# Appendix: Sample Project Plan

| **Phases** | **Activities** | **Due Date** | **Responsible** |
| --- | --- | --- | --- |
| **Getting Ready** | Understand what succession planning is and how it can work for your organization.  |  |  |
| View Succession Planning Webinar Series |  |  |
| Gather supporting documents which may include: Center Health Review, Strategic Plan, Workforce Plan, FEVS results |  |  |
| Pull and review Standard Workforce Data Elements<https://www.usgs.gov/about/organization/science-support/human-capital/usgs-workforce-demographics-measures-and-metrics> |  |  |
| Identify leadership sponsor and obtain commitment |  |  |
| Identify succession planning team  |  |  |
| Alignment | Conduct SWOT Analysis using supporting documents and Standard Workforce Data Elements as input |  |  |
| Formulate business case based on SWOT |  |  |
| Estimate budget for succession planning activities |  |  |
| Analysis | Identify key position(s) for succession planning |  |  |
| Identify the talent pool for key position(s) (if talent pool is being determined by management) ***OR*** |  |  |
| Invite employees to be considered as part of talent pool (if talent pool is being determined by employee responses to survey/email invitation to express interest) |  |  |
| Identify competencies for key position(s) |  |  |
| Assess ability, engagement, aspiration, and barriers for key position(s) using the USGS Succession Planning Pipeline Assessment Tool |  |  |
| Evaluate bench strength for key positions based on Assessment Tool results |  |  |
| Strategy | Develop succession planning strategies based on Analysis phase |  |  |
| Develop budget required to implement strategies |  |  |
| Determine which metrics will be used to evaluate succession planning strategies |  |  |
| Implementation | Document Alignment, Analysis, and Strategy Phase into Succession Plan  |  |  |
| Develop Communication Plan  |  |  |
| Implement Communication Plan  |  |  |
| Implement Succession Planning Strategies |  |  |
| Evaluation | Conduct quarterly monitoring based on evaluation metrics |  |  |
| Prepare evaluation report |  |  |
| Make adjustments to program based on evaluation results |  |  |
| Reaffirm leadership commitment |  |  |