

# Environmental Scan Worksheet



The organization's strategic plan is a great place to start in identifying current and future challenges. If the organization doesn't have a strategic plan, an environmental scan can provide enough information to start the succession planning process.

Participants:

Date:

*What is happening inside and outside of the organization:*

Right now?

In the next  
year?

In the next  
3 to 5  
years?

# Critical Position Worksheet



Review positions to determine which are key; consider positions that call for a unique skillset, can be difficult to recruit for, or have a high turnover rate. Evaluate their impact in achieving strategic goals and objectives, vacancy risk and their marketability.



Assess a position's impact against a prioritized list of the organization's mission and strategic objectives.



Assess a position's vacancy risk against factors such as the current employee's retirement eligibility, marketability, etc.

Position title:

Position status:      Filled                  Vacant

Impact:                  High                  Medium                  Low

Vacancy risk:                  High                  Medium                  Low

# Critical Success Factor Worksheet

GOOD IDEA



Identify the specific abilities, skills and organizational knowledge that are critical success factors for each position that should have a succession plan.

Position title:

Education:

Work  
experience:

Key skills and technical competencies:

- |                                  |   |
|----------------------------------|---|
| Communication                    | Project management                              |
| Strategic planning               | Financial literacy (budget & fiscal management) |
| Relationship building            | Bilingualism (oral & written)                   |
| Focus                            | Policy development & analysis                   |
| Community knowledge              | Human resources management                      |
| Valuing diversity                | Legal compliance                                |
| Managing change                  | Information systems & technology (IT)           |
| Development & coaching of others | Program development                             |
| Autonomy                         | Data analysis                                   |
| Leadership                       | Grant writing & contract management             |

Other skills:

Unique organizational knowledge or relationships

What unique organizational knowledge or relationships are important to the success of this position?

Does anyone else in the organization have this knowledge? Who?

How critical is it that this knowledge is documented and shared?      High      Medium      Low

Plan for sharing knowledge:

Process documentation

Mentoring

Job shadowing

Other

# High Potential Employee Identification Worksheet



Take an inventory of staff members within the organization that are ready to successfully assume a new role right away or that have the potential to grow into it over time.

Name:

Position title:

Years in current  
role:

Target position:

Target position  
key skills required:

Ready:      Now                  within 1 year                  within 2 years                  within 3 to 5 years

Action plan:

# Employee Development Plan Worksheet



Career development conversations with high potential employees should be focused on closing the gaps in or strengthening their existing skills and abilities.

Name:

Position title:

Supervisor name:

Supervisor title:

Long term goals:

What are your career goals over the next 3 to 5 years?

1.

2.

3.

Short term goals:

What are your career goals for the next year or two (may or may not be the same as your annual performance goals)?

1.

2.

3.

Skills and ability requirements:

What skills or abilities do you need to build to reach your goals?

Skill or ability to be developed	Training activities	Target dates	Associated costs	Results

*This employee development plan provides an opportunity to demonstrate your career potential and is not a guarantee of a promotion. The plan should be evaluated at least every six months and adjusted as needed based on organizational and/or personal priorities.*

Employee signature

Date

Supervisor signature

Date