Manager:

Dept:

Date:

**Introduction**

Succession planning four-step process: Agencies need to ASSESS, IDENTIFY, DEVELOP and EVALUATE the workforce. This tool will help you with Step 2: Identify. While all positions are important, some will significantly impact the agency if left vacant. In order to complete this step, you will need to look at the agency as a whole and identify those positions and the competencies necessary.

The purpose of this tool is to help you identify factors and positions that should receive priority in the succession planning process. The categories listed below are examples and may or may not be the best questions to identify critical positions in your organization. Feel free to customize this tool to best help you in this process.

It is a “best practice” in succession planning to identify critical positions in order to focus on efforts and prioritize the allocation of resources. By managing our most critical risks first, we ensure a plan for leadership continuity is in place to sustain the agency’s mission and deliver the expected public services.

**Implications of Current and Future Business Strategy**

As you go through this exercise, think about the following:

1. What internal and external business drivers exist that may affect your mission, strategic goals/objectives, strategies or structure over the next five years?
2. What are the key workforce implications of these changes? What specific occupational groups or positions may be affected? What changes do you foresee in the skill sets or competencies required to perform effectively in your organization?

**Questions to Identify Critical Positions**

1. What positions (below the agency director) are instrumental to delivering the agency’s commitments and stakeholder priorities?

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1. What positions (below the agency director) exert critical influence on achieving operational and strategic goals?

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1. What positions (below the agency director) are essential in meeting legislative, compliance or regulatory requirements?

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1. What positions (below the agency director) are instrumental to health, safety or security?

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