**Succession plan template**

After considering the benefits of succession planning, identifying what your staff team values, reviewing approaches from other services, and applying the recommendations from this guide, it’s time to document your plan.

**Here is a suggested template to capture key information.**

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| Purpose and objectives | |
| * Define the plan’s purpose and key objectives, like identifying leaders and supporting staff development. |  |
| Roles and responsibilities | |
| * List critical roles (e.g. registered manager, deputy manager). * Outline responsibilities, required skills,   and qualifications. |  |
| Values | |
| * Highlight essential values   (e.g. accountability, compassion, inclusion).   * Assess values in recruitment, training, and reviews to match the organisation’s culture. |  |
| Inclusion | |
| * Ensure leadership roles are accessible to diverse staff. * Track diversity metrics and support   under-represented groups |  |
| Competency framework and skills assessment | |
| * Define core competencies for roles   (e.g. leadership, compliance)   * Assess through evaluations, feedback,   or training modules. |  |

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| Identifying talent | |
| * Set criteria for identifying potential leaders (e.g. performance, motivation). * Use diverse panels in formal recruitment processes. |  |
| Development plans | |
| * Detail available training and development programmes. * Include milestones and timelines for progression. |  |
| Retention and incentives | |
| * Develop strategies to retain staff   post-training.   * Offer career advancement opportunities. |  |
| Knowledge transfer | |
| * Facilitate knowledge transfer from current leaders. * Encourage mentoring by senior staff. |  |
| Review process | |
| * Assess plan effectiveness with metrics   (e.g. retention, leadership diversity).   * Update processes periodically. |  |
| Communication, implementation, monitoring and improvement | |
| * Promote transparency and engagement   through clear communication.     * Set an implementation timeline and ensure   continuous monitoring and improvement. |  |