**SUCCESSION PLANNING**

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| **EMPLOYEE INFORMATION** |
| **Position:** | **Date:** |

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| **Consider the following:**  |
| Risk of vacancy occurring (historically high turnover, etc.). | [ ]  Very low[ ]  Low[ ]  Moderate[ ]  High[ ]  Very High[ ]  Unknown |
| Impact on team, organization, and overall function of the clinic. |  [ ] Very low [ ] Low [ ]  Moderate [ ]  High [ ]  Very High [ ]  Unknown |
| Role has potential, or already has, cross-training (other staff also trained in position). | [ ]  Yes[ ]  No[ ]  n/a |
| Key function and associated procedures documented. | [ ]  Yes[ ]  No[ ]  n/a |

**PLAN FOR SHORT-TERM VACANCY**

* Need to reduce hours or services?
* Implement cross-training options?

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**PLAN FOR LONG-TERM VACANCY**

* Hiring fixed-term replacement?
* Promote/lateral shift internal employee temporarily?

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