



Action Guide

Step 2: Define Role Requirements

Now it's time to apply Step 2 to your health department by creating a succession planning blueprint.

1. Key Responsibilities for Continuity of Operations

Download the template “Key Responsibilities for Continuity of Operations” and on it list:

- Daily responsibilities and ongoing duties
- Critical projects, deadlines, or cyclical deliverables
- Resources, systems, or tools managed
- Key stakeholders, customers, or collaborators
- Backup assignments if you are unavailable

2. Succession Planning Profile

Download the “Succession Planning Profile Template”

For the same positions, outline the role's success factors:

- Required education, certifications, or licenses
- Work experience needed
- Core competencies (e.g., communication, leadership, problem-solving)
- Technical or functional skills
- Key projects, tasks, or activities
- Additional skills or factors that contribute to success

3. Review and Validate the Documentation

Meet with the staff members currently in the roles to ensure your documentation accurately captures responsibilities, skills, and knowledge.

Include supporting materials like protocols, checklists, or calendars that help a successor transition smoothly.



4. Consider Successor Readiness

Begin thinking about readiness categories for the 9-Box Grid:

- Who could step in now?
- Who could grow into this role with development?
- Who might need more support before being ready?