

CHAPTER 8

Succession Planning from the Middle

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Introduction

Succession planning is typically approached as a top-down process, but if you are a middle manager, what can you do to develop your own succession plan in both directions? This question is an important one that is not addressed in scholarly literature about academic institutions more generally, or in the library literature specifically. This chapter will focus on academic libraries, but many of the challenges and solutions apply equally to public, special, and school libraries, and it is the authors' hope that this will prove useful to a variety of readers.

While there is a considerable body of literature addressing succession planning from a business perspective, libraries have attributes and priorities that are inconsistent with those found in businesses with profit-driven approaches. Additionally, academic libraries situated within higher education change at a much slower pace than most businesses. Though leadership structures are present in libraries, the types of positions and levels of management also make it challenging to map concepts directly from the business literature, leaving middle managers in libraries with limited resources when working on succession planning.

Further complicating matters, different types of succession planning are discussed in business literature under a variety of names, including administrative succession planning, technical succession planning, replacement planning, and talent management, among others. All these topics fall under the broad umbrella of succession planning, though they have very different processes and outcomes. The two types of succession planning discussed in this chapter are administrative, which focuses on people, and technical, which focuses on information, with Rothwell and Poduch's definitions used to anchor this



conversation within the broader context of succession planning.¹ (A fuller discussion of these definitions is in the literature review section of this chapter.)

This distinction between types of planning does not mean that one approach should be employed while any other is ignored. Middle managers have a unique viewpoint in this matter, since both types of succession planning discussed here may potentially impact them personally, for their own career advancement; institutionally, when working with upper leadership; and managerially, as they work to ensure continuity of services. However, the perspective of middle managers is frequently overlooked both within the literature and in the implementation of succession plans by administration, which results in confusion for those managers around what role they should have in the process. This chapter will discuss succession planning in libraries from a middle manager's perspective through a literature review and a real-life case study, while offering suggestions for getting started and best practices for middle managers who are ready to jump into succession planning in order to positively impact the future directions of their own careers and those of their supervisees, as well as their institutions.

Problem Definition

The impact of the Great Resignation has yet to be studied in libraries, but it is notable that librarianship has long been a graying profession. Since 2002, American Library Association has been sounding the alarm about librarian shortages, predicting that one in four librarians would be retiring before 2019.² The Bureau of Labor statistics reports that there are 55,000 librarians and media collections specialists as of 2022 aged 55 and older,³ which means that almost 33 percent of librarians are at or nearing retirement age. This is exacerbated by the fact that baby boomers will be reaching retirement as a generation by 2030. The US Census is referring to these upcoming retirements as a “gray tsunami.”⁴ These predictions point to the fact that succession planning is vital to the future of libraries and needs to be better understood and implemented.

Administrative succession planning typically employs a top-down approach by focusing on key leadership positions. This type of succession planning is important to middle managers because it directly impacts the leadership roles in a library and could also impact a middle manager's career advancement if they are interested in positions of increasing authority and responsibility. Middle managers have limited power in what they can do in terms of succession planning moving up the organization chart due to their limited authority, but they can work on administrative succession planning from the middle down. Helping employees explore potential career paths by understanding what those paths are and identifying skills that can be developed by offering them career coaching and professional development opportunities are aspects of succession planning that middle managers can utilize with employees that they supervise. Managers can help guide career path exploration and development through discussions of their own experiences, as well

as potential internal or external promotion opportunities within the library job market. In this way, middle managers have a direct impact on succession planning, even if it is limited to the middle down of the organizational structure.

Instead of focusing on people, technical succession planning focuses on information. The daily operations of a team are vitally important to a middle manager as they think about continuity of services when employees depart or unexpected circumstances arise. These disruptions are intensified by a lack of documentation around vital guidelines and procedures. Middle managers have a vested interest in technical succession planning to ensure that proper documentation and institutional knowledge are captured and passed along. This type of work can be challenging to approach with those employees who take ownership over their work and feel threatened by creating documentation or cross-training others. However, middle managers can help create a culture of documentation so that it becomes part of daily operations, instead of an enormous task that begins only when a person decides to resign or retire. By ensuring that technical succession is part of the daily work of every employee, some fears can be assuaged. Starting with the reasoning behind technical succession planning helps employees understand the end goal and benefits.

While middle managers have a unique perspective on succession planning in libraries, they frequently do not realize the importance of this work or the possibilities of their role in the process. The case study in this chapter will show how the authors dealt with a real-life succession planning failure and what they implemented to prevent disruptions of services and gaps in leadership moving forward.

Literature Review

Literature about succession planning is varied and is found in all types of industries; however, library literature on this topic is sparse according to both Bridgland and Nixon.⁵ Literature written explicitly from the middle management perspective is also absent from the conversation. For the purposes of this chapter, only succession planning literature about libraries will be reviewed, with one exception: *Effective Succession Planning: Ensuring Leadership Continuity and Building Talent from Within*, by Rothwell.⁶ This comprehensive book, now in its fifth edition, is widely accepted as an important starting point for succession planning, regardless of industry or topic.

Rothwell provides an overview of succession planning as a whole, with key context and definitions for the process, as well as how it can be used. For the purposes of the middle manager, there are two important types of succession planning: administrative and technical. Rothwell and Poduch define administrative, or managerial, succession planning as “finding and developing the ‘right people’ to place in the ‘right positions’ and in the ‘right locations’ at the ‘right times’ to achieve the ‘right (because strategically-important) objectives.’ The emphasis is really on who.”⁷ Conversely, technical succession planning is “isolating, distilling and transmitting ‘right information’ to people at the ‘right times’ to

ensure the continuity of operations and provide a foundation for future improvements. The emphasis is really on what—exclusively the implicit and explicit experiences of running a process and/or operation.”⁸ In these definitions there is a clear distinction between a people-focused and an information-focused approach to succession planning, both of which are vital to middle managers and are widely applicable to succession planning regardless of the field. The combination of these types of planning provides a framework for understanding the unique position of the middle manager in ensuring continuity of leadership and services simultaneously.

Existing library literature misses the middle manager’s perspective and focuses on either administrative or technical succession planning without providing targeted guidance for middle managers. Galbraith, Smith and Walker surveyed thirty-four ARL libraries, but asked only questions about deans, assistant or associate university librarians, and heads or chairs, with a focus on the top-down approach to hiring and leadership.⁹ While middle management positions were included in this survey, the focus was on how they were promoted within libraries and not about their role in the process. Goldman conducted a thematic analysis of interviews with six library deans in organizations with flat structures, also highlighting the top-down approach.¹⁰ Chute wrote an overview of six case studies where Institute of Museum and Libraries grants were used to specifically address succession planning through case studies,¹¹ and Murray wrote about the Cambridge University Library as a case study.¹² Both of these case studies offer practical examples but maintain a focus on administrative succession planning from the top down. Nixon writes about succession planning specifically for business librarians, including attributes of these positions that are unique to this specific subject knowledge.¹³ While some aspects of succession planning are universal, focusing on subject knowledge limits the scope of applicability. These articles identify benefits and challenges in succession planning, but address middle managers only in passing or tangentially rather than centering their role in the process.

While leadership may understand succession planning is important, the actual planning is often not implemented, or not implemented well, according to Galbraith, Smith and Walker’s survey.¹⁴ These challenges stem from a variety of sources. One challenge is the increase of flat structures described in Goldman’s interviews about California State University Libraries, and in Murray’s work.¹⁵ Flat structures limit the ability to implement administrative succession planning because they reduce or eliminate middle managers, meaning that those who could be promoted never get a chance to develop the needed skills. The lack of mid-career librarians in the pipeline exacerbates challenges as well according to both Nixon and Murray, as there are not enough people to fill the coming vacancies.¹⁶ The lack of leadership competencies to steer development of employees is specifically noted by Chute as a challenge to implementing succession planning, because managers may not know what their employees need to learn in order to be successful in future leadership roles.¹⁷ All of these challenges make it increasingly difficult to successfully implement administrative succession plans.

Weare takes a different approach from other articles written about succession planning in libraries by arguing against the process and its value as a whole, as opposed to identifying challenges that need to be met.¹⁸ Weare examines articles that review changes in position announcements to ground his argument. He includes four recommendations based on this analysis: focusing on mentorship, assessing the climate of the library, evaluating the organizational structure with each vacancy rather than perpetuating an outdated system, and hiring for leadership outside of the organization in order to bring in new perspectives. Weare focuses on the fact that there is scarce literature that is critical of succession planning, but there is also not evidence that it is effective when implemented. While Weare does make some concessions in limited circumstances—notably that technical succession planning can have value—he also argues that this type of planning is not a vital aspect of continuity of services because “there is some possibility that time, energy, and money would be invested in assuring transfer of knowledge in an area where that knowledge may no longer be needed in the future.”¹⁹ These criticisms are valid, but discount the view of the middle manager who is charged with keeping services running when employees depart with little to no documentation or knowledge transfer. Middle managers need a more practical approach with regard to continuity of services because they must think about services that need to work tomorrow while also thinking about high-level changes in the future.

Hiring is an important aspect of succession planning, as well as management more generally, and hiring an internal candidate can be a challenge for a variety of reasons beyond the stagnant structural concerns identified by Weare. Concerns about hiring internally include the capabilities and qualifications of external talent according to Murray.²⁰ In addition, Galbraith, Smith and Walker identified, using direct quotes from survey respondents, that in many cases internal hires simply do not apply for leadership positions.²¹ They pointed out the positive aspects that internal hires have, including starting out with institutional knowledge and a reduced need for onboarding when internal candidates do choose to apply. In the end Galbraith, Smith, and Walker and Bridgland recommend a mixture of both internal and external hires in order to build the best possible institution with a mix of institutional knowledge and outside perspective.²²

Challenges to technical succession planning are in the literature, but since there is not as much literature on this type of planning, the topic has not been explored extensively. Siewert and Louderback investigated the impact of knowledge transfer, tacit knowledge, and institutional knowledge as characteristics of technical succession planning.²³ They conducted a survey on the state of succession planning in libraries, which showed that libraries have a significant portion of long-term employees who are nearing retirement. This article also identifies the differences between explicit and tacit knowledge, two aspects of technical succession planning in terms of documentation and institutional knowledge, noting that only “18% of respondents feel that their institution provides ‘enough’ written procedures to do their work.”²⁴ They outlined the challenges involved in capturing tacit

knowledge. This article is a great first step in justifying the need for succession planning, but the issues involved with implementation and best practices are listed only as future directions for research.

The scholars cited in this chapter identify similar sequences to begin implementing succession plans. These generally include assessing the state of succession planning; identifying key individuals or positions; and offering mentorship, professional development, and interim chances to build skills with an eye toward competencies established for future leadership roles. These steps are largely built around the administrative leadership model but can be applied to technical succession planning if the development of people is replaced with the development of documentation and information. Middle managers can take the existing literature as a jumping-off point as they balance the needs of leadership with the need for continuity of services.

Discussion

The authors' experience with the streaming media reserves service at the University of Maryland Libraries provides a useful case study in what can happen if succession planning is ignored. In this instance, the transfer of streaming media reserves staff from a separate unit at a different library branch is examined to identify what happened and what should have happened. This transfer of services and collections occurred rapidly and was made more challenging as long-term employees departed.

The University of Maryland, College Park, (UMD) is the state's flagship university, with over 40,000 students in 100 undergraduate and master's programs, as well as eighty doctoral programs. The UMD Libraries have eight branches that provide course reserves to an average of 300 courses per semester through hard-copy and textbook reserves, electronic (text-based) reserves, and streaming media reserves. The course reserve service is located in the Resource Sharing and Reserves (RSR) unit, housed in the McKeldin Library, the main library on campus. RSR has ten FTE staff members, 4.5 of whom are primarily dedicated to course reserves.

In the summer of 2019, the UMD media collection was moved from another branch to McKeldin, and the Library Media Services (LMS) unit was disbanded. The media librarian who had run the unit retired and was not replaced, and the staff were distributed across other units. The streaming media reserves service, which had previously been run separately from the rest of course reserves, and the staff members (1.5 FTE) who had worked on it, were moved into RSR. With these changes, the largely undocumented institutional knowledge about media was dispersed across the UMD Libraries or lost to the institution entirely.

By the end of 2019, the long-term staff member who ran the streaming media reserves service departed the UMD Libraries, and it quickly became clear that technical succession planning had not been a priority for this unit in its previous incarnation. Minimal

documentation and limited institutional knowledge were captured. In addition, LMS utilized a single-expert staffing model, where in many cases only one person answered questions or handled problems for a service, and there was no plan for continuity during absences or emergencies. Limited documentation exacerbated these issues because there was nothing available to refer to without the presence of the single expert. In the definition above, technical succession planning consists of ensuring continuity of services through a focus on information, but this type of planning had not occurred. Since no documentation was captured prior to the employee who ran the streaming media reserves service announcing a resignation, what ensued was a frantic notice period whereas much information was captured as possible. During this time, two weeks of training for remaining RSR staff occurred, which was not enough to effectively cross-train on a complex process. Working with the long-term employee, who was departing as sweeping changes were made to the procedures, was also challenging. The employee was deeply invested in the service, but the way in which it had functioned would not be sustainable for RSR in the future. As a result, the entire request process and workflow changed. The documentation that was captured was enough to maintain the service, albeit with frequent disruptions. The experience was challenging for the remaining RSR employees, who were unsure what they were doing, and instructors, who were used to a different model of service.

In contrast with streaming media, and as a long-standing best practice, RSR has routinely engaged in technical succession planning. Each employee has an area of expertise and specialization, but all employees share general knowledge (used during RSR on-call hours) and are cross-trained to provide support to each other during particularly busy times and as coverage for absences. This cross-training happens over time and allows for many opportunities to practice. Extensive and frequently updated documentation for all procedures is kept on a wiki. Due to the complicated nature of the work in the RSR unit, the wiki is a living tool that is constantly referred to and updated in order to maintain consistency of services. In addition, this practice addresses both prongs of succession planning—while focusing on information sharing and cross-training ensures the continuity of services, the practice also facilitates administrative succession planning by giving employees interested in career advancement a broader knowledge base. The transfer of streaming media reserves into RSR made it clear that LMS had not engaged in similar practices.

Further, with the arrival of the COVID-19 pandemic in early 2020, the UMD Libraries shifted suddenly to an entirely remote model, followed by an extended period of mostly remote operations, where only a few staff members were working in person, generally at staggered times. This also meant reshuffling job duties to accommodate which employees were on-site and which were remote, a task that was particularly onerous for streaming media reserves due to the lack of prior cross-training. The university as a whole remained remote during this time, which increased the demand for streaming media reserves. This demand was challenging to meet, as limited staff were on-site, and those on-site had

no previous experience with streaming media reserves. The onset of the pandemic also prompted university budget cuts and a hiring freeze, meaning that hiring a new single expert for streaming media reserves was impossible, even if doing so would be desirable.

Despite these difficulties, the RSR team remained committed to providing the best services possible under the circumstances. In the absence of existing documentation for the streaming media reserves procedures, new documentation was created and added to the RSR wiki, starting with the information captured during the previous employee's notice period. As workflows and policies were updated to accommodate the new circumstances, those updates were also recorded in the interest of avoiding a similar situation in the future. This content remains a part of the wiki and is periodically reviewed. Creating and updating documentation is a key aspect of technical succession planning as it is the capture of the explicit information needed to maintain continuity of services when an employee departs suddenly.

During the remote period, some of the other services RSR normally offers were suspended or decreased in volume (particularly those related to hard-copy materials), and so a general reshuffling of duties and additional training allowed for the streaming media service to be maintained. When the hiring freeze was eventually lifted, a new employee was hired for a position specializing in streaming media, but with cross-training across RSR. This employee has worked to keep the wiki current with any changes. While there is once again an employee focused specifically on streaming media reserves, the position and the person holding it are now integrated with the rest of RSR. Cross-training continues to ensure that a baseline of knowledge is available to all members of the unit. This cross-training helps assist with continuity of services, but also with the capture of tacit knowledge that can be obtained only through experience. Employees who are cross-trained have an opportunity to learn a service, including its procedures and workflows, in order to better understand the overall process in case support is needed.

Supervisors in the RSR unit also work on administrative succession planning from their positions as middle managers. In order to do this, supervisors focus on ensuring that employees have opportunities and support for professional development. These come in the form of cross-training to expand individuals' skill sets, assistance in obtaining funding for professional development when needed, and ensuring that employees have time to participate in these opportunities. The three supervisors in the unit also coach employees on career path options by sharing information about their own path and potential alternate tracks.

As part of the streaming media reserves integration, RSR was structurally reorganized. At the beginning of the reorganization, reserves consisted of the streaming coordinator, a reserves supervisor, and two specialists. When the streaming coordinator departed, the reserves supervisor was promoted to coordinator and a streaming specialist was added. This restructuring allowed for better overall integration of the service into course reserves, but also added a professional step, creating a career path that could, theoretically, lead from

specialist to coordinator to head of the unit, with skills that could be scaffolded across these positions. Education could be obtained along the way.

Conclusions

In terms of administrative succession planning, there are some advantages, some challenges, and some specific actions that can be taken by middle managers. Supporting employees and helping them develop for future career advancement can be an advantage in multiple ways, especially when there are opportunities for internal promotions. For one thing, this support and development can help boost morale as it shows that a manager and an institution are invested in employees' success. Internal promotions, like the promotion of the reserves supervisor to the reserves coordinator in RSR, allow for institutional knowledge to be leveraged, meaning that employees who are promoted internally start in a new position with a firm basis of knowledge about the institution, library, and patron population.

In the case of streaming media reserves at the UMD Libraries, the departure of the long-term streaming media employee from the university caused a loss of institutional knowledge that was extremely disruptive to instructors who expected services to operate as they did previously. If that employee had been retained (even in a new capacity), or had someone else been prepared to take over streaming media reserves, this disruption would have been significantly diminished. A major argument against succession planning is that the employees who have benefitted from this kind of support may choose to depart; however, there is an overall benefit to the profession as individuals are mentored, developed, and supported. After all, the entry-level staff of today are often the library leaders of tomorrow.

The main challenge of a middle manager when it comes to administrative succession planning is the limited control they have over hiring and budget processes. While they can face these challenges by advocating for employees, they are not typically the final decision-makers. A best practice for administrative succession planning is to determine areas where middle managers can provide impact through identifying development opportunities, as well as advocating for funding and release time for employees.

From the middle manager perspective, a best practice is to talk with employees about their career aspirations in order to identify competencies that can be developed. From there, individualized plans can be created in partnership with the employee, to include things like the aforementioned professional development, but also cross-training and opportunities for employees to participate in cross-functional teams so that they can grow their knowledge base and get chances to build skills in ways that they might not be able to in the day-to-day functions of their job. In the case of RSR, these practices have led to an engaged and enthusiastic team, with employees who understand their work in the larger context and feel empowered to suggest new ideas and improvements. These types of

opportunities for employees to grow their knowledge base and build skills should always be voluntary, with decisions based on the employee's goals.

While middle managers must find ways to approach administrative succession planning indirectly due to their limited power and influence, technical succession planning can be directly employed in order to maintain continuity of services. Technical succession planning is crucial for middle managers in order to ensure that, as employees leave, services can continue, which is evident in the case study presented. One of the ways to engage with technical succession planning is through documentation. Each middle manager, depending on the area they are responsible for, should determine what type of documentation is needed for their team, how to capture it, and how to maintain it. This could be anything from text to screenshots to video tutorials. Wikis are generally a best practice for documentation as they can be easily updated by a variety of people and help the documentation remain current. Almost as important as creating the documentation in the first place is the need to establish a culture of ongoing documentation maintenance, where employees are actively engaged in keeping it updated and consistent. If documentation is not updated frequently, it can quickly become useless.

One of the advantages of having a culture of documentation is that it helps get employee buy-in, which can be a challenging part of this process. Some employees find writing down how they do their jobs stressful. They may be concerned that managers want to force them out or replace them. Employees may feel ownership over their tasks, and the idea of training someone else, or cross-training someone else, can cause anxiety. By focusing on creating a culture of documentation through making it a part of every employee's job duties, some of these fears can be assuaged.

Initially approaching employees with the reasoning behind the documentation is important: ensuring continuity of services before someone moves on with little to no notice is essential to capture their wealth of knowledge. While this is a primary motivation for ensuring documentation is up to date and employees are cross-trained, another big benefit of technical succession planning is that employees can take leave without their job duties going undone (or being done poorly). When they return from leave, they will not return to an unreasonable backlog of work. Cross-training also ensures that there are others around to help during periods of high volume or during times when individuals are engaging in professional development.

Change is an inevitable part of life and libraries, whether that comes from departures, retirements, vacations, or pandemics. However, that does not mean that the disruptions and stress that change causes cannot be minimized. By keeping the broader picture at the forefront and being mindful about both administrative and technical succession planning, middle managers can help ensure that their units are well equipped to handle whatever comes their way.

Notes

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