

Potential Candidate Development Plan- Suggested Guidelines

The Succession Planning Potential Candidate Competency Development template is used to plan development activities for the highest priority positions in the succession planning strategy. Each potential candidate selected for development should have a development plan created and maintained for the agreed upon period. For some organizations, this may be for one year, some for two, and others for three years or more based on the critical need and difficulty in filling a specific position. The development period may also change due to one or more of the follow:

- Organizational need changes – i.e.: reorganization, etc.
- Potential candidate interest or availability changes
- Competency proficiencies are reached
- Budgetary constraints are incurred which limit the development investment

Template: The position title is placed at the top of the document, and should be consistent with the title used on the Position Competency Profile. The potential candidate's name, work location, reports to, and years of related service information should be added to the form. Any agreements between the initiating leader and the potential candidate, including time commitment, development cost coverage, development period and who will be involved in the development should be included.

Based on the Competency Assessment compiled results, a determination should be made as to one or more competencies to work on. Each competency agreed upon for development should be transposed from the Position Competency Profile to the Competency Development template. One or more actions/activities for development should be decided for each and documented beside the associated competency. A completed by month and year for each development action should also be discussed and documented.

Review: Development of potential candidates for key/critical positions should be a matter of priority. When discussing the development plan, development activities should tie into the development planning part of the regular performance review. It is important to plan and conduct regular meetings with the potential candidate for mentoring purposes and to ensure the development investment is achieving the desired results. It is also important to incorporate an annual assessment and update as part of the annual performance review process, with documentation that is shared with HR. HR may use a summary worksheet to keep track of each position for which there are existing or potential successors. This will provide an institutional perspective