SUCCESSION PLANNING THAT WORKS
PARTICIPANT HANDOUTS

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CREATING YOUR SUCCESSION PLAN – LEADERSHIP PLANNING QUESTIONNAIRE

1) How many positions do you likely need to fill/hire for this year?

   # of Positions to fill/hire this year: _____________________________

   Tip: Consider planned retirements, historical turnover, organization growth, etc.

2) Ideally, how many positions would you fill with internal candidates?

3) What are your succession planning goals? (Use S.M.A.R.T.I.E. format) Example: To develop at least 2 internal candidates for the Manager role by September of 2022 through a plan created with employee feedback and ensuring equal access to opportunities.

4) How will you give preference to internal candidates, i.e. using “knowledge of the organization’s mission” as a job requirement and hiring rubric evaluation criteria?

5) How will you identify and incorporate individual employee career goals (i.e. giving all employees access to the career development self-assessment tool and having supervisors check-in with them individually about it)?

6) Once you have identified employees based on #4 above, there are many ways to evaluate whether a candidate is a good fit for a future role. One way is to consider the person’s current performance as well as their future growth potential. “Growth potential” is a person’s willingness and ability to develop new skills. Factors to consider about the candidate:

   ✓ Current performance: Performing well in their current position/role
   ✓ Growth potential: Interested in and good at learning new skills
   ✓ Adaptability to change: OK with the inherent uncertainty involved with career development

   Considering this, who are good candidates for your succession plan?

   __________________________________________________________________________________
EMPLOYEE CAREER DEVELOPMENT SELF-ASSESSMENT

Instructions: This is a self-assessment tool for employees to use to reflect on their career goals. Once completed, employees and supervisors meet to discuss the findings and to co-create a career development plan.

1. What are my long-term career goals (5+ years)?

2. What are my short-term career goals (1-5 years), if different from above)?

3. What are the job titles of my desired careers identified in #1 and #2 above?

4. If the job(s) identified in #3 exist in my organization, in reviewing the job description(s), my strengths relative the job description(s) are.....

   My opportunities/challenges related to the job description(s) are.....

   The skills I would need to develop related to the job description(s) include.....

5. What training/coaching/support/resources do I need to achieve my career goals?

6. What support do I need from my supervisor?
EMPLOYEE CAREER DEVELOPMENT PLAN

Instructions: This is a co-created plan developed by the employee and their supervisor. The purpose of the Individual Development Plan is to help the employee and the employee’s supervisor to identify and stay on track with developing skills needed for the employee’s ideal future role.

Employee Name: _______________________________ Date:____________________

Supervisor Name: _____________________________

Employee’s Current Position: ______________  Employee’s Target Position ________________________

<table>
<thead>
<tr>
<th>Skill to Be Developed (From Job Description)</th>
<th>Method of Development (i.e. job shadowing, training, coaching, practice, additional support needed, etc.)</th>
<th>Timeline for Development (Dates, achievement milestones, etc.)</th>
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<tbody>
<tr>
<td>Ex. Learn how to plan and manage events.</td>
<td>Ex. Take online event planning course and job shadow supervisor at next event.</td>
<td>Ex. Complete online course by March 2022&lt;br&gt;Job shadow at XYZ event on April 12, 2022</td>
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CAREER DEVELOPMENT RESOURCES

SKILLS ASSESSMENTS FOR EMPLOYEES

- Career Assessments

GOAL SETTING

- How to Create SMARTIE Goals Worksheet + Resources

EQUITY AND INCLUSION IN CAREER DEVELOPMENT

- Developing a Succession Plan That Supports Diversity
- Equity in Succession Planning
- Implicit Bias Article + Video

LOCAL RESOURCES

- Nonprofit Development Center
- Nonprofit Confluence Group professional development for nonprofit executive directors
- Learning and Resource pages on Sherwood Trust website

STATEWIDE NONPROFIT MEMBERSHIP ORGANIZATIONS

- Washington Nonprofits
- 501 Commons
- Nonprofit Association of Oregon

SUPERVISOR RESOURCES FOR GIVING FEEDBACK TO EMPLOYEES

- Radical Candor – book and blog
- Nonviolent Communication – book and “instruction self-guide”

ADDITIONAL RESOURCES

- 7 Strategies for Creating a Promotion from Within Culture
- Performance Check-In Discussion Checklist for Supervisors