:

- The member library creates and maintains local documentation of participation in the shared print program, including timeline, reasons for joining the shared print program, record of participation and any documentation (MOUs), local impact/challenges (ie: weeding against the retentions, etc), what does it mean to have a retention commitment (and what is expected from libraries with retention commitments).

Better:

- The member library creates (if not available) appropriate documentation regarding expectation for member libraries to distribute and share within the institution to ensure understanding and knowledge of shared print at XXX institution.

Best:

- The member library includes shared print program staff in the list of people to be notified of any significant leadership or institutional changes.

**In the case of a library or shelving facility closing:**

Good:

- The member library notifies shared print program staff that the library/shelving facility is closing and that as such commitments will need to be reallocated to other member libraries.

Better:

- The member library works with shared print program staff in advance of known closing on compiling a list of titles committed to the SPP and identifying opportunities for reallocating commitments.

Best:

- The member library works with shared print program staff in advance of closing on compiling a list of titles committed and opportunities for reallocating commitments and where necessary ship items to other member libraries.

**In the case of new library leadership:**

Good:

- The member library notifies shared print program staff of a change in overall leadership at the institution.

Better:

- The member library notifies shared print program staff when library leaders plan to depart and provide contact details for replacement.

Best:

- The member library notifies shared print program staff when library leaders plan to depart and provide contact details for replacement. Arranges internal and external onboarding for interim and then permanent replacements.

**In the case of primary shared print program contact change:**

Good:

- The member library notifies shared print program staff that the primary SPP contact needs to be changed.

Better:

- The member library notifies shared print program staff that the primary SPP contact needs to be changed and provides contact details for replacement.

Best:

- The member library notifies shared print program staff that the primary SPP contact needs to be changed and provides contact details for replacement. Arranges onboarding for replacement primary SPP contact.

# Best Practices for Program Support to Member Libraries to Facilitate Transitions:

## As part of regular program management

Good:

- The program staff has at least one point of contact per member library.

Better:

- The program staff has more than one contact person per member library.

Best:

- The program staff ensures that at least one contact person is in the institutional leadership team.

## Communications plan for new staff/leadership at member libraries

Good:

- Program staff creates and makes available generic onboarding documentation.

Better:

- Program staff regularly offers high-level onboarding webinars.

Best:

- Program staff offers institution-specific onboarding for new leadership at member institutions.

*Each level below presumes all checks of any/all preceding levels.*

## Communication within the Member Library and with the Shared Print Program

Best Practice		Good	Better	Best
As part of regular maintenance, and in preparation for any changes in leadership (library or institutional), unexpected closings, or other changes that affect a library's participation in the shared print program.	Local documentation of participation, including timeline, reasons for joining the shared print program, record of participation and any documentation (MOUs), local impact/challenges (ie: weeding against the retentions, etc), what does it mean to have a retention commitment (and what is expected from libraries with retention commitments).	X		
	Create (if not available) appropriate documentation regarding expectation for member libraries to distribute and share within the institution to ensure understanding and knowledge of shared print at XXX institution.		X	
	Include shared print program staff in the list of people to be notified of any significant leadership or institutional changes.			X
Best Practice		Good	Better	Best

In the case of a library or shelving facility closing	Notify shared print program staff that the library is closing and that as such commitments will need to be reallocated to other member libraries.	X		
	Work with shared print program staff in advance of known closing on compiling a list of titles committed to the SPP and identifying opportunities for reallocating commitments.		X	
	Work with shared print program staff in advance of closing on compiling a list of titles committed and opportunities for reallocating commitments and where necessary ship items to other member libraries.			X
Best Practice		Good	Better	Best
In the case of new library leadership	Notify shared print program staff of a change in overall leadership at the institution.	X		
	Notify shared print program staff when library leaders plan to depart and provide contact details for replacement.		X	
	Notify shared print program staff when library leaders plan to depart and provide contact details for replacement. Arrange internal and external onboarding for interim and then permanent replacements.			X
Best Practice		Good	Better	Best
In the case of primary shared print program contact change	Notify shared print program staff that the primary SPP contact needs to be changed.	X		
	Notify shared print program staff that the primary SPP contact needs to be changed and provide contact details for replacement.		X	
	Notify shared print program staff that the primary SPP contact needs to be changed and provide contact details for replacement. Arrange onboarding for replacement primary SPP contact.			X

**Program Support to Member Libraries to Facilitate Transitions:**

Best Practice		Good	Better	Best
As part of regular program management	At least one point of contact per member library.	X		
	More than one person per member library.		X	
	At least one contact person is in the institutional leadership team.			X
Best Practice		Good	Better	Best
Communications plan for new staff/leadership at member libraries	Generic onboarding documentation easily available.	X		
	Offer regular high-level onboarding webinars .		X	
	Offer institution-specific onboarding for new leadership at member libraries.			X
Best Practice		Good	Better	Best
Internal program workflows to manage member information and facilitate contact information updates	List of all member library contacts.	X		
	Mechanism to gather member library information.		X	
	Regular solicitation of member library information to update existing lists/information.			X

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