**Employee Succession Management - Worksheet**

This tool is intended to help develop employee succession planning actions, including prioritizing those positions with high/medium impact of vacancy and high/medium risk of vacancy occurring. This is a living document that is best updated on an annual basis and reviewed and used as a reference on the following occasions: a new employee is hired, an employee is promoted, an employee is leaving or has left the organization, a new position is created, and/or strategic planning is occurring.

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| **Current Information** | | **Vacancy Impact/Risk** | | **Short-term plan** | **Longer-term planning and development** |
| **Role** | **Current Person** | **Impact of Vacancy (Low/Med/High)** | **Risk of Vacancy (Low/Med/High)** | **If current person wins the Lottery** | **Development & Transition Steps** |
| Executive Director | Mary Smith | High | Low – just signed new 2 year contract | Emergency Board Meeting to review current priorities and appoint interim ED and/or delegate responsibilities | Work with ED on a plan to implement in case of her short or long-term absence. Consider identifying a current team member to shadow the ED in key responsibilities to equip him/her to provide support in the case of an unanticipated absence. With the help of the PDO Identify potential consultants who may assist in the short term. |
| Admin Assistant |  |  |  |  |  |
| Program Manager |  |  |  |  |  |
| Etc. |  |  |  |  |  |
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