

Checklist for Transitioning Library Directors

While transitioning between leadership isn't typically a quick and easy move, there are some steps which the board can take to make the switch a smoother process. Below are some considerations as compiled by best practices. The library may not need to follow each point strictly as depicted below, but feel free to use this document as a guideline for starting points. If your board has any questions or seek a sounding board at any point in the process, please don't hesitate to reach out:

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Part I: Prior to the Director Leaving

Proper documentation regarding director's exit

- Resignation letter
- Retirement letter
- Documentation regarding board removal of the director, showing the board's clear steps that follow library personnel policies for evaluation and termination

This, along with copies of director evaluations, should reside in the director's personnel file until your retention records policy deems it appropriate to remove and destroy.

Exit Interview (if possible/applicable)

Exit interviews are a great way to have a conversation with the director prior to leaving to learn of any issues or ways the board can help with a smooth transition. It can give insight into the library environment and working conditions, and give information to the organization as it transitions to new leadership. Consider questions that will help the board gain the meaningful information, such as (but not limited to):

- Why are you leaving this position?
- What did you find most satisfying about the job?
- What did you find the least satisfying about the job?
- What would you change about the job?
- Were the job duties as you expected when you started?
- Do you feel that you received proper training to do the job effectively?
- Do you feel that you received adequate support to do the job?
- Do you have any suggestions for improved personnel policies or procedures?
- Do you have any suggestions that the board might use to work effectively with the next director?
- What skills and qualities should the board look for in the next director?
- Are there any special issues connected with the administration of this library that you think the board should be aware of?

A copy of the responses should reside in the director's personnel file until your retention records policy deems it appropriate to remove and destroy.

Notify any individuals/organizations of the vacancy

Please notify the district consultant, system administrator (if applicable), overseeing municipality (if applicable), and community organizations (if applicable).

Gather information/materials

Depending on the nature of the exit, some of these may need changed upon the director's departure.

Account information Account numbers, usernames, and passwords for library accounts and online access	Email accounts, social media accounts, utilities, Office of Commonwealth Libraries accounts (PA Counting Opinions/LibPas), bank account information (online access or bank site access, signers), credit cards
Keys/Codes	External/internal entrances, file cabinets, lock boxes or safes, security codes, mailboxes
Places where the director's name will need to be changed – in the interim and upon welcoming the new director	Bank account access, credit cards, letterhead, business cards, signatures on preprinted materials, email signatures, website, etc.
Contact information should a need or an emergency arise during the transition	Board, staff, volunteers Utility companies, electrician, plumber, accountant, and any other individuals/organizations which the library relies on for day-to-day operations or unexpected situations/emergencies

Part II: Finding a New Director

Form a search committee

Individuals may include library trustees, librarians from area towns of similar size, close municipal stakeholders like a town manager, or key community stakeholders from partnering organizations.

Review the library's mission statement, strategic or long-range plans, short term goals, or any major changes taking place in the community

This information may ultimately influence the board's choice in candidate(s) or be reflected in updating any related documents. This allows for an opportunity for the board and the new director to start the relationship on the same page.

Develop a list of desired characteristics/qualities/skills in a new director

What are the most essential qualities that the board wishes to have in a director? As the board prioritizes this list, consider what can be outsourced, such as bookkeeping or payroll, and the costs to cover those tasks.

Keep in mind that each person that comes into this role will have a different set of skills than their predecessors. A director tends to “wear multiple hats” on any given day, so what kind of personality traits does the board seek? What kind of skills does the board wish to see related to administration, financial management, public relations, organizational development, or management of people? This may also be a good time to ask staff what qualities they would like to see in a director (their boss).

Reach out to your district consultant. They work with libraries of a variety of sizes and can provide insight or resources on balancing duties and expectations.

❑ **Review personnel policies**

This is a great time to review how the director accrues sick/vacation/personal time as part of their hiring package. Boards are encouraged to revisit their personnel policies to include paid-time off for unexpected quarantining or illness during these times of uncertainty and in the future.

❑ **Review salary/wage schedule, benefits, and other information**

- Current minimum wage for hourly positions: \$7.25/hour
There are conversations taking place at the federal level that talk about the raising the minimum hourly wage to \$15. While Congress may not vote this in, begin considering how the library might cover hourly wages for all workers if the minimum wage was raised to even \$8, \$10?
- Salaried Employees - Overtime exempt minimum
 - As of October 3, 2020: \$684 per week, \$35,568 annually – this is the current level required by federal law
 - On October 3, 2021, state law increases the minimum \$780 per week, \$40,560 annually
 - On October 3, 2022, state law increases the minimum to \$875 per week, \$45,500 annually
 - View the information at PA Department of Labor & Industry <https://www.dli.pa.gov/Individuals/Labor-Management-Relations/llc/Pages/Overtime-Rules.aspx>
 - Fact Sheet #17A: Exemption for Executive, Administrative, Professional, Computer & Outside Sales Employees Under the Fair Labor Standards Act (FLSA): <https://www.dol.gov/agencies/whd/fact-sheets/17a-overtime>
Review the duties test to ensure that an employee’s job meets all of the criteria to be considered salary exempt.
- Benefits package: Review any other type of benefits available to the employee such as health insurance and retirement contributions.

Talk with your accountant or bookkeeper about situations that may affect your particular library. They are likely to have more up-to-date information.

❑ Develop or update a detailed job description of the position

Review the library codes, regulations, and standards relevant to your library, including director certification.

Service Area Population	Required Certification of Library Director PA Code
0-9,999	Library Assistant
10,000-19,999	Provisional Librarian
20,000 +	Professional Librarian

Service Area Population	Required Certification of Library Director Within a System: PA Code (System Certified no longer an option)
0-14,999	Library Assistant
15,000-19,999	Provisional Librarian
20,000 +	Professional Librarian

Do not simply use the job description of the outgoing director as the board may wish to redefine the job, elevate the position. Review skills and abilities the new director should possess to best achieve the board’s goals for the library. Consider soliciting input from staff, Friends and other stakeholders. This analysis should result in clear written documents that define the job and desired qualifications.

Some of the skills and abilities may include:

- Experience in administration, outreach, programming
- Ability to work with library boards and government officials
- Supervisory ability
- Fiscal skills including budget preparation, administering within a budget
- Policy development
- Customer service
- Leadership
- Dependability
- Management skills
- People Skills
- Good writing and oral communication skills
- Interest in furthering library development

❑ Compose advertisement and consider any costs the board might incur for posting ad or as part of the hiring process

Elements to include in the advertisement

- Job title
- Brief description of the job
- Required skills/qualifications
- Salary/wage/benefits (note part-time or full-time)
- Clearances required (See Section III)

- Contact information for questions/submissions and how the board would like to receive applications (mail, email, drop off at library)
- References information (Only contact information? Letters of reference?)
- Who any letters of interest or recommendation letters can be addressed to
- Deadline for submitting applications

☐ Place the advertisement

Provide an ample time period for qualified candidates to compile application materials and submit. Write down a list of locations where the advertisement will be posted and who will be responsible for posting.

☐ Acknowledge receipt of application

Send an email to each applicant acknowledging their application.

☐ Compose interview questions and/or rubric

Interview questions can span a variety of topics – whether they’re situational/scenario based “What would you do if...”; community-related questions; or general questions that reflect the desired traits the board would like to see in a successful candidate. The same questions should be used for each candidate.

Criteria that *should not* be targeted during the hiring process includes gender, race, creed, religion, age, country of origin, sexual orientation, or physical handicap. During an interview, questions that should not be initiated (or continued of candidate approaches first) relate to marital relationship (maiden name, spouse’s name or occupation), plans for having children or age/care arrangements of children, short or long term health status or previous illnesses, military discharge, prior arrests, or other topics that could be deemed discriminatory.

☐ Review applications and select candidates to be interviewed by search committee

Review if there are any stipulations according to library policies or overseeing municipal policies (if applicable) regarding minimum number of applications to receive or number of candidates to interview.

☐ Schedule and conduct interviews

These may be done in-person, by phone, or virtually. Be sure to supply the candidates with any information they would need to successfully arrive to the interview location – address, special directions to the interview destination or how to enter the building, virtual interview link. The search committee may want to consider also providing information for the candidates to preview, such as:

- Facts on library staffing, collection, budget, circulation, programs, etc.
- Facts on the community such as population, industries, etc.
- Job benefits, hours, probationary period (if applicable)
- Full job description
- Required clearances – If the candidate has copies that have been issued in the current year of hire, excellent. If not, inform candidates if the successful candidate

will be responsible for covering the costs of clearances or if the library will reimburse the candidate upon starting at the library.

☐ Check references of top candidates

These don't have to be long conversations, but it provides the board with insight they may not have received through the application or interview process. Questions to consider might involve what they think about the candidate, if that person would hire the candidate back, and where they think the candidate excels or may need improvements. Record these responses and keep with the candidate's application.

☐ Recommend top candidate(s) to be interviewed by full board (2nd interview)

This provides the whole board with an opportunity to meet the candidates and ask in-depth questions.

☐ Library board determines ranking of candidates

The top choice may not accept the position, so rank the candidates in order of preference. After ranking the candidates based on who might be best suited to manage library operations, consider what the salary package offer would look like for the top candidates in preparation for making offer(s).

☐ Offer position to the top candidate

If the candidate accepts, inform all candidates (individually) that the position has been filled, that the board appreciates the time it took to submit their application (and interview, if applicable), and that the board wishes them luck in their future endeavors. If the 1st candidate declines, follow the ranking and complete as described above.

All applications (interviewed or not) should be kept on file in accordance with the library's record retention policy, typically 3 years.

Part III: Preparing the New Director for Leadership

☐ New employee paperwork

- **PA New Hires Form:** [CLICK HERE FOR PDF](#)
- For more info: [PA Career Link: Report New Hires](#)
- **IRS W-4:** <https://www.irs.gov/pub/irs-pdf/fw4.pdf>
- **Clearances** – see below
- **Direct Deposit** (if applicable)
- **Retirement/Health Benefit Forms** (if applicable)
- **Any other locally required paperwork/forms**

Talk with your accountant or bookkeeper about necessary forms/procedures that may affect your particular library. They are likely to have more up-to-date information.

❑ Clearances

As soon as possible, have the candidate apply for their clearances if they do not have clearances that were issued in the current year of hire. The director cannot start at the library until all clearances are available. Clearances are valid for 60 months. As of 1/1/2020, employers must have valid clearances on file prior to employee's start date.

- PA Access to Criminal History: <https://epatch.state.pa.us/Home.jsp>
- PA Child Abuse History Clearance: <https://www.compass.state.pa.us/cwis/public/home>
- FBI Fingerprinting: <https://www.identogo.com/> (Code for employees: 1KG756)
- Mandated Reporter Training: <https://www.reportabusepa.pitt.edu/>

❑ Welcome Packet

Greet the new director with any information or materials applicable from the "Gather information/materials" section in Part I.

❑ Set-up on-boarding training

Review the job description, evaluation criteria, and expectations with the new hire, so the board and the director start off on the same page.

Work with the District Consultant and previous director (if applicable) to arrange for training opportunities to bring the new director up-to-speed. The District Consultant will also be able to connect the new director to opportunities for new director training through Office of Commonwealth Libraries, Pennsylvania Library Association, and other outlets.

❑ Prepare and implement probationary period evaluation either as a full board or through an evaluation committee

Following the probationary period, provide the new director with a tool for self-evaluation, asking for evaluation of performance, goals, and input on where support would be appreciated. Review the response in conjunction with the board's own evaluation of the new director. Review the board's evaluation with the new director and work with the director to establish goals as well as offer insight on supportive resources based on the new director's suggestions.