SUCCESSION PLANNING WORKSHEET

Job Title: _______________________
Department: _____________________
Date of this revision: ______________

1. Position for which this document pertains: _______________________

2. Name of incumbent: ____________________________

3. If the incumbent is temporarily unable to do this job due to illness, injury, or some of reason, the person who could perform the essential duties of this job currently with no additional skill development is: ______________________________.

4. The length of time that person could do his or her job and these additional duties are: _______ days/months.

5. If the incumbent left or became permanently incapacitated, what is the current plan for succession:

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

6. What is the long term plan for succession in this position:

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

7. If any employees have expressed an interest in preparing for this position, please list their names: ____________________________________________________________________.

8. Please list any specific actions taken to prepare these candidates for this position:

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

9. Competencies needed to perform this job (in addition to the ones listed in the job description) include:

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
10. Please identify skill gaps these potential successors have and current strategies being used or that could be used to close these gaps:
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

11. Other considerations and/or assumptions:

12. In the event of the unexpected and untimely death of _________________, the following plan is implemented:

13. A search committee is formed/not formed in the event of the employee’s succession event. Otherwise, the Human Resources Director/ __________ will follow standard operating policies and procedures.

14. For senior staff positions, press releases are written and key stakeholders are notified.
   a. _________________ will speak with staff or N/A
   b. _________________ will write press releases or N/A
   c. _________________ will handle press inquiries or N/A
   d. _________________ will notify stakeholders including or N/A:

15. In the event that notice is given, a search committee is formed for the employee’s succession. Otherwise, the Human Resources Director/ __________ follows standard operating policies and procedures.

16. The following assumptions will be made:

17. Other comments: