



Succession Planning Questionnaire

Instructions: How to Use This Questionnaire

The questions below are designed to assist you in identifying contacts, processes and procedures, institutional knowledge, and competencies needed for your position. The knowledge, experience, and competencies should reflect the actual needs of the position, which are not necessarily the knowledge, experience, and competencies you bring to the position. This questionnaire should be updated as needed or a minimum of once a year.

Incumbent Name: _____

Title: _____

Succession Planning Questions

1. Over the next five years, what are/will be the key responsibilities of this position?

2. What key competencies are needed for this position?

3. What expertise and experience are needed for this position?

4. What are the interim key responsibilities to be reassigned until this position is filled?



Multnomah County Oregon

Workforce & Succession Planning Initiative

This Work Matters!

5. What information would have been useful for you to know when you first came into this position?

6. What information have you learned since that would be helpful for others in this position to know?

7. What do you consider to be the most valuable and/or unique knowledge that you hold in your current role? Do you have knowledge that is hard to replace or that no one else has?

8. Who are the people you interact with most frequently (internally and externally)? Is there anyone for whom you are the main or only point of contact?



Multnomah County Oregon

Workforce & Succession Planning Initiative

This Work Matters!

9. Is there any key documentation that you find particularly useful to your role? Are these readily available to others? Procedures, manuals, software, reference materials, websites, newsletters?

10. In your position, what is generally likely to go wrong, and how do you usually respond to or resolve problems? How have you identified and managed potential risks or problems in the past?

11. What mistakes do you think have been made in the past that you think could be avoided in the future?

12. Are there other roles that you perform (officially or unofficially) in the organization?



Multnomah County Oregon

Workforce & Succession Planning Initiative

This Work Matters!

Succession Candidate Development Question

Identify 10 experiences, training courses, or developmental opportunities that would prepare someone to perform your job well.

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
