



**NICOLET FEDERATED
LIBRARY SYSTEM**

LIBRARY DIRECTOR PLAYBOOK

Creating a Playbook for Management &
Transitions in Your Library

New Director Arrival



Wish List?

Annual Deadlines

Organized Files

Clear Expectations

Budget & Vendor Info

Passwords

Key Contacts

Password Manager

Ease of Use

Only need to remember one master password.
Access anytime from anywhere

More Secure

Passwords can be more complex, smarter

Perfect for Transitions

Retirements, resignations, leave of absence, etc.



Short or Long Game

Short Game: Day-To-Day Playbook

- Responsibilities & Expectations
 - Roles & Responsibility
- Keeping the Doors Open:
 - Transition Checklist
 - Managing Staff & the Facility
 - Managing the Board
 - Financial Documents & Budget Worksheet

Transition Checklist

Library Director Transition Readiness Checklist

	YES	NO
OPERATING		
Daily opening & closing procedures		
Payroll & bill paying instructions		
ILS instructions / procedures		
Purchasing & cataloging instructions / procedures		
Interlibrary loan instructions / procedures		
> For borrowing / lending via WISCAT		
> For borrowing out-of-state		
> For delivery service		
Labeled filing system for documents		
> Paper based: cabinets, binders, etc.		
> Cloud based: file sharing		
Logins / passwords system—secure and accessible		
HR DOCUMENTATION / POLICES		
Job application form accessible		
Job posting / advertising sources known / evident		
Job descriptions for all positions accessible (within 2 years)		
Performance evaluations for all positions conducted (within 2 years)		
Performance evaluation template accessible		
HR policy manual accessible		
New employee checklist accessible		

BOARD BUSINESS		
Board recruitment practices known and practiced		
Board education system known and practiced		
Board notebooks / documentation accessible (online preferably)		
Board business calendar developed and accessible		
BUILDING MAINTENANCE		
FFE inventory (Furniture Fixtures Equipment)		
Library contents insurance coverage accessible		
Safety inspection schedule		

	YES	NO
POLICIES & PLANNING & BUDGET		
Policies: written (within 2 years) and retrievable		
Policy review process / schedule in place		
Strategic planning document (within 3 years)		
Planning process / approach is evident		
Disaster response plan		
Budget spreadsheet		
TECHNOLOGY		
Computer maintenance schedule		
Computer hardware replacement schedule reviewed / budgeted		
Computer software upgrades reviewed / budgeted		
Internet equipment instructions (routers, servers, etc.)		
Wireless access instructions		
Website update instructions		
Website favorites bookmarked or cloud		

Short or Long Game

Short Game: Day-To-Day Playbook

- Annual Planning
 - Cycle of Programming
 - Calendar of tasks, deadlines, etc.
- Disaster Plan
 - Emergency Contact List
- Key Contacts:
 - Tribal Government
 - Board
 - System / DPI

Planning Calendar

Sample Annual Timeline and Critical Deadlines for the Library:

January

- Update Board info and send out new roster
- Review Annual Report Instructions
- Submit Annual Summation to System Validator
- Provide Trustee Training at Board meeting

February

- Complete Annual Report
- Attend Library Legislative Days
- Provide Trustee Training at Board meeting
- Board Approval of Library and Youth Support Services Grants

March

- Annual Report Due March 1
- Pay ILS Fees
- Pay WPLC E-book fees
- Provide Trustee Training at Board meeting
- Review Director's Playbook

Short or Long Game

Long Game:

- Principals of the Library Profession
- Professional Development
- Navigating your Tribal Government
- Building Board Relationships
- Navigating your Community & Community Organizations

Small Library Considerations

- 1** How will the Board manage director transition?
- 2** Do they understand their role?
- 3** Do they understand the hiring process within the tribe/county?
- 4** Do they have interview questions?
- 5** Do they have a plan for onboarding new director?

Departing Directors



Succession Planning

Short Term Leave

Who will take the reins if the director is absent for up to three months?

Long Term Leave

Who will take the lead if the director is absent for more than three months? Will an Interim Director be necessary?

Permanent Leave

Was the departure planned or unplanned?

Succession Plan: Permanent

- 1** Termination Checklist
- 2** Exit Interview
- 3** Peg's Retirement Checklist
Departures/Arrivals Transition Checklist



Questions?

Sources:

- “Proactive Planning for Library Staff Transitions,” Bonnie McKewon, State Library of Iowa, WebJunction 2023
- [The Public Library Director’s Toolkit](#), Kate Hall & Kathy Parker, ALA Edition 2019