

Succession Management: Knowledge Transfer and IDP

Completed by: _____

Date: _____

Division: _____

Critical Position Role Title:		Pay Band & Quartile:	
Critical Position Work Title:		Occupational Family:	
Incumbent Name:		Full Retirement Year:	

I. Identify 'Feeder Position' Incumbent: *Complete for each individual or interested candidate identified as a Feeder Position to the Critical Position.*

Reporting Position Number	Pay Band & Quartile	Role Title	Work Title	Incumbent Name	Leadership Level <i>(Support, Professional, Lead, Supervisory, Management)</i>	Ready to move into your role now? <i>(Yes / No)</i>	Full Retirement Year	Time to develop the incumbent to step into your role: <i><1 year (<1) 1-3 years (1-3) Not qualified (NQ)</i>

II. Assess 'Feeder Position' Incumbent against Critical Position Essential Responsibilities: *Assess the incumbent's ability to perform the Critical Position's Essential Responsibilities (Extracted from the Critical Position's EWP).*
This is Not Cross Training: Focus on Aspects of the Responsibilities that are: 1) challenging to bring someone up to speed; and 2) a rare commodity.
NOTE: Participation in this process does not guarantee advancement nor is it automatic. The goal is to equip you with skills needed to make you competitive in the recruitment process.

Feeder Incumbent's Assessment Level: CP <i>(Can Perform)</i> NQ <i>(Not Qualified)</i> <1 <i>(Trainable Short Term)</i> 1-3 <i>(Trainable Longer Term)</i>	Responsibility #1:	Responsibility #2:	Responsibility #3:	Responsibility #4:	Responsibility #5:
	<i>Include rating and any notes or justifications related to rating</i>				

III. Create an Individual Development Plan: 1) Describe the competencies, duties and tasks needed to prepare the 'Feeder Position' Incumbent to perform the Essential Responsibilities. 2) Determine the preferred Knowledge Transfer Strategy to be used to prepare the incumbent. 3) Take Action: Discuss, Modify and Implement plan with incumbent.				
Knowledge Types & Traits Explicit Knowledge: Formal Process Procedure Standard Operations Technical Tacit Knowledge: Informal Experience Subjective Situational Soft skills Partnership	Responsibility #1 –		Explicit Knowledge Transfer Strategies: Manuals, SOPs, Job Aids, Formal Training, Current Documentation, Lessons Learned Discussions Tacit Knowledge Transfer Strategies: Mentoring, Coaching, Job Shadowing, Expert Interviews, Job Rotation or Enrichment, Challenging/Stretch Assignments	
	1.1) <i>Review Measures of Essential Responsibilities on EWP for detailed breakdown.</i>		Strategy	Target Date
	1.2)			
	1.3)			
	Responsibility #2 –			
	2.1)		Strategy	Target Date
	2.2)			
	2.3)			
	Responsibility #3 –			

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	3.1)	Strategy	Target Date
	3.2)		
	3.3)		
	Responsibility #4 –		
	4.1)	Strategy	Target Date
	4.2)		
	4.3)		
	Responsibility #5 –		
	5.1)	Strategy	Target Date
	5.2)		
	5.3)		

IV. Assess Incumbent Progress (Quarterly):

1) Review Individual Development Plan with 'Feeder' incumbent and discuss each Knowledge Transfer Strategy and Learning Goal.

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2) Quantify progress by Rating 1-5 (1=Little Progress; 2=Some Progress; 3=Mid Progress; 4=Significant Progress; 5=Goal Achieved).**3) Qualify progress by noting Successful Strategies, Training and/or Mentoring Experiences, Job Shadowing, Challenging Assignments, etc.**

Assessment Date	Target Date	Essential Responsibility #	Learning Goal	Rating (1-5)
Notes:				
Assessment Date	Target Date	Essential Responsibility #	Learning Goal	Rating (1-5)
Notes:				
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