

# Ottawa Public Library's Talent Plan: Succession and Leadership Planning

Barbara Clubb

City Librarian & CEO, Ottawa Public Library  
Barbara.Clubb@BiblioOttawaLibrary.ca

## Ottawa Public Library: an amalgamated bilingual library

- Pop = 900,000
- Uses = 25M
- Circ = 10.6M
- Visits = 4.7 M
- Branches = 33
- Mobiles = 2
- Area = 2,761 Sq Km
- Nation's capital
- Op Budget \$36M CN
- Staff = 456 FTE
- Board of 14
  - 6 Councillors
  - 8 Citizens
- 8,300 + hours of training/year

## Outline

- The big picture: organizational change and the emergence of succession planning
- Examples of libraries with succession planning in place
- The Ottawa Public Library's Talent Plan Project: Succession and Leadership Planning

## The bigger picture

- Libraries will experience significant organizational changes in the next 10 years.
- What are we doing to prepare?
- Are we developing staff at every level?
- How do we rate on levels of staff retention and job satisfaction?
- What are we doing to foster development and growth of new generations?



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# Why talent planning in CN libraries?

## Statistics

- The number of Canadians aged 55 to 64 jumped by **28%** in the past 5 years to 3.7 million.
- The numbers of retirement-aged Canadians will continue to increase — in less than 10 years, **1 in 5** people in the workforce will be aged 55 to 64.
- In Canada, almost **50%** of librarians are over the age of 50.
- **25%** are expected to retire by 2009; **48%** by 2014.
- Less than **1 in 10** Canadian libraries currently has some type of succession plan!

**Table J.3 Predicted Future Librarian Supply**

Time Period	Current Librarian Workforce <sup>1</sup>	New Librarian Entrants <sup>2</sup>	Departures from Retirement <sup>3</sup>	Future Librarian Workforce	Future Librarians as % of Current Librarians
In 5 years (2009)	11,700	+1,600	- 1,870	11,430	98%
In 10 years (2014)	11,700	+ 3,250	- 4,560	10,390	89%

The 10-year scenario above is from *The Future of Human Resources in Canadian Libraries* (2005)

Conclusion: “while the short-term supply of librarians is predicted to be very similar to what it is now, the long-term picture is more troubling.”

## Why a talent plan?

- Libraries tend to hire based on skills, not based on roles.
- We tend to focus on professional/technical competencies instead of leadership abilities.
- ???Are we hiring and developing future leaders, future supervisors, or future managers?



## A Tale of Three Libraries

- Multnomah County Library (Oregon, USA)
- Brampton Public Library (Ontario, CAN)
- Ottawa Public Library (Ontario, CAN)



## Multnomah County Library (Portland, OR)

- Analysis of current situation: 42% of their senior management was 55+, and an additional 21% were 50-54.
- 71% of their branch and division managers were over 50.
- Most under 50 were not in public service.
- Of nine assistant department heads, none was under 40; 63% were over 50.

## Multnomah County Library (Portland, OR)

- Potential losses due to retirements: 40% of library managers; 20% of librarians by
- Staff survey: ranked "advancement possibilities" low as a reason to work at the Multnomah County Library
- Issues: a competitive recruiting environment internally; a shortage of new librarians



## Multnomah County Library (Portland, OR)

- Decided to develop their “bench strength”
- Provided developmental opportunities so that current staff are ready to move up
- Managers identified potential successors
- Employee Development and Project Bank Intranet
- New performance management system
- “Lead Worker” @ Central Library program: gave staff an opportunity to experience aspects of a leadership position in their work units
- New soft skills training curriculum developed



## Multnomah County Library (Portland, OR)

### Results:

- 12+ internal promotions in 18 months
- Librarians report seeing “excitement surrounding the competition for promotions”
- Strong internal candidates available for most openings
- Since initial studies, there has been a 50% turnover in the senior management team
- Since initial studies, there has been a 33% turnover of branch heads.

## Brampton Library (Brampton, ON)

- The Mentoring Connection
- BLIS -Brampton Library Information Services Training Initiative  
(In-house library technician training program, in partnership with Mohawk College)
- Manager-In-Training Program
- “A Day Away” Leadership exchange
- Succession Planning

## Brampton Library (Brampton, ON)

### Benefits of the programs

#### Mentoring program:

- Mentors can **nurture** success in other professionals, foster “cycle of support,” **enhance** their own leadership skills
- Mentees receive personal, individualized guidance, have an **easier transition**, **boost self-confidence**
- Fosters **positive morale** and **inclusion** within the organization, and serves as a **model** to others



## Brampton Library (Brampton, ON)

### Benefits of the programs

#### Manager-in-training program:

- Shows participants the organization's commitment to and partnership in their success
- Supports succession planning.
- Increases staff morale and employee retention
- Ensures all areas are covered
- Tailors program to learning style of participant

#### Some challenges

- Quality of training can vary with each coach
- Sometimes difficult to keep programs on track with training while performing other duties.

## Brampton Library (Brampton, ON)

### Benefits of the programs

#### Succession planning program(s):

- Activities are tailored to candidates' needs
- Allows for various opportunities, including temporary assignments, mentoring, team participation and leadership, job shadowing and rotation, and visits to other library systems.





## Brampton Library (Brampton, ON)

### **Overall benefits**

- Better ability to recruit, engage and retain staff
- Horizontal development of staff
- Creates a pool of qualified candidates who are ready to lead in the future
- Lowered recruitment costs
- Aligns library vision and library human resources
- Promotes the library as an “Employer of Choice”

## Why Ottawa PL? Why now?

- *OPL Strategic Plan 2008-2011*
- Common social trends: aging baby boomers, retiring managers and other staff
- Need to build skills and develop knowledge among staff



## We know that

- Province of Ontario has no mandatory retirement age
- 66 people Library workforce (450 FTE's) could retire with non-reduced pension by 2012
- Key categories of risk are: **supervisory**; **librarians**; **public service assistants**; **management**
- Average age a Library employee is eligible to retire with non-reduced pension is 61.5 yrs (for City this is 59 years)
- 27.7% of Library workforce is over 55 (City is 12.9%)
- 48% of managers over age of 55; 3 management retirements to date in 2009; 1 additional departure to University of Ottawa
- Many bargaining unit staff retire, then return as casuals on part-time; only way some units can keep operating

## OPL's strengths as an employer

- Opportunity to work in a vibrant, livable, affordable city.
- Opportunity to work in both official languages.
- Opportunity to work in rural, suburban or urban settings.
- Wide variety of positions and duties.
- Generic job descriptions allow staff to develop broad sets of skills for future use.
- Access to City of Ottawa Learning Centre, among other professional development opportunities.
- University of Ottawa new Master's in Information Studies (MIS) program began in 2009.



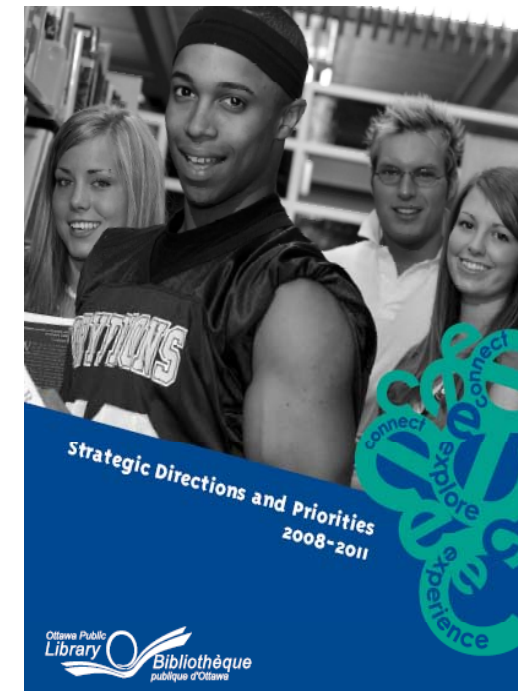
## Some of our challenges

- The library system, like the city, is large and spread-out.
- We have a number of part-time professionals; part-time work may impact commitment to and identification with OPL.
- We face intense competition with other employers in the city (the national capital).
- We need bilingual candidates.
- Some new hires and other librarian staff are not interested in management positions.
- No formal process to identify all those with potential and interest in management and leadership



## *OPL Strategic Directions 2008-2011*

- OPL's values include a dynamic workforce: "We promote a stimulating work environment that recognizes and rewards staff creativity in serving the people of Ottawa."
- Strategic directions identified include being an "accountable and innovative organization."
- To do this, we must "develop our people – ensure effective staff and volunteer development."



## “Developing our people”

*“Across the public sector we see that more and more focus is placed on:*

- *A citizen-focused, citizens-first dynamic*
- *Better and longer-term corporate planning*
- *Processes that focus on outcomes*
- *Better employee satisfaction*
- *Organizational transformation*



## “Developing our People”

*“If we are to meet the needs of the future and ensure the trust and respect of our citizens, we must be an **accountable** and **innovative** organization, that pays attention to **human resource management**, technology development, effective planning, **performance management** and public reporting.*

*Our capacity to move ahead will rest to a large extent on our people – our **staff**, our **managers**, and our **volunteers**.”*



# OPL's Talent Plan Project: Succession and Leadership Planning

- **What:** A plan that outlines how upcoming key vacancies will be filled over both the short and the long term.
- **How:** It identifies, trains and develops staff across the organization.
- **Who:** It is important at all levels and for specialized positions but is essential to developing future leaders.

## OPL was already...



- Revising job descriptions
- Developing a new training policy and plan
- Implementing a new performance appraisal system.
- Recognizing our employees through peer recognition, long-term service and City of Ottawa award, "Bravo" cards, and staff newsletters
- Developing a staff bursary program for those attending library-related university or community college programs
- Had created a policy and procedure to accredit foreign-trained librarians

## OPL was already....

- Benefiting from a new staff development officer at the library
- Recruiting via more intense outreach
- Getting input from our Professional Librarian Development committee (which has a budget to fund development events and training)
- Using our Staff Investment Team (SIT) to develop a framework for a long-term staff investment strategy.
  - Report “Toward a Work Environment that Attracts, Retains and Motivates Committed Employees”
- Getting good marks on staff satisfaction surveys..

## And OPL is already....

- Reviewing management performance every year
- Using a pay for performance program for managers
- Providing some experience opportunities for middle and senior managers

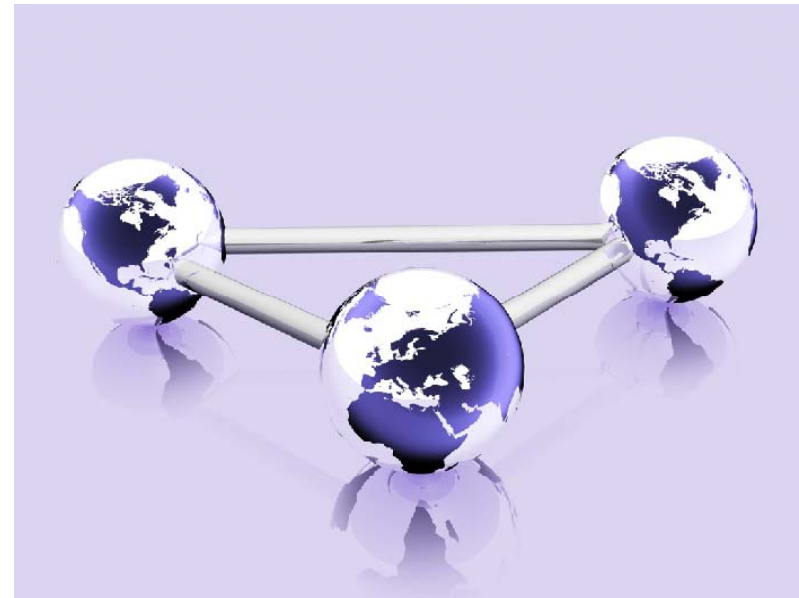
BUT.....more is still needed....

## OPL's Talent Plan Report focuses on...

- Developing the leadership and management skills of current and future management staff
- Developing the knowledge and abilities of key supervisors, team leaders and skilled professionals
- Ensuring that the staff complement is well-trained, multi-skilled, flexible, knowledgeable, and adaptable

OPL's Talent Plan Report also focuses on ensuring that our organizational structure supports:

- Innovation
- Cross-training
- Knowledge transfer
- Communication (across teams, groups and departments)

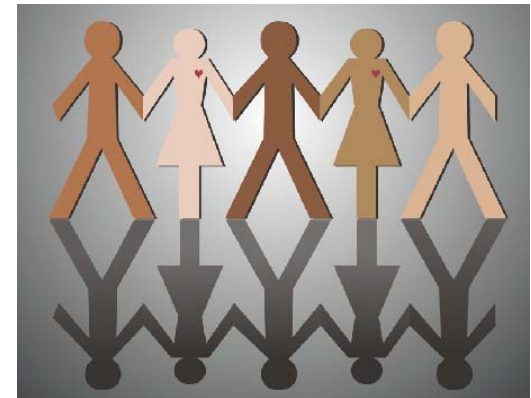


## OPL's Talent Plan: 24 Recommendations

### Group 1. New staff

- Be proactive and have a plan for recruitment.
- Do more to attract and support new Canadians

According to the 8Rs study, *"fewer than 3 in 10 libraries have a formal policy recognizing the credentials of librarians who have graduated from non-North American programs."*



- Develop a more intensive and formal orientation program
- All new librarians get to work in another department/a similar job to their own in another branch/a different area in their home branch during their first three years
- Leverage the "New Librarians' Forum"

## OPL's Talent Plan: Recommendations

### Group 2. Training

- Provide for the formal training and development of leaders and managers
- Establish a formal mentoring program for staff
- Encourage staff to complete formal education programs: information, funding, time
- Leverage formal local library education programs to support OPL



# OPL's Talent Plan: Recommendations

## Group 3. Funding

- Increase funding and opportunities for conferences
- Increase funding and opportunities for secondments
- Increase funding and opportunities for front line staff to have more time for learning, project development and training



## OPL's Talent Plan: Recommendations

### Group 4. Organizational shift

- Target recruitment and hiring practices; be more proactive both internally and externally
- Review OPL's organizational structure: hierarchy, teamwork and broader skill sets
- Identify staff competencies and knowledge gaps and set in place plans to close gaps
- Encourage OPL staff near retirement to take on special projects of interest and value to them and the organization
- Hire for both skills and attitude

## OPL's Talent Plan: Recommendations Group 5. Measure and Communicate

- Communicate goals and components of the Talent Plan
- Monitor progress of individuals and provide feedback
- Measure and communicate progress and success

## Implementation

- April 20, 2009 – Board accepted report
- New employee manual and orientation program completed
- Provincial funding now available for specialized training
- Staff investment team beginning to implement their recommendations (e.g. Mentoring program)
- Bursary support programs expanded
- More exhibition at career fairs: conferences, schools
- Joint professional development committee and new librarians committee integrated

# Implementation

- Strategic Organizational Review initiated
- New style of job postings being implemented
- Library working more closely with local graduate library and technician programs
- First co-op position program being established
- Library taking advantage of new programs at City's learning centre:
  - *Growing Leaders for Service Excellence*
  - *Masters Certificate in Municipal Leadership*

# Implementation

- Seeking strengthened budget for staff training and development in 2010 budget process (with board support)
- Maintaining staff recognition programs including:
  - Peer Awards
  - Bravo E-Cards
  - Long-term service awards
  - Staff newsletters
  - Monthly reports
  - Seeking out external award programs for staff and library
- Multi-year action plan of prioritized recommendations

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## Documentation available

- Presentation up on METLIB
- OPL Talent Plan Report up on METLIB
- *OPL Strategic Directions and Priorities: 2008-2011* up on Library website

[www.biblioottawalibrary.ca](http://www.biblioottawalibrary.ca) in both French and English

- *The Future of Human Resources in Canadian Libraries*, 2005 (8Rs) available online

For further information contact

Barbara Clubb

City Librarian and CEO

[barbara.clubb@bibliooottawalibrary.ca](mailto:barbara.clubb@bibliooottawalibrary.ca)

Ottawa, Ontario, Canada