



Action Guide

Step 1: Identify Critical and Vulnerable Positions

Now it's time to apply Step 1 to your health department to begin the succession planning process.

1. Confirm Your Succession Planning Committee

Identify who will participate in the succession planning process and establish how the committee will work together.

Identify Committee Members

- Identify who will participate in succession planning.
- Confirm roles, such as facilitator, decision-makers, and advisors.
- Review confidentiality expectations and appropriate levels of participation.
- Schedule your first committee meeting.

Establish a Shared Understanding

As a committee, discuss:

- What does **effective succession planning** mean for your organization?
- Metrics you will narrow down and use to evaluate success later (Step 6)

2. Inventory All Positions

Download the Position Inventory document so that you can begin to place your job position inventory into the first sheet of the tracker. We recommend starting with one unit or department (10 or so positions).

- List all positions in your department using the Position Inventory document.
- Include position title, department, and current incumbent.

3. Assess Vulnerability and Criticality

Download the “Identify Critical & Vulnerable Positions” document to identify the criticality of each position using the key below.



For each position, answer:

- How vulnerable is the role to vacancy?
- How critical is the role to service and delivery

Assign each position

- Vulnerability: High / Moderate / Low
- Criticality: High / Moderate / Low

4. Prioritize Positions Using the Risk Matrix

Download the Risk Matrix

Plot Positions on the matrix

Assign succession planning priority level:

- High Risk: Begin succession planning now
- Moderate Risk: Begin within 6-12 months
- Low Risk: Monitor and revisit

5. Create Priority List

Identify roles that require immediate succession planning focus. These roles will move forward to Step 2.