



SUPERVISOR'S SUCCESSION PLANNING CHECKLIST

1. Create Opportunity for Open Dialogue to Support Career Growth with Your Employees

- Schedule bi-weekly one-on-one meetings
- Review the document: [Manager's How To: Assisting Employees with Career Pathing](#)
- Prepare discussion Questions for your meetings that specifically relate to career development
- Encourage employees to input learning goals into their Performance Development document
- Remind employees of the training available to them and encourage them to take part

2. Establish Which Positions are in Most Need of Succession Planning

- Review the positions within your unit
- Determine criticality
- Determine vulnerability
- Create a list identifying which of the positions are at highest risk

3. Develop Eligibility Requirements for the Positions Identified as High Risk

- Review job description and relevant merit criteria
- Interview current and former incumbents of position
- Interview supervisor of position
- Establish minimum requirements for job success
- Create a baseline for assessing potential candidates
- Identify appropriate learning and development opportunities

4. Identify Potential Successors

- Share potential succession opportunity with you team
- List any employees well-suited or interested in the positions by determining:
- Are any Indigenous employees interested in this position?
- If this is a leadership role, have any employees indicated interest in developing that skill?
- Could a more junior employee take developmental steps to fill this position?

5. Plan to Develop Potential Successors

- Review [Workforce Development Framework](#) for opportunities that are aligned with the target position
- Prepare development plan using the [Employee Development Plan](#) and [Template](#)

6. (Re)Evaluate Workforce Needs

- Compare the number of qualified “ready now” candidates to before succession planning started
- Consider the effectiveness of any development plans put in place and note any lessons learned
- Track performance development completions
- Review team performance and contribution to organization overall
- Evaluate turnover rates and employee morale