**Personal Career & Succession Planning Guide**

National Center for Farmworker Health

INTRODUCTION

Nurturing careers is often left to chance, which puts individuals at risk for coincidental career changes and employers at risk for higher levels of turnover than is optimal. Acknowledging that the careers of each of our employees are equally valuable, regardless of their position within the organization, this tool is designed to promote an open dialog and thoughtful planning on the part of employees and their supervisors. It can be used on an “as needed” or on a regularly scheduled basis.

The ***Personal Career, and Succession Planning Tool*** is intended to stimulate self-assessment, goal setting and monitoring, job satisfaction and succession planning either on an individual or an organizational level. Reflection and documentation of key benchmarks in one’s personal life (which are not required to be shared with an employer) sets the stage for career planning around life events such as completion of academic programs, birth of a child, needed care for an aging family member, financial and retirement goals

Suggested usage:

1. Individual/Personal – Career Planning

Individuals are encouraged to explore personal events that sometimes support and other times disrupt career goals.

1. Employee/Employer – Career Planning

Once an employee’s personal training and career goals are on the table, the employer or supervisor is in a much better position to support and provide guidance on experience necessary to achievement of those goals. The size of the organization and opportunities for advancement should be openly discussed.

1. Employee/Employer – Succession Planning

Starting with the CEO and at the Executive level of the organization, and utilized privately with individual members of a team, this tool is intended to facilitate personal reflection and open communication about contingency planning, expectations for advancement, necessary training in order to prepare for potential retirement and/or resignation of team members.

INSTRUCTIONS

We recommend that this tool not be used in conjunction with a regular personnel evaluation, but on an annual basis, in follow up, three to six months later, so as to encourage an open dialog, which is not constrained by potential critique of performance.

1. Select a time frame

Select a time frame for the dialog, which is best suited to the tenure and position of the employee.

1. Select a focus

Select a focus for the purpose of the use of the tool, again best suited to the, tenure and position of the employee. This could include a need for professional development, cross training, setting career goals, assessing staff satisfaction and succession planning.

1. Introduce the dialog

Introduce the dialog by agreeing on a desired focus of the conversation and asking open ended questions that will facilitate what should become an ongoing conversation over an extended period of time.

1. Identify goals

Through discussion, identify not more than 3-5 goals for the time frame selected.

**Note:** It is recommended that the employer set an example by being open about his/her professional goals, and as appropriate to the relationship, about personal goals.

1. Identify career landmark events

Identify landmark events and dates for those events in the career of the employee, and project goals above the time line.

1. Identify personal landmark events

The employee is encouraged to use the space below the time line to document his/her personal landmark events, which do not need to be shared with the employer/supervisor. Taking the time to think about personal landmark events may facilitate setting of career goals.

PERSONAL & PROFESSIONAL CAREER PLANNING TOOL

**Insert Logo Here**

**Name: Title:**

**Date: Time Range:**

**Focus: *CEO Succession Planning***

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| **Historical** |
| **CAREER** |  |  |  |  |  |
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| **NOTES:** |

PERSONAL & PROFESSIONAL CAREER PLANNING TOOL

**Insert Logo Here**

**Name: Title:**

**Date: Time Range:**

**Focus: *CEO Succession Planning***

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| **Current and Projected** |
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| **NOTES:** |

PERSONAL & PROFESSIONAL CAREER PLANNING TOOL

**Name: Title:**

**Insert Logo Here**

**Date: Time Range:**

**Focus: *CEO Succession Planning***

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| **Projected** |
| **CAREER** |  |  |  |  |  |
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| **PERSONAL** |  |  |  |  |  |
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| **NOTES:** |

Worksheet Notes