Ottawa Public Library’s Talent Plan: Succession and Leadership Planning

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

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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!
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.
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.

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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.bibliooottawalibrary.ca](http://www.bibliooottawalibrary.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@bibliottawalibrary.ca

Ottawa, Ontario, Canada