

**Succession Planning:  
Preserving Organizational Knowledge**

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## **Introduction:**

As library professionals, our goal is to deliver efficient and effective library services. Employing quality, professional staff members from administrative support to direct patron assistance is the foundation in achieving high standards in public libraries. As a new library director, I was fortunate to join a professional team already in place in our libraries' regional administrative offices, and I quickly came to rely on their knowledge in of each in their respective areas of expertise. As I was becoming comfortable in my new role and felt like regional operations were running fairly smoothly, my Business Manager, Ann, informed me that she has plans to retire in just over a year. This gave me a little time formulate a plan for replacing her, but it also created a dilemma in staffing that I was unprepared for.

Ann joined the regional library staff in 1986 as an "Assistant to Cataloger and Book Processor". Within a few years, she began taking on some Human Resources responsibilities including the administration of Teacher Retirement and State Health benefits for regional and affiliate library employees. In 1996, Ann took on accounting responsibilities as well to include payroll and accounts payable. Her new responsibilities came with a promotion and change in job title to Business Manager, a position she has held for 22 years.

News of Ann's impending retirement quickly became a concern for our affiliate library managers as well as for myself. I began fielding questions about whether or not our new business manager will have all the same responsibilities that Ann has now? Will we hire from within? Will the position be full-time or part-time? Will they, as managers going to be required to take on more duties? With no immediate answers to those questions, and without even a job description that encompasses all that Ann is responsible for, I needed to formulate a plan, quickly!

Losing experienced staff causes gaps that can negatively affect library service, especially when the employee leaving is taking "a substantial amount of work, business, and operational knowledge that'll be difficult to replace or duplicate if internal systems to retain or

document this type of knowledge are non-existent” (Pena, UniversityBusiness.com). Are Georgia libraries, in general, prepared to continue normal workflow with minimal to no disruption when a staff member with a unique or specialized skill leaves their position? Using case studies, resources in professional literature, and surveys, this paper explores the tools and strategies that libraries need for effective succession planning as part of overall management practices and examines the preparedness of Georgia libraries when replacing valuable employees.

### **Case Studies:**

In researching succession planning, many public library directors were interviewed, on the condition of anonymity, and asked to provide details of a specific situation in which they lost a key employee with a specific skillset. These directors answered many in-depth questions regarding various aspects of the transition process, including the various obstacles they faced in replacing that specific employee, whether or not the library had a strategic plan in place to ease this transition, how they would handle the situation differently if presented today, and what they learned from the experience. Many directors also offered words of wisdom to others who may find themselves in similar circumstances.

In participating in this study, these directors helped to provide a clearer picture of the various obstacles libraries are facing in the replacing of institutional knowledge, of the strategic plans that are in place (or not) to smooth these transitions, and of what libraries can improve upon to better prepare for such instances in the future.

A select number of the case studies/interviews conducted have been included below. The pronouns “they” and “their” will be used in place of “he” or “she” and “his” or “her” to protect each director’s anonymity, as well as the anonymity of the employees discussed.

### **Case Study #1:**

In this interview, a public library director stated that they unexpectedly had their IT specialist resign, giving no notice whatsoever. This particular employee had worked in the library for a number of years and was extremely familiar with library practices and policy. The employee had worked themselves up from a library assistant through training and education, and the library system had also invested greatly in them through continuing education. Unfortunately this particular staff member had the passwords—all of them. Information, passwords, work orders, and system needs were not recorded at all. In addition, they completely ceased communication with the library system, providing no help whatsoever during the transition process. So not only did this person give no notice of their intent to resign, but also took vital institutional knowledge out the door with them.

The library was put in an awkward situation, having to apologize to patrons and explain why there were gaps in services and an inability to provide technology service to library branches as well. But, not only that, the library, which did not have a developmental training program or recruitment plan in place at the time, was left scrambling to fill the void. Fortunately, the director and several additional staff, with a little help from other library systems, were able to jump in and pick up the pieces, but it was an extremely stressful situation to say the least. In the long run, a staff member with a good amount of knowledge in the IT department was promoted from within and the crisis was somewhat averted.

In the aftermath, the director decided it was in their best interest to have in a plan for the future, just in case such a scenario decided to rear its ugly head in the future. They did this by making sure everything was recorded, from tech information records to logbooks to passwords and service requirements, etc. The system now cross-trains early and often, regularly discusses exit plans, and makes sure that institutional knowledge is shared. They record everything digitally and in print files and maintain records in a water and fire-safe location. In short, they stay prepared.

And, as far as a few words of wisdom, this director wants to remind other libraries to always offer help to other systems if possible. Someday your library system may just need their help. In addition, when it comes to limiting employee turnover and retaining existing employees, they recommend always treating staff members with respect and maintaining an appropriate salary base. Also, if the library must make cuts, it may be best to consider cutting services and/or hours rather than staff or offering poor wages. In this director's own words:

Often library systems absorb and limp along with an overworked, skeleton staff. This contributes to the "silent efficiency" that, in my opinion, harms us. At some point we must share the burden of the cuts, problems and difficulties with the public we serve. We must allow the public to know that we are struggling during times of huge cuts to funding.

### **Case Study #2:**

The next interview highlights a situation that unfortunately does occasionally occur, although it's rare. In this particular instance, a library manager passed away. Not only did this system have to deal with the tragic loss of a longtime employee who was well-respected and much-loved, but the hit to the library was made even harder by the loss of information this employee took with them.

Unfortunately situations often occur where employees do not want to relinquish the institutional knowledge they possess. They hoard information and refuse to cede any control whatsoever. This situation was very much like that, with the manager hoarding passwords, vendor/contact information, account numbers, and the like, making it extremely difficult for those left to take on those management responsibilities.

Fortunately the director had a great staff that was more than willing to help fill the void, to work additional hours until a replacement could be found, and to take on the responsibilities in which they were actually trained. Unfortunately accounts, contact information, etc. had to be recreated which, of course, was far from ideal.

At the time of this particular employee's passing, there was not a strategic plan in place to handle such an incident. However, because of the stress and difficulty this situation caused, the director has worked tirelessly to ensure this does not happen again. Cross-training has been a huge emphasis, as well as standardizing processes, and documenting and filing information that is crucial to fulfilling the duties of key organizational positions. In addition, the director has ensured that the IT department has access to all necessary passwords. A direct quote from this director states:

Everyone should adhere to the "bus test," meaning that if a particular employee gets hit by a bus tomorrow, it's important to make sure there is someone that can keep their job going. When staff wants to have complete control of their job or duties, make sure that they create a bypass or workaround so someone else can carry on. It doesn't mean that they aren't important. It means that they are so important that the information needs to be shared so the work will go on—in case of a BUS.

### **Case Study #3:**

In this interview, a public library director expressed their frustration that their finance manager, although they did provide two weeks notice, left abruptly and provided no reason for their resignation. It felt unexpected and completely left the system hanging and, as many in the library field can attest to, finding a finance manager with library/governmental accounting experience isn't a walk in the park.

This caused immediate stress, as this person was solely responsible for payroll, accounts payable, account receivable—basically all bookkeeping. Being a position not easily replaced, this left the director and other employees scrambling to fulfill all library accounting duties, despite having a lack of financial experience. The director and another employee sought training in the area from an accountant and have both since underwent financial training.

Although it was extremely chaotic at the time, the director said that they are extremely happy that it happened. They feel like it has better prepared them for similar situations and made the system as a whole stronger. It has also encouraged them to implement redundancy, cross-training employees to ensure that such a predicament does not happen again.

As a last word of advice, this director encourages other librarians to cultivate friendships with other directors, insisting that, "They might not be able to solve your problems but, at best, they may be able to buy you some time."

## **Surveys**

Using the research and case studies as a guide, a ten question survey was created to determine if library administrators identify key positions, have a succession plan, and how prepared they feel to replace a key position within their organization. The survey was distributed to professional librarians in both public and academic institutions, and eighty-four responses were received and analyzed. Of those responses, 82.1% indicated that they identified key positions for staff who perform critical tasks at their libraries and recognize that there would be a gap in service in the event of an unexpected vacancy. When asked if library administration currently had a succession plan in place to fill those positions, 48.8% answered to the contrary while only 22.6% said that they had a plan. In terms of the time required to replace a critical position within their organization, 36.9% were confident that would take less than 2 months, 44.1% estimated from three to six months, and 14.3% asserted six months to one year. Surprisingly, 5% indicated that it would take more than a year to hire and train an individual to meet job expectations.

When asked to describe the elements critical to a succession plan, overwhelmingly the answer was cross-training and careful documentation. The core competencies desired in a replacement were excellent communication skills, adaptability, and willingness to work as a team member. In essence, successors would be selected based on their ability to articulate

needs and expectations and work well with others rather than be selected for a specific set of skills that can be learned on the job. Administrators were also asked how well they managed succession planning in their libraries. Of the respondents, 3.6% felt they managed planning extremely well, 21.4% thought they handled it well, 26.2% were neutral, 19% answered fair, and 29.8% stated they did a poor job.

Overall, the survey indicates that the majority of library administration recognize the need for a succession plan and understand there are key positions and core competencies needed to fill those roles. Cross training existing staff and detailed documentation is critical to the preservation of organizational knowledge, and most administrators recognize this and are working to improve planning, to some degree. Despite understanding the need for a solid succession plan, our research indicates that many libraries are not prepared to deal with replacing a critical role and do not have a plan in place.

### **Resources on Succession Planning in Libraries:**

In researching succession planning and preserving organizational knowledge for libraries, both profession based sources and best practices from outside of the library field provided helpful information. There was some overlap in the descriptions of succession challenges and in recommendations for how to best meet those challenges. Examining commonalities with other fields can broaden how library leaders solve succession challenges in the larger context of change management, providing opportunities to discover new strategies and reassess priorities. For these reasons, both areas of research are included here.

### **Recommendations Based on Library Field Research:**

In 2010, ALA published a work that covers many concerns facing librarianship and succession planning. *Succession Planning in the Library: Developing Leaders, Managing Change* addressed topics such as:

- Spotting potential talent in employees

- Identifying areas of growth for these individuals with an eye toward increased responsibilities
- Tracking growth with tools such as standardized profiles and personalized plans

Along with assessing individual talent, the book describes ways to situate rising talent within the scope of organizational needs and then transitioning emerging talent into those areas of need, mutually benefiting the career of the individual and the health of the organization as a whole (Singer and Griffith, 47-68).

In order to make these puzzle pieces fit together, the authors examine how to best evaluate organizational needs through building bench strength and identifying key positions and competencies (Singer and Griffith, 15-26). A thorough examination of the library by its leaders is essential before scouring the landscape to fill key jobs-- you need to know what *is* a key job before you try to fill it. Tools, such as checklists, templates for plans, and guides for measuring strategic aspects of the organization provided by the authors help walk the reader through each stage of succession planning (see attached examples).

*Succession Planning in the Library* is a detailed and comprehensive work. Other articles in library publications echo the authors' recommendations, but stop short of offering concrete methods and specific tools to map the needs and talent within each library. "Successful Succession Planning in the Library: Building Bench Strength," published around the same time, provides a succinct overview of areas to look at when planning for succession. Topics such as "Partnering with HR," "Performance Management System," and "External Recruitment" point to helpful starting places when addressing succession planning for the first time-- or as if for the first time to generate fresh thinking, (Knight, "Succession Planning in the Library").

Likewise, Michael Stephen's Office Hours column from 2015 offers a take on "Nature or Nurture?"-- whether to look inside or outside when planning for future leadership within a system. He ultimately recommends a balance of both, and combined with the advice from other

writers, this seems like a practical approach when used with some of the structured analysis tools suggested by Singer and Griffith (Stephens, “Nature or Nurture?”).

### **Challenges Mentioned in Library Research:**

The thoroughness applied to the methods outlined in *Succession Planning in the Library* is also found in the authors’ predictions about the library job market climate following the publication of the book (Singer and Griffith, 3). Predictions include:

- Smaller pools of replacement candidates compared to the number of anticipated baby-boomer retirements
- Shortages of specific skills and experience
- Increased demands for training on basic library skills (in addition to continued education)
- Expanding definitions of qualifying skillsets (such as being bilingual or hiring/promoting non-MLS degree holding candidates)
- Acknowledging that many in the library workforce are in a “second” career or may only be interested in part time-work

These changes to the library job market add to the necessity of examining and adapting the library’s staffing structure. The overall consensus seems to be: look forward to the opportunities offered by the current climate, not backward in hopes of recapturing “what was” when replacing key staff. However, to be successful in maximizing new staff talent, library leadership will need to develop consistent habits and recurring methods for long term planning (Singer and Griffith, 1-13).

### **Recommendations Based on Business Practices:**

In the spirit of looking at challenges in new ways, reviewing sources from outside of the profession for best practices helps provide a well-rounded perspective on preserving

organizational knowledge and succession planning. For example, a parallel exists between libraries and family operated businesses. Family businesses are essential to economies around the world and range from very small to globally influential enterprises. The common denominator between library management and family businesses is the likely occurrence of sudden departures in key positions or leadership roles.

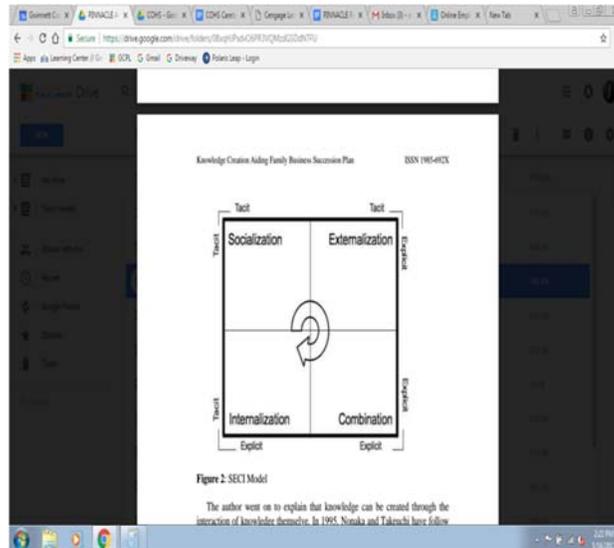
A 2016 study called “Knowledge Creation Aiding Family Business Succession Plan” explores the limitations faced by family businesses when older leaders (often the founders of the company) leave. The study references “the 4 D’s” as culprits: Death, Divorce, Disability, and Departure-- most of which could apply to a library, particularly those in small or tight-knit environments (Kalin et al, 65-66). In family businesses and other tight-knit workplaces like libraries, “tacit” job knowledge through close observation of someone’s responsibilities becomes the primary method of gathering important information. However, formal/ structured documentation of the information is often neglected, becoming a weakness later on should a disruption to the key position occur (Kalin et al, 78).

Much like Singer and Griffith, the study suggests a cyclical or ongoing method for integrating a would-be expert’s talent into the current expert’s skills and knowledge. However, “transferring knowledge alone is not enough, predecessors and successors have to customize and understand their own roles” within the method in order to have a smooth transition (Kalin et al, 81). In other words, there has to be “buy-in” and enough room in the process for personal investment from both parties within the overall method. The “Knowledge Creation” study’s method has four general phases, (see corresponding figure below):

1. the potential successor learns by observation of predecessor and workplace environment
2. the successor externalizes knowledge by creating documentation of information gathered

3. the successor examines external trends and data related to the workplace to combine with their initial observations
4. the successor has internalized existing and new data for updated expertise with which to take on the predecessor's role

#### Four Phases Model Chart:



(Kalin et al, 68)

Applying the four phases to library succession planning may be a useful guide for guiding an individual candidate's preparation for a specific role. Combined with some of the more granular tools offered by Singer and Griffith, library administrators may be able to more easily (and quickly) organize their efforts towards preserving organizational knowledge during times of change.

#### Challenges in Common with Other Businesses:

In "Succession Planning: What the Research Says," the author includes several challenges that mirror situations librarians often face. Issues such as general unpreparedness for succession, underestimating the time needed to prepare (years, not months), and conflict in

deciding to look within or outside for replacement candidates are common struggles that leaders should anticipate when thinking about preserving organizational knowledge in the long term, (Harrell, 70-74).

Another take on problems influencing succession are much more personal: emotional tensions surrounding a leader's decision to consciously plan for stepping down can hinder progress and the future health of the organization. The article "A CEO's Personality Can Undermine Succession Planning" directly examines these feelings and their repercussions on a business. Emotional impact on succession problems can easily extend beyond a CEO or Library Director to other specialized or key staff who may be sensitive to being "replaced." Interpersonal sensitivity combined with an appeal to the individual's valuable legacy could help ease someone into the mindset of participating in a constructive transition of organizational knowledge (Dattner and Chamorro-Premuzic, 2-5).

### **Which advice to take?**

Much of the advice offered in both business and library field research calls for continuous long term planning and establishing recurring habits. For example, four out of the "Seven Tenets of a Good CEO Succession Process" (Luby and Stevenson, 2-4)) hinge on repetition and conditioning the behaviors of higher management to focus on continuous practices around preparing for disruptions in key positions. Strategies such as "thinking 2 to 3 moves ahead," cross-training, keeping succession as a standing agenda item in high level meetings, and linking talent management to strategic planning are all part of a multi-layered, long-term approach. Leaders in the throes of change management may find this approach overwhelming. However, the repetition of these kinds of strategies found throughout succession planning research suggests that the upfront cost of developing ongoing habits pays off in the long run. Finding small ways to incorporate recurring succession planning efforts is key to normalizing change.

## Examples of Succession Planning Tools

### Example 1:

The screenshot shows a web browser window displaying a Google Drive document. The document is a worksheet titled "CHECKLIST OF TRENDS TO COUNT ON- WORKSHEET". The worksheet is a table with four columns: "Trend", "What are its implications for our library? How critical is this trend for us?", "What are the local consequences that will stem from this trend?", and "What action plans should we adopt to prepare for and manage this trend?". The table lists ten trends related to the workforce and education.

Trend	What are its implications for our library? How critical is this trend for us?	What are the local consequences that will stem from this trend?	What action plans should we adopt to prepare for and manage this trend?
<b>Aging workforce</b> with more generations in the workplace			
<b>More ethnic diversity</b> in general population, but not so much in library school graduates			
<b>Increasing lifestyle stage</b> variety and differences in how people will integrate work and other pursuits into their lives			
<b>Tightening labor markets</b> mean increasing competition for the best and brightest workers			
<b>Shortages of skills and experience</b> as baby boomers retire			
<b>Shortages of workers</b> once the economy begins to improve			
<b>Shortages of educated candidates</b> for increasingly technical jobs			
<b>Pressure on training and development</b> —employees will need to provide more of it directly			
<b>Tension around HR policies and practices</b> in compensation, benefits, and work arrangements must appeal to the new workforce with differing needs and preferences			
<b>Strain on organizational coherence</b> as the workforce diversifies and disperses			

At the bottom of the document, there is a copyright notice: "Copyright © 2016 by the American Library Association. All rights reserved. May not be reproduced in any form without written permission from the publisher." The browser's taskbar shows the date and time as 5/16/2017, 2:51 PM.

(Singer and Griffith, 18)

Example 2:

Succession Planning in the Library 4 Key Positions and Competencies.pdf

Open with

FIGURE 3.2  
INTERVIEW GUIDE TO COLLECT COMPETENCY DEVELOPMENT STRATEGIES

Use this interview guide to collect information about how to build competencies in the context of your library's unique culture. Select several exemplary performers who have been identified as especially good at demonstrating a given competency. Indicate that competency next to the label "competency" below. Then spend about 15 minutes to interview each exemplary performer using the questions appearing below. When you are finished, analyze the results by identifying common themes and patterns across all the interview results.

Competency: \_\_\_\_\_  
Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Years of Experience in Job: \_\_\_\_\_ Date: \_\_\_\_\_  
Interviewed by: \_\_\_\_\_

1. Think of a time when you were asked to demonstrate this competency.
  - a. What was the situation?
  - b. When did this situation occur?
  - c. What did you do?
  - d. How do you believe the experience helped you demonstrate this competency?
  - e. If you had a mentee or trainee, and she participated in an experience like this, would it help to build the competency?
2. Who are some people in this library who are exceptionally good at demonstrating this competency to whom you could refer your mentee or trainee?
3. What are some work experiences in the library that you believe your mentee/trainee should be given to build or demonstrate the competency?
4. How might the pressure to produce by specific deadlines help to build or demonstrate the competency?
5. Where would you send people—to what branch or department—to build and/or demonstrate this competency? (Where are the centers of excellence for this competency in the organization, and why do you think so?)
6. List special and specific work assignments that would be particularly useful in building or demonstrating this competency.
7. If someone asked you for advice on how to build this competency in this library, what advice would you give them?
8. Could you think of some upcoming or pending library projects that might be especially useful to build this competency? What are they, and why do you think they could help to build the competency?

The next step in identifying the competencies is to feed back the results to the exemplary performers to make sure that you heard what was said, to achieve consensus, and to verify that the assignments recommended would actually build the competencies. The competencies could then be linked to training and development needs as well as informing the succession planning and development process.

Source: Adapted from William J. Rothwell, *Effective Succession Planning: Ensuring Leadership Continuity and Building Talent from Within*, 3rd ed. (New York: AMACOM, 2005), 208.

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5/16/2017

(Singer and Griffith, 33)

Example 3:

**FIGURE 4.2**  
**INDIVIDUAL TALENT PROFILE**

Name:			
Title:	Performance Rating (HML)	Current	Prior
Location:	Potential (HGL)		
Hire Date:	Risk (HML)		
Date in Position:	IRP in Place		
# of Direct Reports:	Yes/No		
	Talent Code:		

TALENT CODE		
Potential		
KC	ET	P
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KC	KC	ET
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AK	IR	IR
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**COMPETENCY STRENGTHS/DEVELOPMENT OPPORTUNITIES/ACTIONS**

Library Core Competencies	Rating (1-5)	Development Action	Functional Competencies	Rating (1-5)	Development Action
Customer Service					
Teamwork					

**SUCCESSION PLAN/CAREER ASPIRATIONS**

Recommended Next Position(s):	Timing	Internal Successors	Library/Function	Timing

Internal Successors	Timing	External Successors	Library

**EXPERIENCE AND EDUCATION**

Positions w/ Library	Years in Job

Positions Prior to Joining the Library	Years in Job

Degree or Certification	School or Association	Date Received:

Completed by: \_\_\_\_\_ Date: \_\_\_\_\_

(Singer and Griffith, 50)

## **How to Establish a Succession Plan**

Our research has shown that many public libraries in the State of Georgia are aware of the importance of having a Succession Plan but only a small percentage of them have actually developed and prepared a plan.

Within the next few years, many librarians, especially those holding the top-level positions such as directors, associate directors and heads of libraries, will be retiring. The Bureau of Labor Statistics said that more than three in five librarians are age 45 years or older and will become eligible for retirement in the next 10 years and libraries must have a strategy for developing leaders so that they are ready to assume key and leadership positions in the near future (Nixon, 249, 251).

The following seven steps will assist in establishing a succession plan for your library:

### **1. Identify Critical Positions** (Half, 2):

- Identify the positions that you can't give up and must have in order for your organization to operate effectively and efficiently. Identify the positions that are difficult to fill internally as well as externally.

### **2. Forecast Future Vacancies**(Fulton County Government Personnel Policy, 334-16):

- Identify possible upcoming vacancies such as planned retirements, potential turnover, FMLA, etc. This will guarantee that you have staff available, ready and waiting to fill new roles.

### **3. Identify Potential Employees**(Nixon, 256-257):

- Conduct an Internal Search- Give your staff the opportunity to be considered for job openings. This will provide a lower transition risk and will boost employee morale.
- Run External Searches concurrently with internal searches- This will provide the best opportunity to identify the best candidate for the job.
- Hire Interns- You will be able to develop future librarians while also evaluating them to see if they will fit into your organization.

- Interim Positions- A vacation is a great time to have a potential successor to step in and assume responsibilities. The employee will gain experience while you learn how prepared the person is to take on a bigger role.
- Loaner Staff- Borrow staff in similar positions from other departments to temporarily fill key positions.

#### **4. Transfer of Knowledge** (Masias, Michele, 5-7):

- Shadowing, Mentoring, Leadership Development Training and Written Procedures will help develop staff knowledge, skills and abilities to prepare them for advancement and promotion. This keeps responsibilities from falling through the cracks and allows for the successor to know key information to perform the duties. The employee is able to observe a job in action.

#### **5. Reconsider Your Team Configuration:**

- Operate at a Level of Over Capacity- Hire two part-time employees instead of one full-time employee. This may save the company money and provide the means for the job to continue in the absence of one employee. The job duty will always be completed and the person will have the knowledge to complete the task.

#### **6. Know Your Team's Interest and Needs:**

- You should be in constant contact with your staff to know their plans for the future and of any upcoming moves or changes. Pay attention to the employee who appears tired of their job, no longer engaged, has upcoming life changes such as a baby, marriage, and has a desire for promotion or growth.

#### **7. Support the Successor** (Miles, 2)

- A good team, mentors, coaching and a feedback-rich environment provides the support and confidence needed for the employee to make a successful transition into the new position.

Having a succession plan in place saves the library a few of its most precious resources: TIME and MONEY. It also better prepares the library to deal with emergency loss of staff and to effectively and seamlessly pass information on from one employee to the next.

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