*Title*

**Organization Name**

LOGO

**Fiscal Years xxxx - xxxx**

# A Message From [executive staff]

Message of support from executive staff. Consider communicating:

* Importance of the succession plan.
* Summary of the succession management process.
* Which areas contributed to the development of the plan.
* How the plan addresses the organization’s unique challenges.
* How the plan supports the goals and mission
* Highlight one or more initiatives.
* Expectations for organization-wide involvement.
* Responsibility of employees.

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# Introduction

Identify the purpose of the succession plan for your department. Provide a brief introduction to the succession plan and program.

Briefly describe how this version of the succession plan may differ from previous version(s). In particular, what changes have been made to address new or ongoing succession challenges.

# Overview

## Methodology

Identify what drives the succession management effort based on how the succession plan supports and aligns with the organization’s strategic plan, business plan, workforce plan, mission, vision, values and/or guiding principles.

Identify *Individuals and/or division/program areas that were partnered with to solicit input on current and future workforce challenges.*

# [PLAN NAME] Initiatives

[Identify leadership development opportunities that will be developed for the entire workforce if not already taking place and/or included in the organization’s workforce plan].

Provide an introduction of leadership development initiatives for every level of the organization.

For each grouping created, discuss the following:

* Primary role of the group.
* Impact of the group on staff and the organization.
* Summary of the initiatives developed, or that will be developed, for each group.
* Purpose the initiatives serve.
* How the initiatives will help develop the group.

Below is one way the organization can be grouped to cover all classification levels.

## Enterprise-wide

## Staff to Leadership Bridging

## Leaders as Supervisors

## Leaders as Managers

## Leaders as Executives

# Gap Analysis

Discuss the methodology used to determine the current and future gaps between the competencies needed for success in key positions and the candidate pool’s existing competencies.

Display the results of the competency gap analysis.

# [PROGRAM NAME]

## Program Overview

Provide an overview of the organization’s succession program, including:

* A description of initiatives and various program components and which competency gaps they will address.
* An explanation of how initiatives and various program components were determined as the best course of action for the organization.

Key Positions 

Identify the key positions that are the focus of the succession program and the rationale for prioritizing these positions. A key position is a position whose decision-making authority and related responsibilities significantly influence organizational policies, strategic goals, business operations, or mission-critical projects. A key position can be a managerial position or a highly specialized individual contributor position. (e.g., A Director’s Executive Assistant may be deemed a key positon if the incumbent has vast institutional knowledge).

### **Table: Key Position Pipeline**

Provide a snapshot of the key positions and associated pipeline(s) for a high level understanding of the pipeline’s structure and career ladder leading to key positions.

### **Table: Demographics**

Provide high-level demographics of the organization’s leadership, if not already taking place and/or included in the organization’s workforce plan. Tracking these statistics may help inform recruitment and other workforce planning needs.

Competencies

Provide a reference of the organization’s leadership competency model in an appendix.

Table: Top Competencies

Indicate the competencies identified as the most critical for success in the key positions.

Candidate Pool

Identify the candidate pool that are the focus of the succession program and the rationale for selecting the candidate pool.

### Minimum Qualifications

Indicate the minimum qualifications for employees to participate in the succession program, if applicable.

### Application Process

Describe the application process for the candidate pool, if applicable.

### Selection Process

Describe the selection process for the candidate pool, if applicable.

### Leadership Development Plan

Describe the process for evaluating competencies to determine strengths, opportunities for improvement, and overall leadership readiness.

Indicate how the individual development plan will be developed, including who will be involved in the planning process.

# Conclusion

*Identify which division/program will own succession management, and the approach for operationalizing the plan, program, evaluating and creating governance.*

*In this section, consider highlighting:*

* *Qualities and characteristics of your workforce (weaknesses, strengths, unique qualities, etc.)*
* *Impact of proposed strategies to your workforce*
* *Organization’s future commitment to succession management*
* *Call to action*
* *Statement of encouragement to help build momentum*

# Appendices

## Appendix A: Key Position Pipeline Classifications

## Appendix B: Leadership Competency Model

## Appendix C: [PROGRAM NAME] Overview

## Appendix D: Action Plan

# Appendix A: Key Position Pipeline Classifications

*If necessary, for increased understanding, include identification of classifications included in the categories identified in the Key Position Pipeline Table.*

# Appendix B: Leadership Competency Model

*Identify the leadership competencies necessary for leaders in the organization to be successful.*

# Appendix C: [PROGRAM NAME] Overview

*Provide an overview of the program that serves as an at a glance snapshot for all the key elements of the program.*

# Appendix D: Action Plan

This appendix relates to the Initiatives section of the plan.

Outline the initiative, identify who is responsible for coordination and implementation, the date that implementation will be completed, and SMART goals to describe how each initiative will be assessed. The action plan is included as an appendix because it lends itself to continuous updates/change. In this way, you will not have to update the entire plan. (Add rows to the table as needed.)

| Initiative  What is the name of the initiative? | Responsible Person(s)  Who is responsible for overseeing successful implementation of the initiative? | Performance Indicators  How will we know we achieved our goal and what will success look like? | Due Date  When will it be completed? |
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| Program Initiatives | | | |
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| Enterprise-wide Initiatives | | | |
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| Staff to Leadership Initiatives | | | |
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| Leaders as Supervisors Initiatives | | | |
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| Leaders as Managers Initiatives | | | |
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| Leaders as Executives Initiatives | | | |
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Chief Executive Officer Signature Print Name Date

Human Resources Director Signature Print Name Date

# Contact