



## **SUCCESSION PLANNING QUESTIONNAIRE**

This is a template for employees who are planning to resign or retire, in an effort to capture key institutional knowledge and provide leadership feedback prior to their departure. This feedback will help plan for the future and support the department/component during the transition period. The Questionnaire is optional and separate from the exit interview process. Please return the completed form to Human Resources.

Employee Name:

Position/Classification:

Department:

### **Section 1: Institutional Knowledge, Knowledge Transfer, and Retention Strategies**

1. What are the critical *tasks of your current position*?  
Critical tasks are significant contributions towards promoting success that affect the District's ability to function properly.
  
2. Are all of the key processes and guidelines for this position documented? Do you have a procedures manual for your position? If so, is this procedures manual electronic or hard copy? Who currently has this document? Please explain.
  
3. Have you developed a transition plan for training your co-workers and or existing employees? If yes, describe the scope of the work they will be responsible for in relation to your role.
  
4. Please provide a brief analysis of your department. (Administrators) Examples: strengths, weaknesses, opportunities, and/or challenges.

## **Section 2: Strategic Analysis, Planning, and Recommendations**

5. Given your experience in this position, what key skills and competencies should your successor be required to have?
  
  
  
  
  
  
  
  
  
  
  6. What are your recommendations for handling any challenges that your department might face in the future?
  
  
  
  
  
  
  
  
  
  
  7. Describe the best practices in your role that have worked and should be preserved and sustained?
  
  
  
  
  
  
  
  
  
  
  8. Describe any practices that have not worked in your department that should be avoided in the future?
  
  
  
  
  
  
  
  
  
  
  9. Please outline key deliverables in your role using the time frames below:
    - ☐ Daily
    - ☐ Weekly
    - ☐ Monthly
    - ☐ Quarterly
    - ☐ Yearly
  
  
  
  
  
  
  
  
  
  
  10. List key internal and external partners/contributors that have assisted you in obtaining these deliverables.
-

11. Are there any changes, projects, programs, or implementations that you had desired to champion while in this position that have not yet been completed? Please explain.
  
  
  
  
  
  
  
  
  
  
12. Do you have any other comments/feedback you would like to share about this process?

***Thank you for taking the time to complete this Questionnaire. We appreciate your service and dedication to SRJC and wish you a happy future.***

***You will be missed!***