

Succession Management Plan (Sample)

Instructions: The employee currently occupying the key position (County Manager, Deputy County Manager, Department Head, Assistant Department Head, or Middle Manager) completes Steps One and Two and distributes to all staff reporting directly to him or her. Each of these staff members then works with their manager to complete an Individualized Learning Plan (Steps Three and Four). Evaluation of the program (Step Five) is reported on the Succession Management Evaluation Form by any upper manager occupying a key position. These Evaluation Forms shall be submitted through the chain of command and ultimately packaged for the County Manager's review.

Step One: Identify a Key Position for Succession: Assistant Director

Step Two: *Identify Competencies, Responsibilities, Duties, Tasks, and Essential Job Functions of this Position. Then list specific examples of how these competencies, functions, etc. are exhibited in this job.*

Competency, Responsibility, Duty, Task, Essential Job Function	Behavioral Examples
Budgeting	Accurate budget preparation, able to justify budget items, able to present budget using precise, and understandable terms
Interacting Appropriately with Elected Officials	Shows understanding of policy, responsive to elected officials' needs
Communication Skills	Uses active listening techniques with individuals and groups; presentations have impact and content is easy to remember.
Time Management	Attends meetings on time; does not overextend schedules
Facilitation Skills	Facilitates meetings that are productive; serves as chair of committees or subcommittees on cross-functional teams that produce quality work
Performance Appraisals	Assesses staff performance in a way that creates positive changes in behavior of staff, can clearly write an appraisal in a timely manner.
Technology Skills	Able to use Word, Excel, and PowerPoint at the intermediate level. Able to use the County system to access information.
Administrative Skills	Handles all administrative assignments related to Pre-Board Meetings and BOS Meetings with accuracy and meets all deadlines related to assignments for these meetings.
Emotional Intelligence	Interacts with people in a way that shows empathy and understanding of diversity

Signature of Key Position Manager

Date

Step Three: *Employee completes an Individualized Learning Plan with the assistance of key manager.*

Step Four: *Employee Assesses Ability by Verifying that he/she has closed developmental gaps with assistance of key manager. This information is also recorded on the Individualized Learning Plan.*

Step Five: *Evaluate Program by monitoring developmental activity in your areas of influence, meeting with your manager to discuss internally filled positions and the success of the employees working in those positions.*