State of Vermont Workforce Planning Toolkit

Succession Planning Template
Step 1: Key/Critical Positions

Agency/Dept./Division: _____ **Manager:** _____ **Date:** _____ **Year(s) applicable:** _____

Dept/ Division/ Unit	Job Class Title	Other distinction (positions#, description, etc.)	Supervisor	Retirement Eligibility Date	Reason this is key/critical position

Reasons a position may be key/critical:

- Mission: Position is a key contributor to the organizational mission.
- Critical Function: Position performs task critical to vital functions. Leaving it vacant would hinder or prevent success of mission.
- Specialization: Position provides specialized leadership or skills that are difficult to replace.
- Location: Position fills a unique and important capacity at a particular location that would be difficult for another position, or the same position in another location, to take over.
- High Turnover: Position is one in a class or occupational group vulnerable to high turnover.

Include additional pages as needed   *(based on Iowa & other sources)*

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Agency/Dept./Divison: _____ Manager: _____ Date: _____ Years Applicable: _____

Key/Critical Position/Class:		Position Title or Job Class:
Reason position/class is key/critical:		**Retirement Eligibility Date (if applicable):**
External Factors:	**Internal Factors:**	**How position will be used in the future:**

What competencies or skill sets will be required?

Current level of readiness to replace departing staff:

Gaps – competencies or skill sets not possessed by current staff:

Include additional pages as needed for each position or class   *(based on Iowa & other sources)*

Succession Planning Template
Step 3: The Succession Plan

Agency/Dept./Division: _____ **Manager:** _____ **Date:** _____ **Years Applicable:** _____

Key Positions/ Classes	Highest Priority Gaps in skills/competencies	Highest Priority Strategies to address Gaps	Target Complete Date	Person(s) Respon- sible	Required Resources	Status/Progress