



Departures and Arrivals

Transition and Succession Planning

Wisconsin Trustee Training Week
August 24, 2021

Kate Hall, Northbrook Public Library Executive Director
Kathy Parker, Library Consultant & Retired Library Director





Who we are



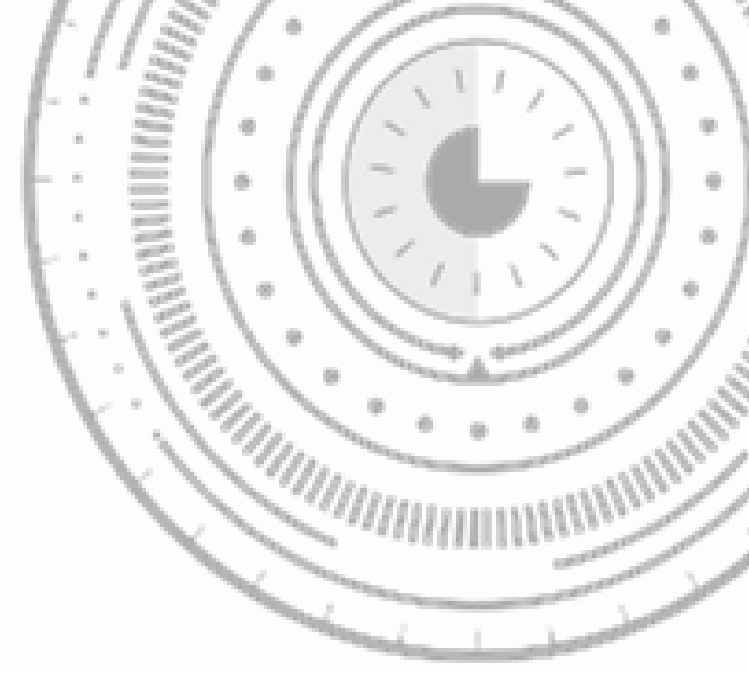
Kate Hall

Executive Director
Northbrook Public Library



Kathy Parker

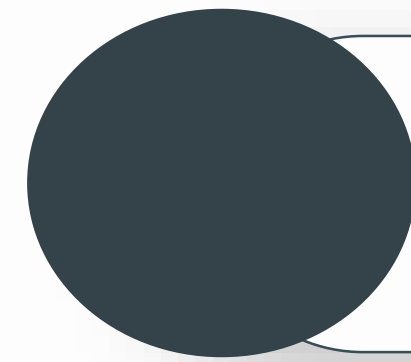
Consultant & Retired Library Director
kathyparker consulting



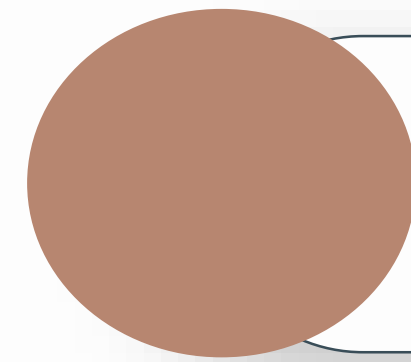


Who are you?

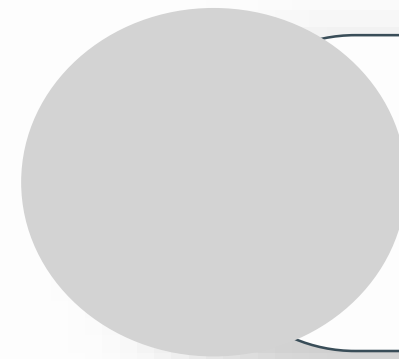
What are we covering today?



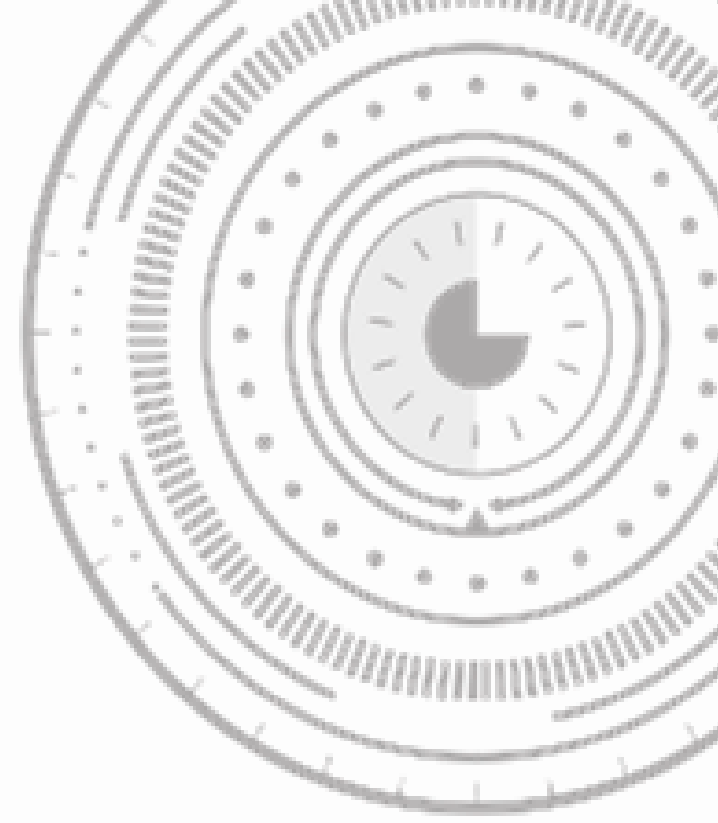
DEPARTURES: What to get ready for the new director



ARRIVALS: How to onboard a new director



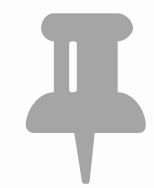
CONTROL TOWER: Understand the role of the board
during departures and arrivals



Pre-Trip Planning



Pre-Trip Planning



Making a List and Checking It Twice



Departures

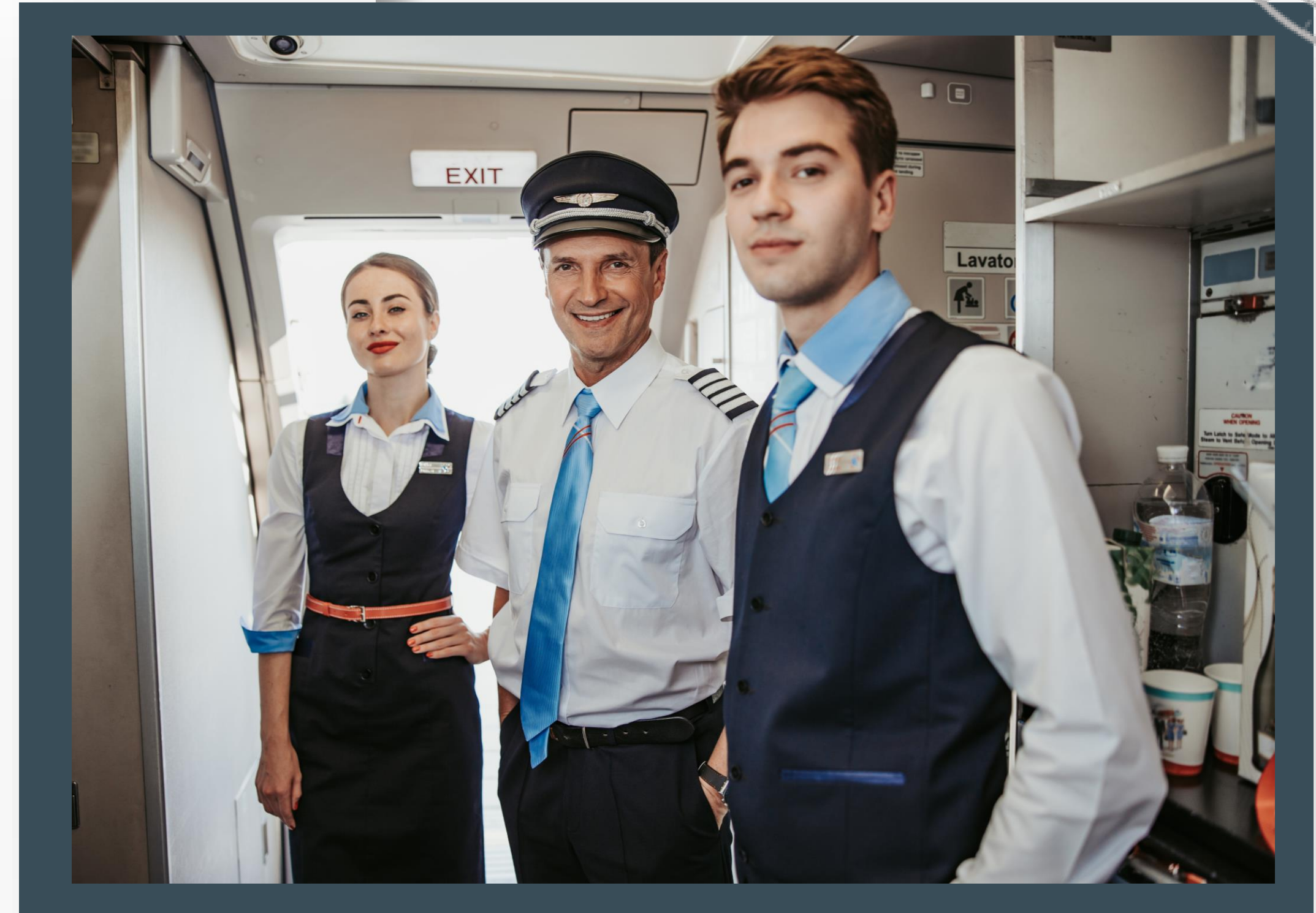
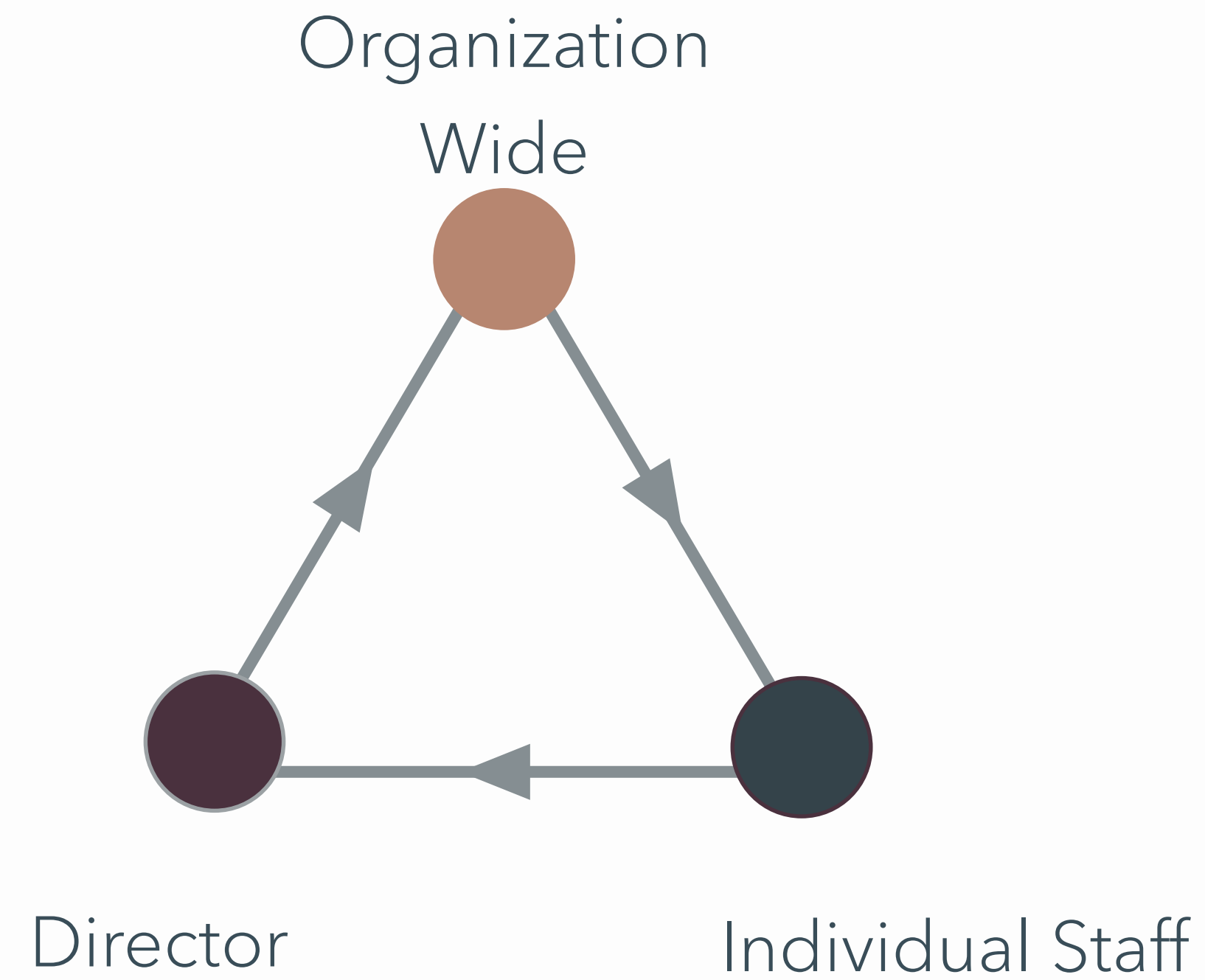
Prepping for the New Director

- 01 Personnel
- 02 Finances
- 03 Board & Legal
- 04 Building & Technology
- 05 Community Connections



Departures

Personnel





Control Tower



Departures

Finances



Budget



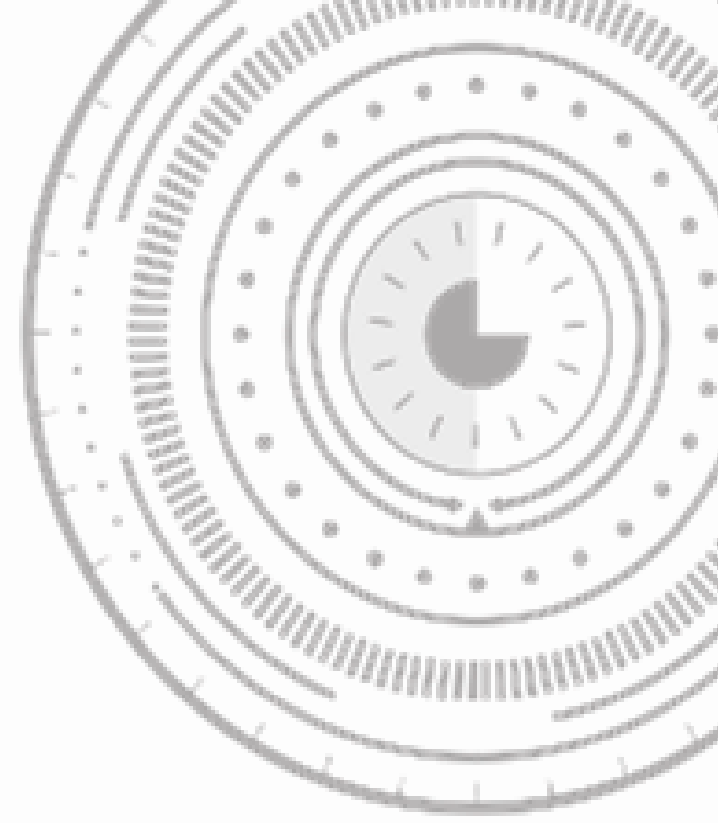
Monthly Financials



Audits

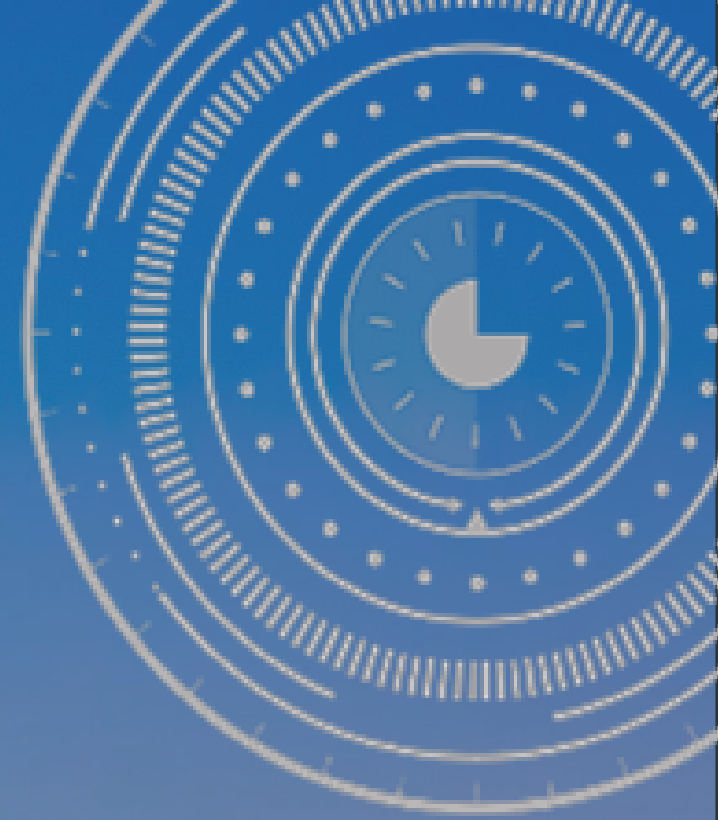


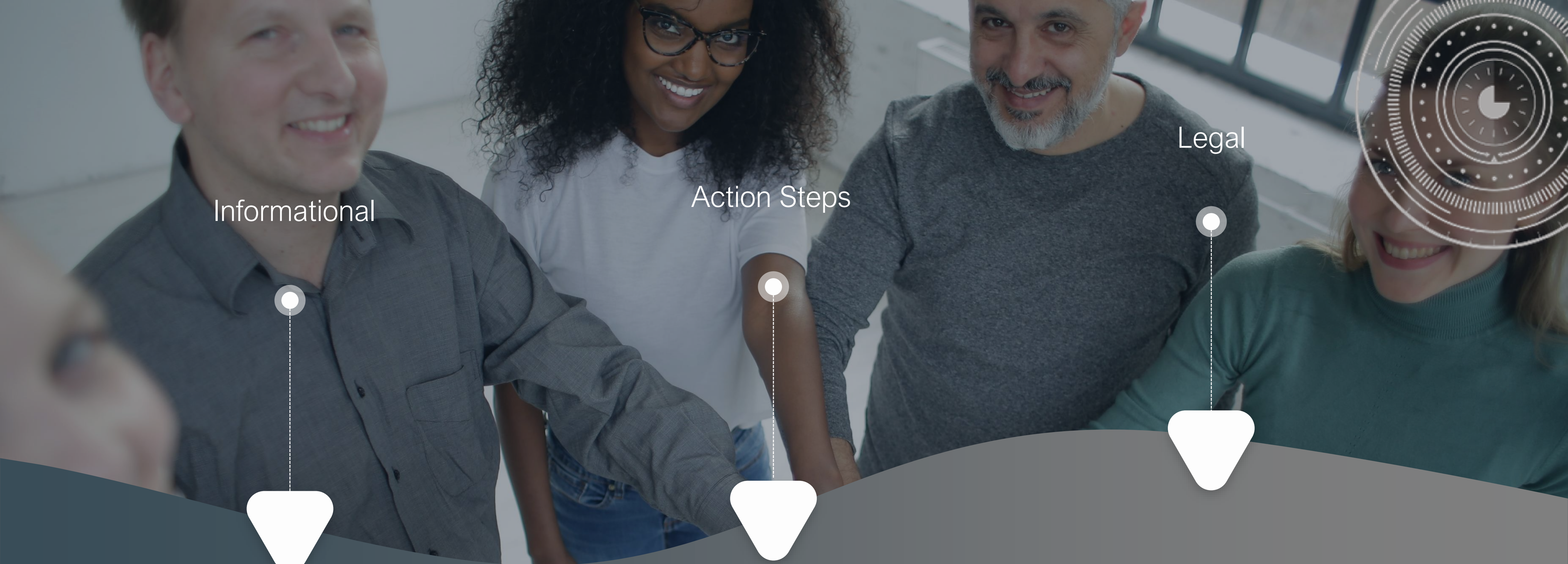
Key Information





Control Tower

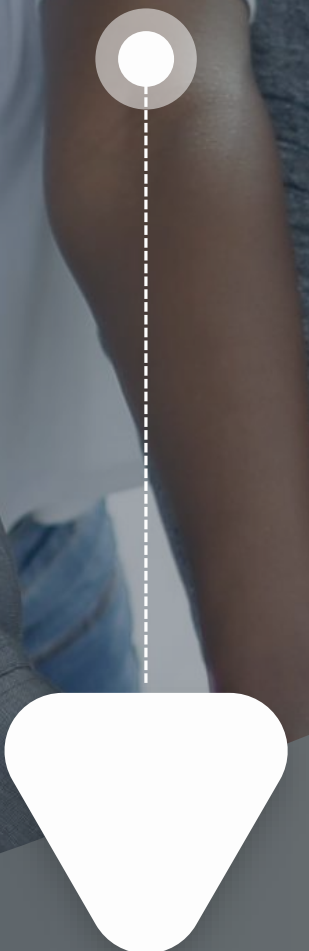




Informational

Action Steps

Legal



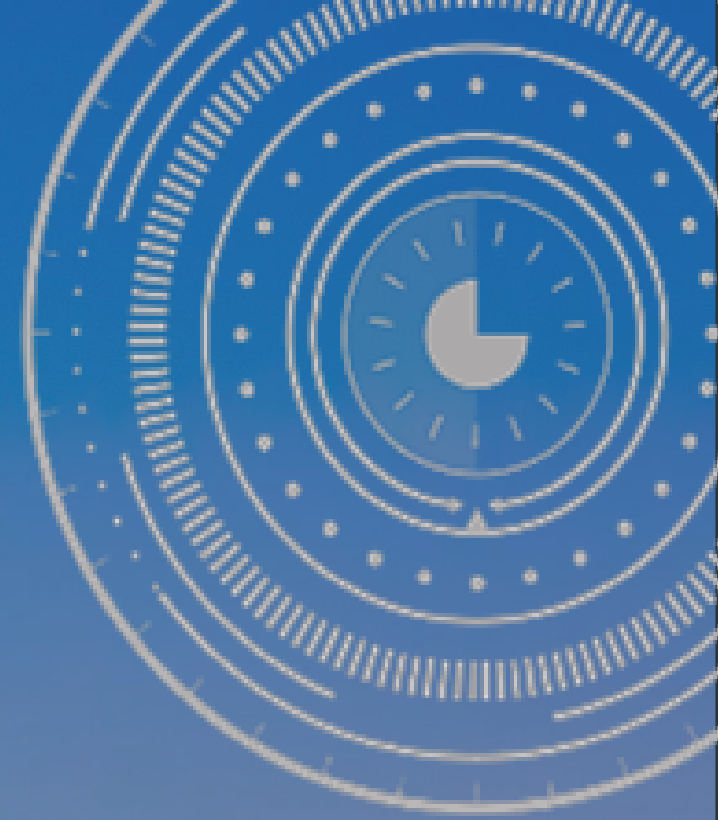
Departures

Board & Legal





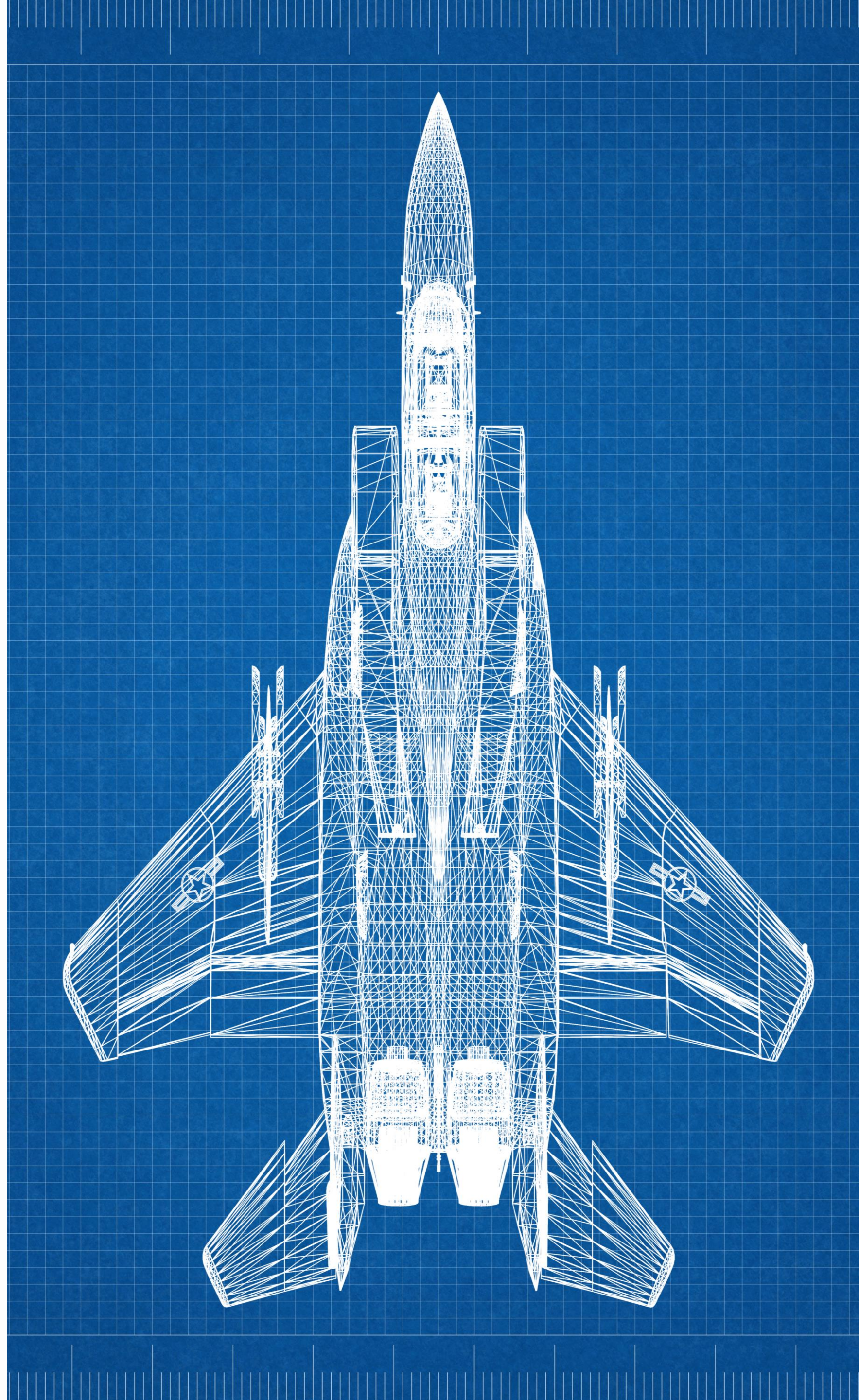
Control Tower





Departures

Building



Plans, Plans, and More Plans

Blueprints

Vendors and Contracts

Insurance

Technology Planning

Inventory

Logins & eFiles

Website

Social Media



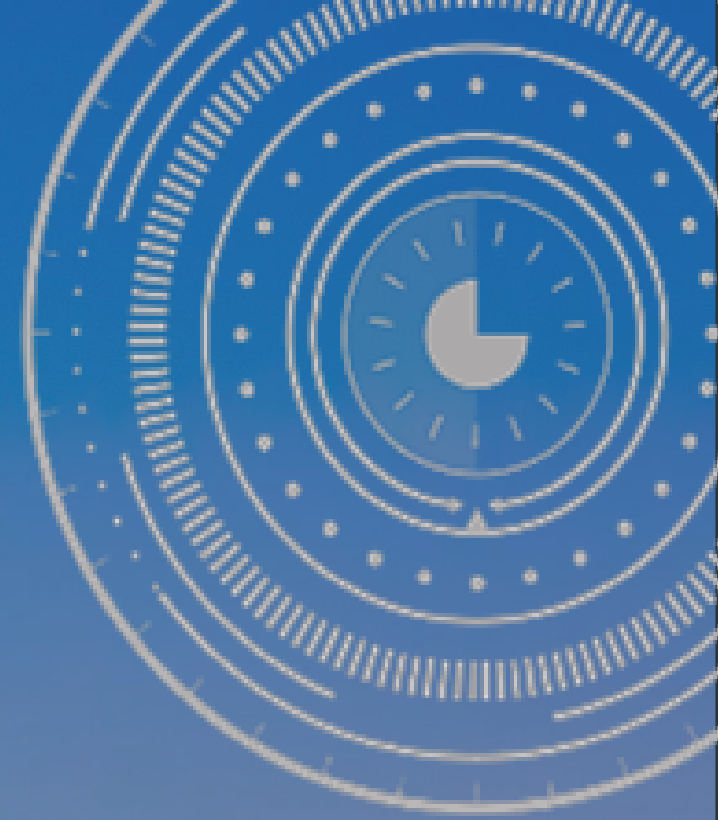
Departures

Technology





Control Tower



Departures

Community Connections



Library



Community





Control Tower





Keeping it Organized



Start early

Filing

Clean Desk & Shelves

Records Retention

Sudden Departures





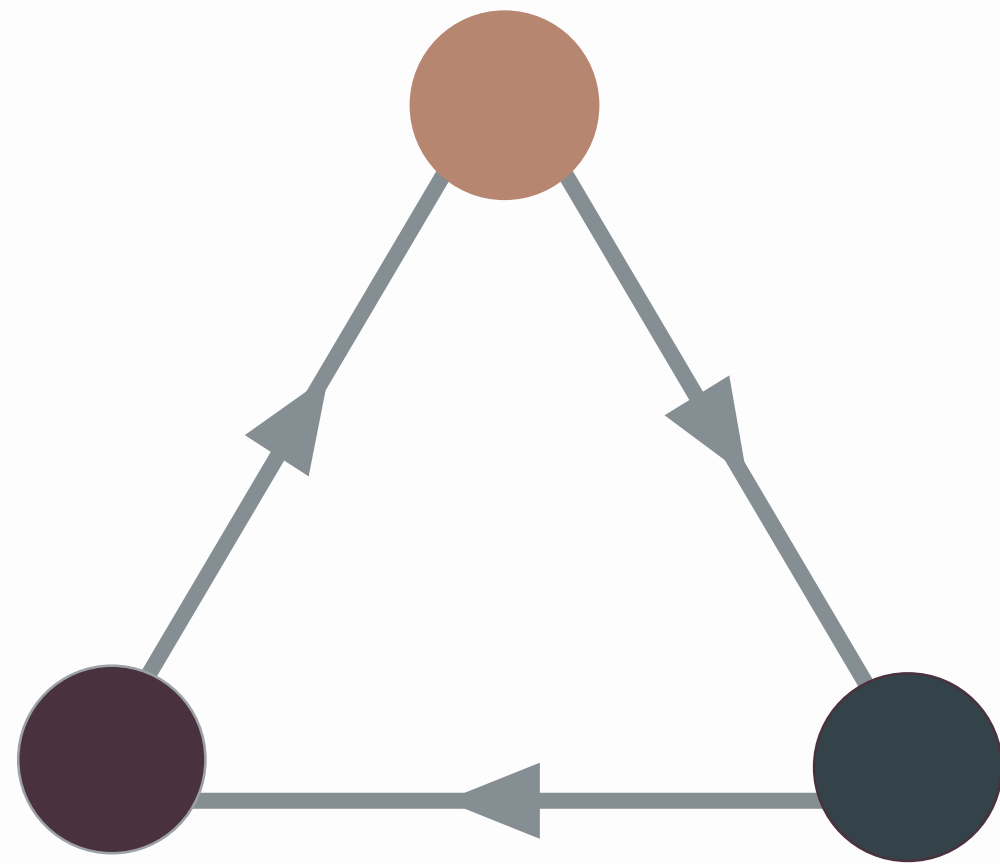
Arrivals

Transitioning the New Director

Arrivals

Laying out Responsibilities

Incoming Director



Board

Outgoing
Director





Control Tower



Arrivals

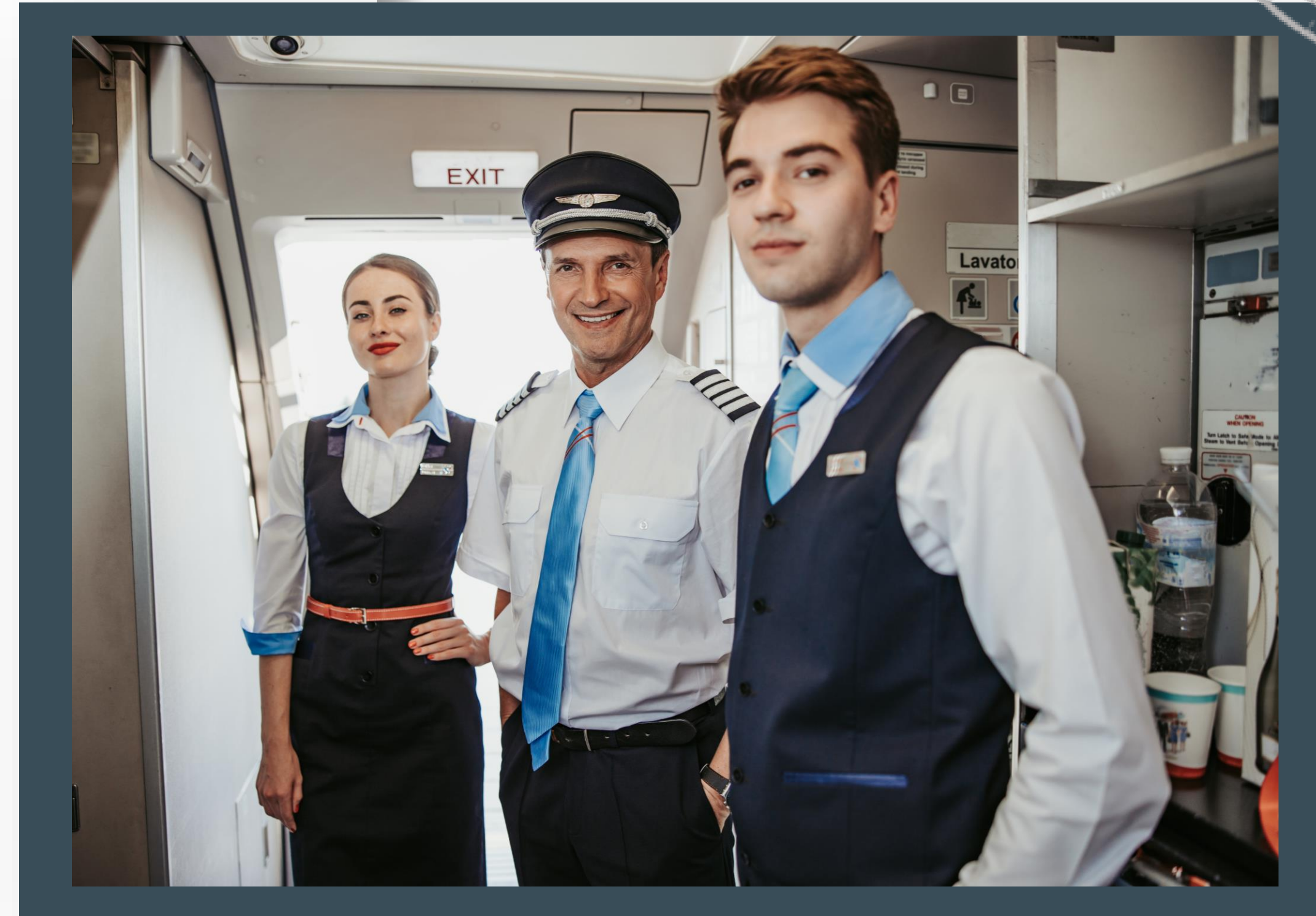
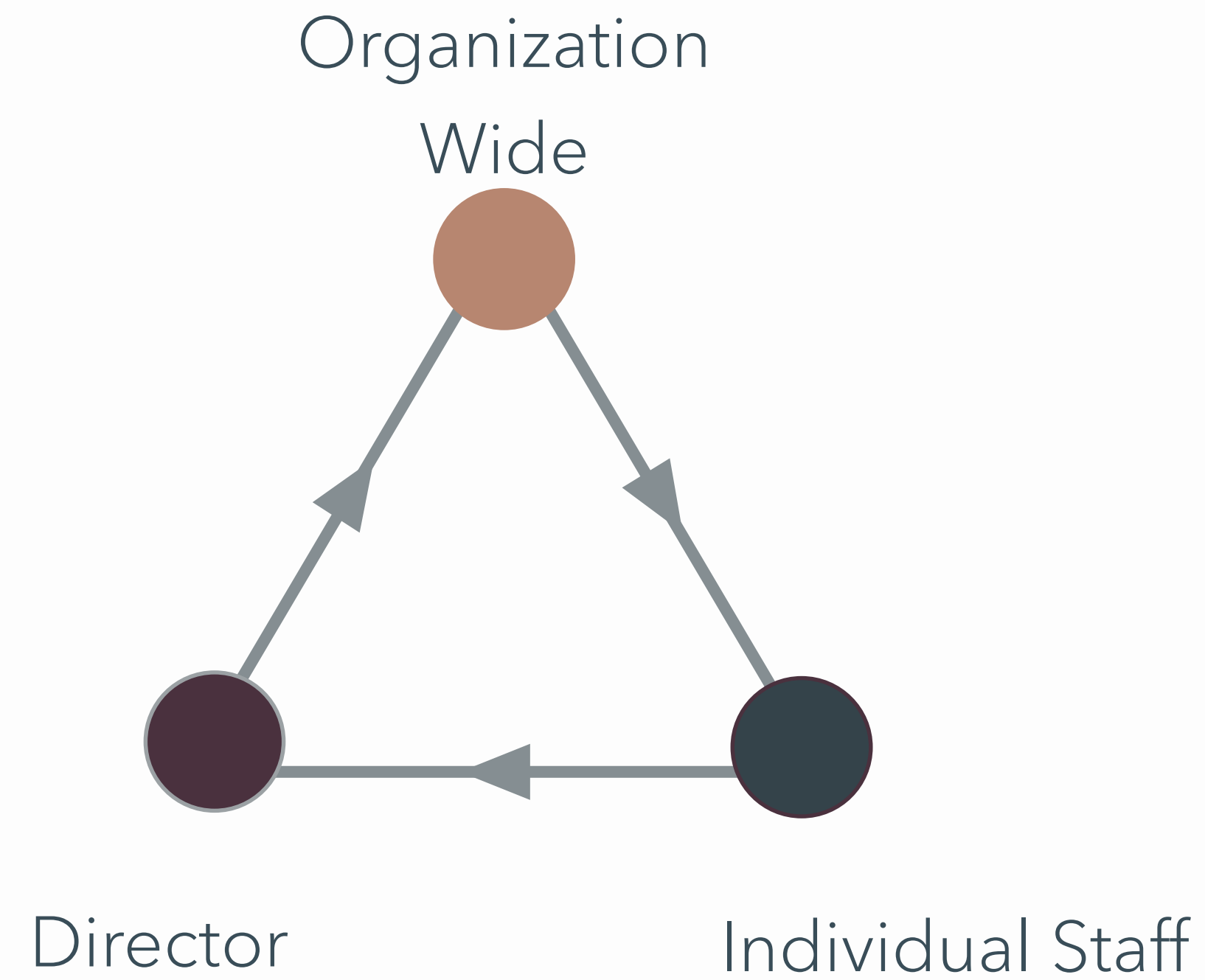
Onboarding a New Director

- 01 Personnel
- 02 Finances
- 03 Board & Legal
- 04 Building & Technology
- 05 Community Connections



Arrivals

Personnel



Arrivals

Finances



Budget



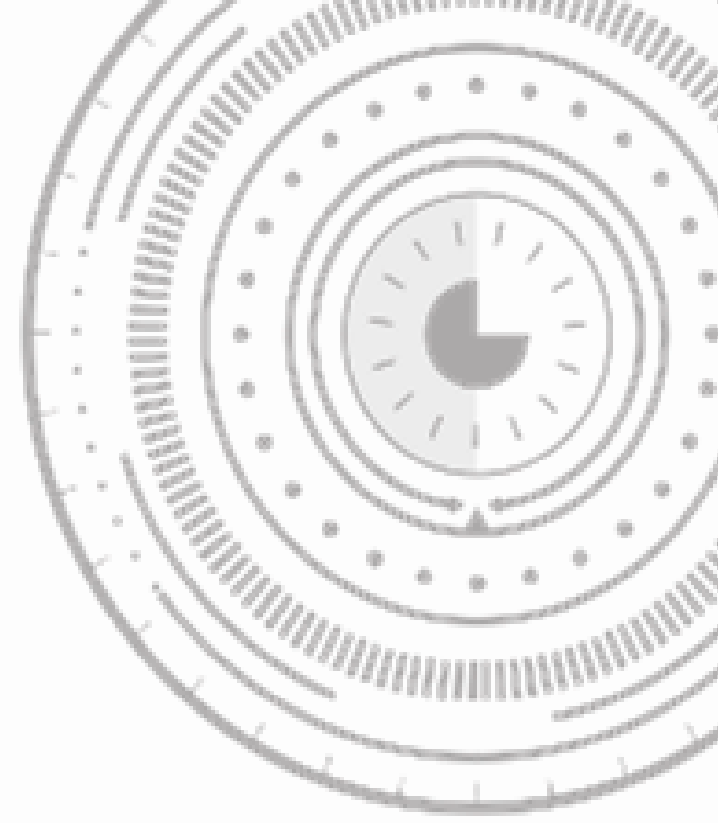
Monthly Financials



Audits



Key Information



Getting to
Know You

Review
Documentation

Board
Meetings

Keeping
It Legal

Arrivals

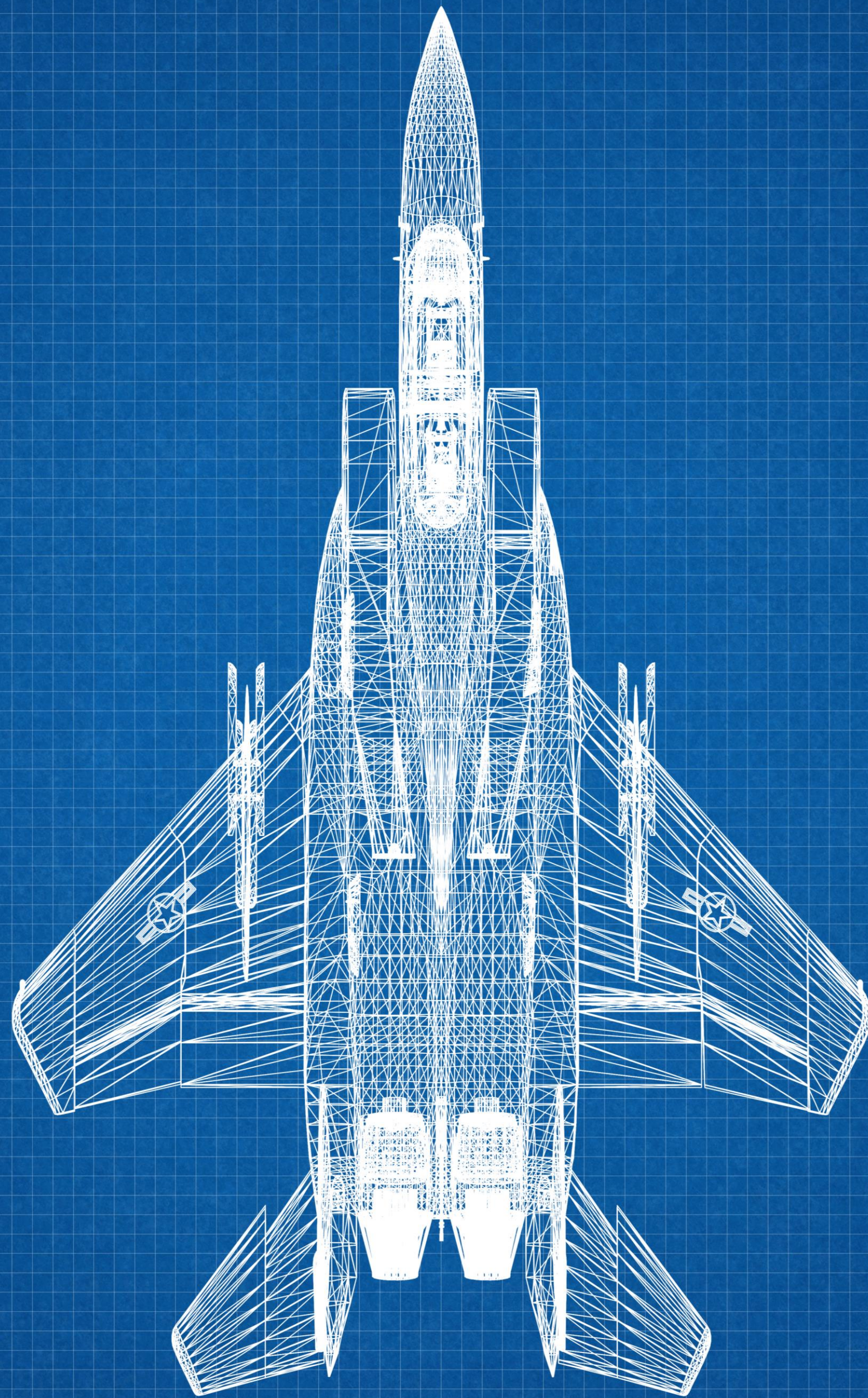
Board & Legal





Arrivals

Building



Tours & Plans

Emergency Procedures

Vendors & Contracts

Current & Needed Projects

Technology Plans

Inventory

Logins & eFiles

Website & Social Media

More Tours



Arrivals

Technology



Arrivals

Community Connections



Library



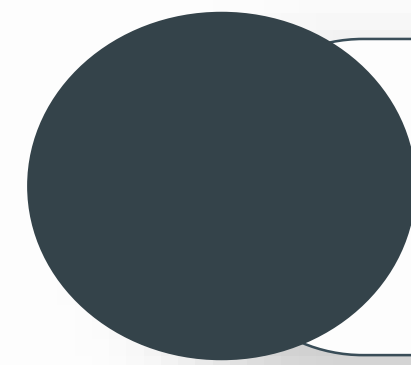
Community



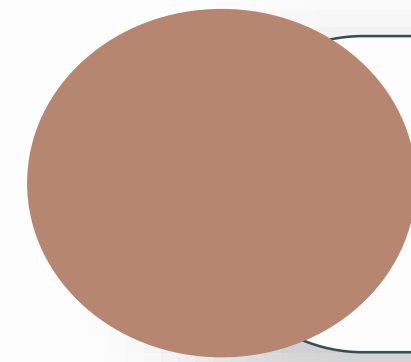
Post Trip Review



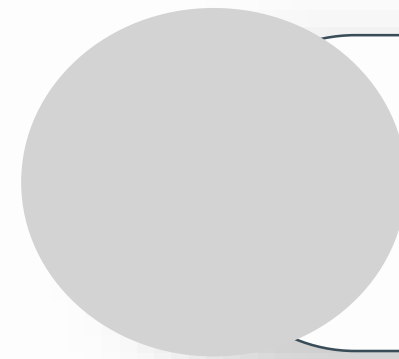
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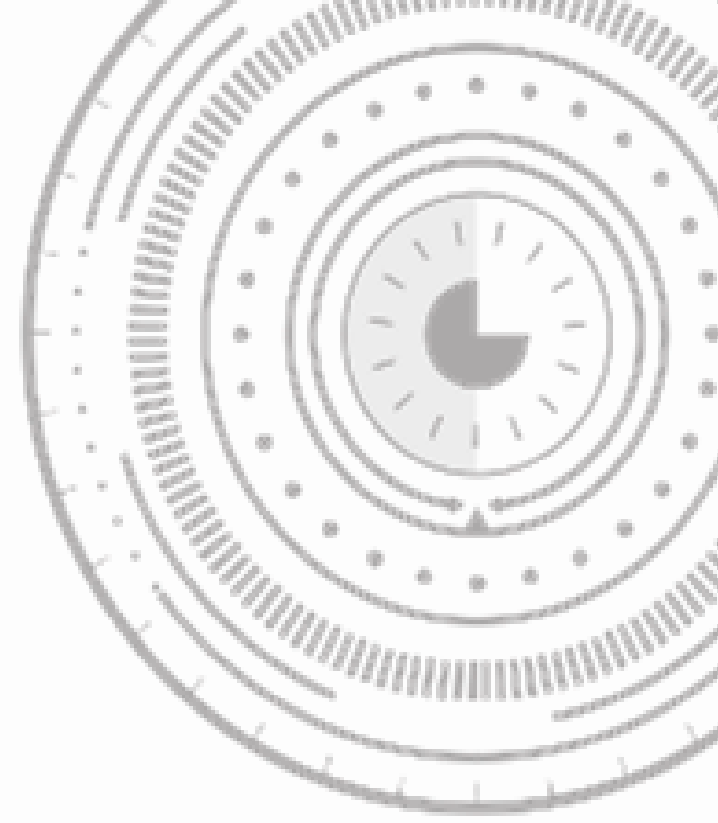
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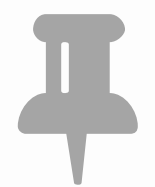


CONTROL TOWER: Understand the role of the board
during the transition process

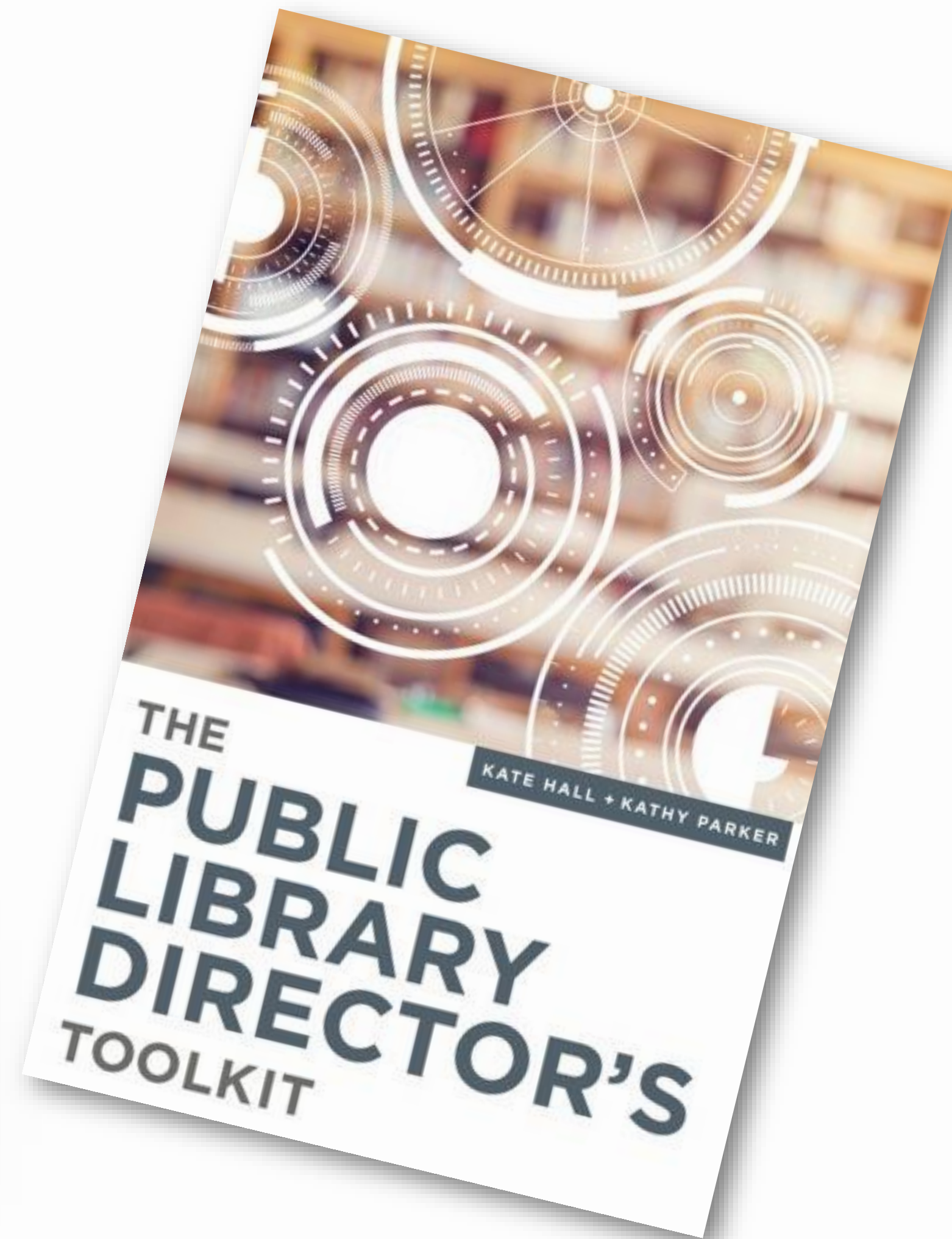


What's Next?

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Kate Hall & Kathy Parker
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