

Succession Planning Worksheet

Complete this worksheet prior to meeting with your supervisor to develop your individual plan. Refer to the attached example.

Date:	
Position:	

If this position were to become vacant, it would most likely be filled

- ☐ Internally
- ☐ Externally
- ☐ Would not be filled

The goal of this plan is to (check all that apply):

- ☐ Prepare current staff for promotion
- ☐ Prepare to train a newly hired or promoted employee
- ☐ Cover critical tasks in the short-term
- ☐ Prepare to recruit for this position
- ☐ Other:

Critical tasks: List tasks for which you are responsible that are critical to the functioning of the District:

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

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Potential strategies:

Check all strategies would be appropriate for this position. See *Matching Strategies to Risks*.

	Create training programs that prepare current employees for promotion through technical and leadership training.
	Encourage employees to take advantage of opportunities to advance their education.
	Create opportunities for employees to gain experience through more challenging assignments.
	Cross-train employees in critical skills and give them experience by rotating work or making temporary assignments
	Capture knowledge of experienced employees and design a training program to transfer knowledge.
	Create promotional paths that allow you to hire employees with the basic skills/attributes and promote them as they demonstrate additional competencies
	Be ready to recruit. Update recruitment materials. Know what knowledge, skills and abilities you need in new hires. Prepare effective testing materials.
	Plan to overlap exiting employee with the new employee for several months to allow time for training
	Improve on-boarding processes so new employees are effective faster.
	Improve and automate processes to make them easier to document and train
	Document and test work process through Standard Operating Procedures, process maps, desk manuals, etc.
	Create inter-agency agreements for emergency back-up of critical functions
	Use a contractor or consultant to cover key tasks
	Other:

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Action Plan: Describe the goal for this plan and any redundancy and back-up for the position that is already in place.

Because this position would most likely be _____, the action plan focuses on _____.

The main back-up for all tasks is currently _____. (Add other relevant information about the position, back-up needs, planned separations or other risks.)

Complete for each critical task (in order of priority).

Critical task	Action (be specific)	Affected employee(s)	By when?

Organizational Support needed. List support you would need from outside your immediate work area in order to implement your plan.