

SUCCESSION GUIDEBOOK

MANAGERS' GUIDE TO SUCCESSION PLANNING



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Overview: What is Succession Planning?

Succession Planning is a proactive organizational process that ensures employees are supported with the skills, experiences, and resources needed to grow into roles of greater responsibility. Rather than focusing on specific individuals, it emphasizes creating clear pathways, professional development opportunities, and a culture of readiness so that when higher-level positions become available, a diverse pool of capable employees are prepared to step into them.

What Succession Planning Isn't

It's easy to confuse succession planning with other processes, so it's important to know what it's not.

- **It's not replacement hiring.** Succession planning goes beyond simply filling vacancies as they arise. While replacement hiring addresses an immediate need, succession planning takes a more strategic, forward-looking approach to ensure continuity and readiness for the future.
- **It's not pre-selecting one individual.** The focus is on building a pipeline of talent by identifying a group of qualified candidates and providing the support needed to help them grow and prepare for future leadership roles.

Key Components of the Process

A solid succession plan involves several key steps to make sure it's effective.

- **Talent Identification:** This is all about spotting employees with high potential across the department/team.
- **Skill Gap Analysis:** Figure out what skills are needed for future roles and then compare that to the skills of current employees.
- **Development Pathways:** This is where personalized growth plans for employees are created, including things like training, mentorship, and special projects.
- **Knowledge Transfer:** Put systems in place to make sure that critical information and wisdom from experienced employees get passed on to those who are being developed.

The main goal is to create an organizational culture that values professional growth and is ready for any changes.

Why It Matters: The Strategic Impact

Succession planning has a huge impact on an organization's long-term health and stability.

Reduces Disruption During Transitions:

When a key person leaves or retires, a well-designed succession plan minimizes disruption and maintains efficiency. Individuals identified to step into the role have already been trained, which keeps operations running smoothly. This helps prevent a decline in productivity and reinforces to clients and stakeholders that the organization is stable and resilient.

Retains Institutional Knowledge:

So much of what makes an organization successful is the undocumented, or internal, department knowledge, which are the relationships, processes, and wisdom built up over the years. Succession planning ensures this valuable "organizational memory" by preparing potential successors through mentoring, shadowing, and knowledge transfer, so critical expertise remains within the organization even as people transition out. This continuity protects performance, supports informed decision-making, and keeps core functions stable over time.

Builds a Pipeline of Capable Leaders:

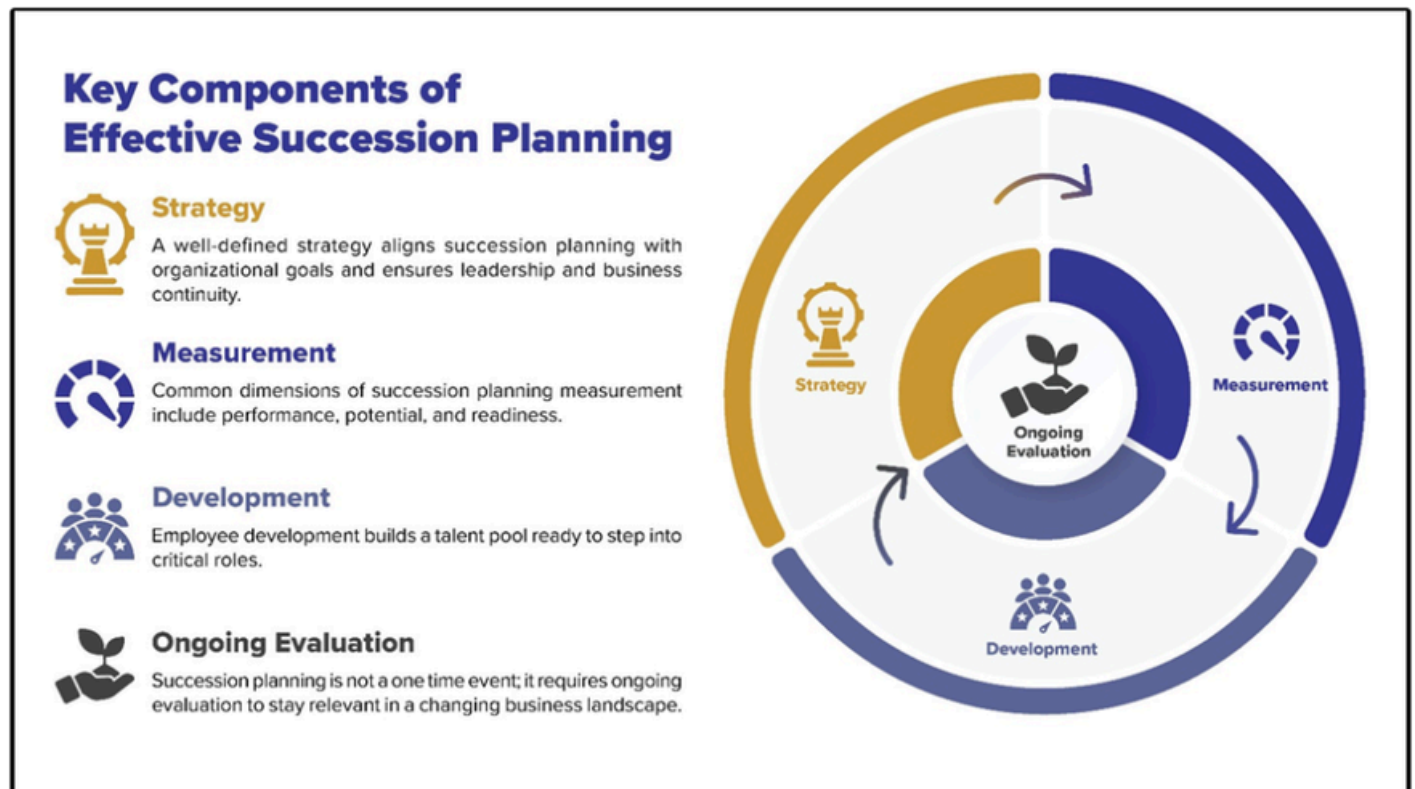
By developing talent internally, it creates a deep bench of leaders who already understand the County's culture and goals. This saves time and money that would otherwise be spent on external recruitment and training.

Supports Employee Growth and Engagement:

When employees see that the County is invested in their career growth and that there's a clear path for advancement, they become more engaged and motivated. This sense of opportunity helps you keep your best people and creates a positive, forward-thinking work environment.

The Phases of Succession Planning

Effective succession planning ensures that organizations are prepared for future leadership needs and business continuity. This process involves four key phases: Strategy, Measurement, Development, and Ongoing Evaluation. Each phase plays a vital role in identifying, preparing, and supporting future leaders. A clear strategy aligns succession goals with organizational objectives, measurement tracks performance and readiness, development builds talent capabilities, and ongoing evaluation ensures continuous improvement in an evolving business landscape. Together, these components create a sustainable framework for long-term organizational success.



Strategy Phase: Laying the Foundation



Before identifying successors or building development plans, it's important to build a strong foundation of understanding to help plan and align with the objectives of your department, and the County. Investing time into the pre-work phase of succession planning creates structure and shared understanding needed for succession planning to be consistent, transparent, and impactful. The pre-work phase of succession planning at the County is made up of the following best practices.

Understand the roles of Key Stakeholders:

- **Executives:** Executives play a critical role in setting the tone and direction for succession planning. They ensure the process is aligned with the County's strategic goals and provide visible support. Executives also identify critical roles within their teams, actively participate in talent reviews, and support the development of high-potential employees by providing mentorship, visibility, and growth opportunities.
- **Managers:** Managers serve as the link between strategy and day-to-day execution. They are responsible for recognizing talent within their teams, assessing readiness, and supporting development efforts. Managers provide valuable insight into employee performance and potential, recommend individuals for succession pipelines, and assign meaningful projects or stretch assignments that build future capabilities. Their ongoing feedback and coaching are essential to preparing employees for advancement.
- **Employees:** Employees also play an active role in succession planning by engaging in their own growth and development. They are encouraged to seek feedback, pursue learning opportunities, and communicate their career goals. By taking ownership of their professional development, employees help ensure they are prepared for future opportunities and demonstrate commitment to the County's mission and long-term success.
- **Human Resources Learning and Organizational Development (L&OD) Division:** Responsible for providing resources and developing tools such as training and workshops, resource documents, and guidebooks around the topic of succession planning that are accessible and easy to understand. L&OD also supports departments by identifying relevant SkillSoft competency-based training aligned with critical roles and development needs, helping prepare employees for future key positions.

Together, the business partners, executives, managers, HR L&OD Division and employees create a shared responsibility for succession planning—ensuring that the County builds a strong leadership pipeline, supports employee growth, and safeguards continuity in their critical roles.

Understand Your Team's Landscape

Who is nearing retirement or at risk of leaving?

Begin by reviewing staff to identify those who may be approaching retirement within the next few years. It is equally important to consider other factors that could impact retention, such as employee engagement levels, expressed career interests, or roles where turnover has historically been higher. Managers are encouraged to have open conversations with employees about career goals and future plans, which can provide valuable insight into potential departures. By anticipating where vacancies may occur, the County can ensure a smooth transition of knowledge and responsibilities, minimizing operational risk. (The Readiness Level Chart is used to identify and track employees who are nearing retirement or may be at risk of leaving critical roles, while also assessing the preparedness of the talent pipeline to step into those roles.)

Which roles are critical to operations or hard to replace?

Not all positions carry the same level of impact on daily operations. Identifying roles that are essential to the County's ability to function effectively is a key step in succession planning. These may include positions with highly specialized expertise, roles that require significant training, certifications or ramp-up time, or leadership positions that oversee core services. When vacancies occur in these roles, the impact on operations, service delivery, and team stability can be significant. By prioritizing succession planning efforts around critical roles, the County ensures that resources are directed where they will have the greatest organizational benefit and long-term value.

Connect to a Competency-Based Approach

Guide succession planning with the County of Riverside's competency framework from Korn Ferry:

By using the competency model as a foundation, the County can assess employees on their current performance and also on their potential to grow into future roles. Competencies highlight the leadership qualities, technical expertise, and interpersonal skills that are most critical for advancing the County's mission. When managers and leaders evaluate talent through the lens of competencies, they can identify gaps, create targeted development plans, and ensure that succession planning decisions are fair, transparent, and aligned with organizational values. This approach also gives employees a clear understanding of what is expected for career growth. To view the RivCo Talent Competency library of resources (competency model and job levels) [Click Here](#).

Why do competencies matter for organizational structure, identifying development needs, and crafting stretch assignments?

Competencies provide the structure that succession planning needs to remain consistent and objective across departments. They act as benchmarks for evaluating employee readiness, ensuring that decisions are based on demonstrated skills and potential rather than subjective impressions. By mapping employees against the County's competency framework, managers can identify specific development needs by pinpointing where an individual may require additional training, coaching, or exposure to new responsibilities. Competencies also serve as a guide for crafting meaningful stretch assignments. These assignments are designed to give employees real-world opportunities to practice and strengthen the skills required for future leadership roles. By aligning stretch opportunities with competency gaps, the County can ensure that development efforts are intentional, targeted, and directly linked to long-term succession goals.

Know the Types of Approaches to Succession Planning

Emergency backups vs. long-term growth planning:

Succession planning requires a balanced approach that addresses both immediate and future needs. In some cases, identifying an emergency backup for a critical or at-risk role is necessary to ensure business continuity in the event of an unexpected departure, with short-term solutions such as interim assignments helping to maintain stability and minimize disruption. At the same time, long-term growth planning focuses on developing employees over time to prepare them for roles with greater responsibility. An effective succession plan integrates both approaches by providing immediate coverage while building a strong and sustainable leadership pipeline.

Position-based:

This approach centers on identifying successors for a specific role. Managers consider which employees have the skills, experience, and potential to step into a particular position when it becomes vacant. Position-based planning provides clarity for critical roles but may risk being too narrow if the focus remains only on replacement rather than broader development. Leaders should also consider the future needs of the organization relative to the position before developing a pipeline; will this position remain important to the organization's strategic goals, or will it become less relevant over time?

Person-based:

A person-based approach starts with preparing high-potential employees for all future roles rather than the position. It emphasizes identifying high-potential employees and designing development opportunities that prepare them for future leadership roles, even if the specific role is not yet determined. This method supports employee engagement and growth while also building organizational flexibility to meet future needs. However, the person-based approach risks being overly broad for organizations which require specialized knowledge, education, or skills in their leadership. This approach can also risk developing individuals for roles which may not be strategically necessary for the future of the organization.

Ensure Alignment with Strategic Goals

Review the County's Organizational Goals:

When the County experiences growth, restructuring, or shifts in service delivery, the skills and leadership required may also change. For example, expansion into new programs may create the need for specialized expertise, while restructuring could open opportunities for employees to take on broader responsibilities. Reviewing organizational goals helps managers anticipate these changes and adjust succession plans accordingly. By connecting workforce planning to strategic objectives, the County ensures it develops leaders who are not only capable of stepping into current roles but also ready to drive the County forward.

Tie succession planning directly to County/Department goals, mission, and workforce planning efforts:

Succession planning should reflect the unique objectives of each department while staying connected to the County's overarching mission and workforce priorities. This alignment ensures that the leaders of tomorrow are prepared to advance the County's strategic vision and maintain service excellence.

Consider how succession planning cycles will connect or align with strategic priorities or budget planning cycles:

Timing is a critical component in succession planning. Aligning the process with strategic planning and budget cycles helps departments better anticipate resource needs, secure funding for employee development opportunities, and plan for leadership transitions in a coordinated manner. The optimal timing for succession planning may vary based on departmental operations, and in some cases, departments may find it more effective to conduct succession planning during specific times of the year. By integrating succession planning into established planning cycles, the County promotes a sustainable and repeatable process that supports leadership continuity, operational stability, and long-term success.

Check for Bias

Be mindful of who gets considered, equity matters:

Managers and leaders should regularly reflect on whether their succession planning decisions are inclusive and based on objective criteria. It is important to ensure that all employees have equal access to development opportunities and that decisions are not driven by familiarity, personal preference, or assumptions about career interest. Using the County's competency framework and structured evaluation tools helps minimize bias and ensures that talent is assessed consistently. By committing to equity in succession planning, the County strengthens its ability to identify a diverse range of leaders who reflect the community it serves.



Measurement Phase:



Department leaders should consider how they will measure the outcomes of succession planning and how potential talent will be assessed throughout the process. During this phase, the department leader will collect data and metrics to establish a baseline between the current state of succession planning and the desired state. Common metrics may include performance, potential, and readiness; however, all measures should be aligned with the organization's strategic goals and future needs identified in the prior Strategy Phase. Consistent measurement ensures succession plans remain relevant, data-driven, and responsive to organizational change.

Manager's Role in Succession Planning

Identify key roles and potential future gaps:

Managers play a critical part in succession planning by proactively assessing their team's structure and the organization's strategic needs. They are responsible for identifying positions that are essential to daily operations and long-term goals, evaluating which roles may become vacant due to retirements, promotions, or organizational growth. Managers should regularly review workforce data, anticipated changes in demand, and employee career trajectories to pinpoint potential talent gaps. By recognizing key roles and forecasting future vacancies, managers help ensure a pipeline of qualified candidates is developed and ready when transitions occur.

Assess team members' performance and growth potential:

Managers are responsible for evaluating both the current performance and future potential of their team members to support effective succession planning. This includes conducting regular performance reviews, gathering feedback from peers and stakeholders, and measuring results against established goals and competencies. In addition to assessing technical skills and achievements, managers should consider leadership abilities, adaptability, and willingness to take on new challenges. By identifying high-performing employees with strong growth potential, managers can create targeted development plans that prepare them for greater responsibilities and future leadership roles.

Maintain open, career-focused conversations:

Managers support succession planning by engaging in regular, transparent discussions with employees about their career interests, goals, and development needs. These conversations create a shared understanding of each employee's aspirations and the skills required for future roles. By providing constructive feedback, outlining potential career paths, and identifying growth opportunities, managers build trust and help employees take an active role in their professional development. Consistent, career-focused dialogue also enables managers to spot emerging talent and align individual ambitions with organizational needs.



Collaborate with Human Resources:

Managers have the option to partner with HR Business Partners and/or L&OD Division. This collaboration ensures alignment between departmental needs and the County's talent strategies. Managers provide insights on key roles, potential skill gaps, and high-potential employees, while HR Business partners can help facilitate meetings with stakeholders, collaborate to propose a program schedule, identify critical positions, and help develop stretch assignments, and HR L&OD can offer expertise in assessment tools, career pathing, and development programs. These collaborations can create actionable plans to build a strong pipeline of future leaders, support employee growth, and ensure business continuity.

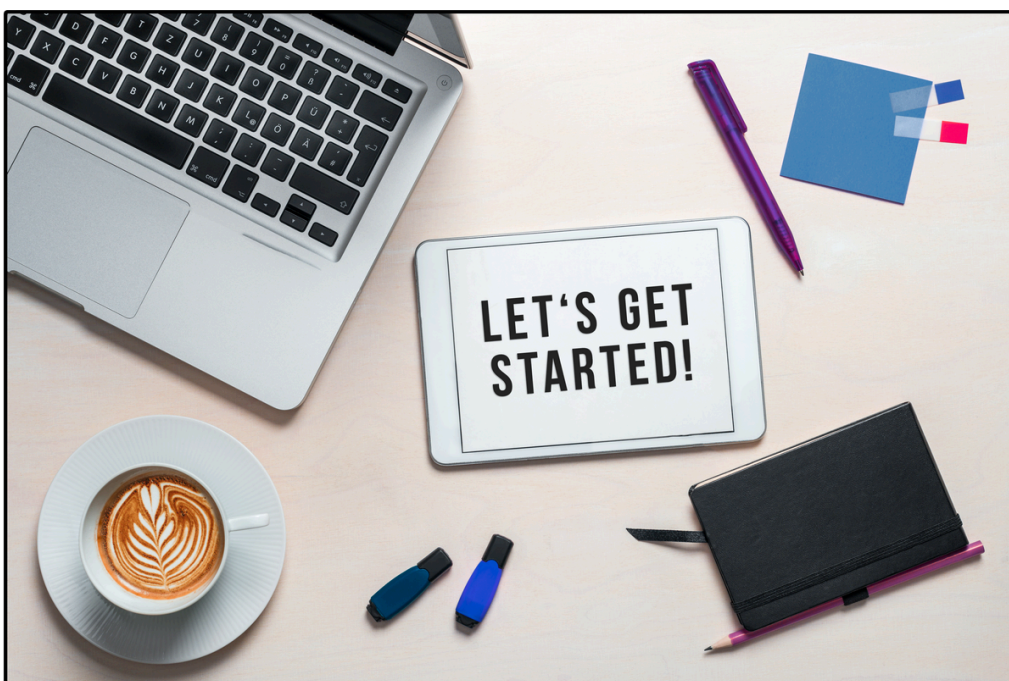
Getting Started: Quick Steps

Identify Critical Roles

Managers/Supervisors need to assess roles by their operational disruption if the role were vacant, and the specialized knowledge or skills required, considering executive, managerial, and non-managerial positions across the organization. Key criteria include high impact on strategy or operations, significant decision-making authority, scarce or unique expertise, and a high risk of talent scarcity. Organizations should involve key stakeholders, such as senior leaders and HR professionals, in defining and applying these criteria to ensure the identification process is thorough and aligned with business goals. To view the Critical Role Identifier Checklist Template click [Here](#).

Key Criteria for Identifying Critical Roles

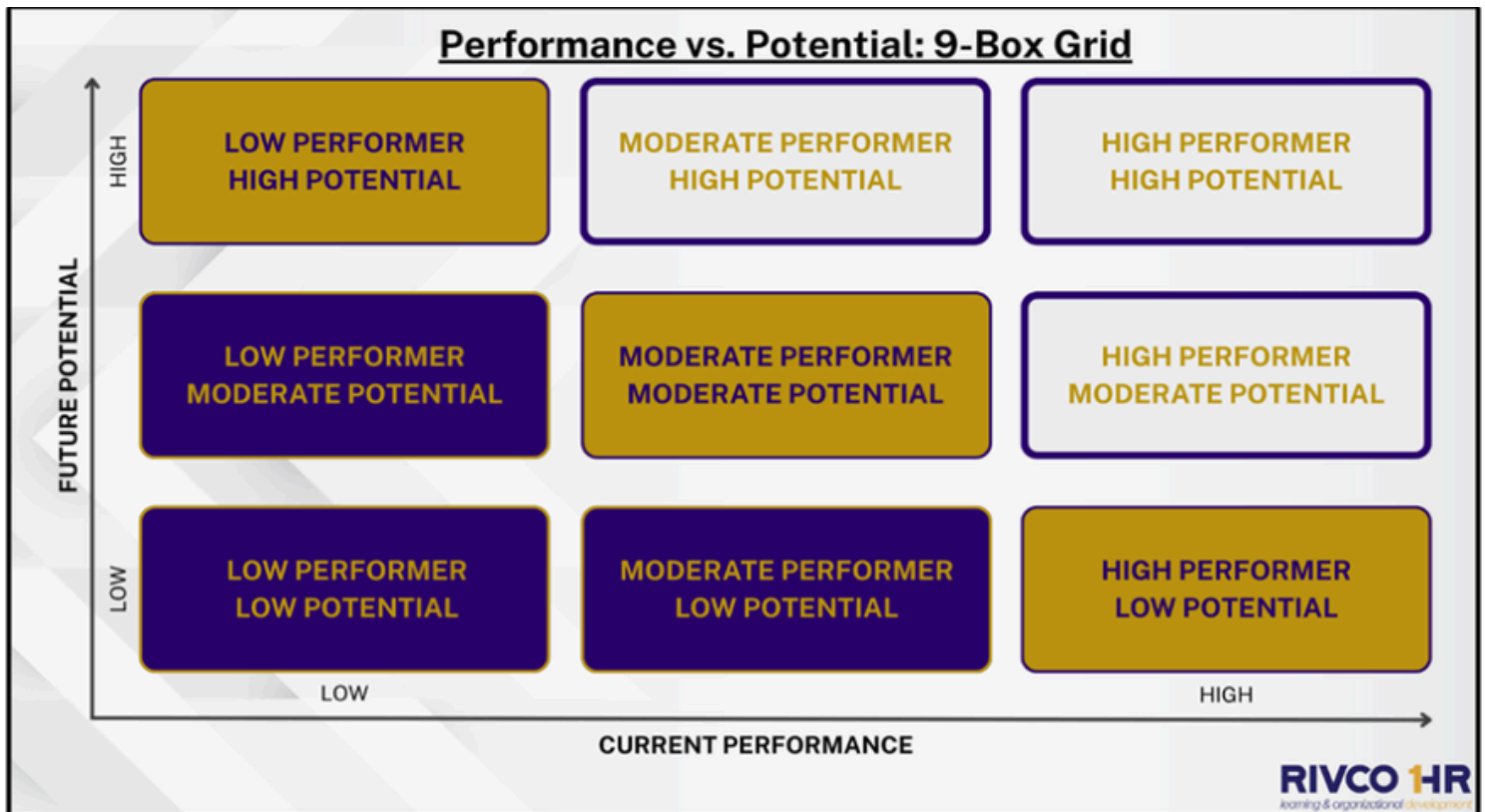
- *Operational Disruption:* Consider positions where a sudden vacancy would cause a substantial, negative impact on day-to-day operations, revenue, or risk management.
- *Specialized Skills & Knowledge:* Pinpoint roles that require unique expertise, a high level of specialized training, or specific certifications that are hard to find externally.
- *Leadership & Decision-Making:* Identify positions with significant leadership responsibilities and the authority to make crucial decisions that drive results.
- *Talent Scarcity:* Look for roles with limited pools of qualified external candidates, especially those with specialized skills or high levels of education or certifications. Focus on hard-to-fill, high-impact, or leadership pipeline positions.



Assess Talent

Use tools like:

- 9-Box Grid: Performance vs. Potential [Performance vs Potential Matrix](#)



- Risk/Readiness Charts: Who's ready now vs. in 1-2 years [Readiness Level Chart](#)

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READINESS LEVEL CHART

KEY POSITION TITLE	INCUMBENT NAME	POSITION VULNERABILITY			POTENTIAL SUCCESSION CANDIDATES		
		OPEN IN < 1 YR	OPEN IN 1 - 3 YRS	OPEN IN 3+ YRS	READY IN < 1 YR	READY IN 1 - 3 YRS	READY IN 3+ YRS
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			



Development Phase:

In the Development Phase, use established goals and metrics from prior phases to develop individualized development plans for identified employees. Establish and implement relevant training programs and opportunities to reach your organization's succession planning goals.

Talk to Your Employees

Open and ongoing communication is key to effective succession planning. Take the time to have intentional conversations with your employees about their career aspirations, interests, and development goals. These discussions help ensure that growth opportunities align with both departmental needs and individual motivations.

Avoid making assumptions about an employee's ambitions based on performance, tenure, or personality. Instead, create a safe space for honest dialogue. Ask open-ended questions such as:

- "What type of work energizes you the most?"
- "Where do you see yourself contributing in the future?"
- "What skills or experience would you like to develop next?"

By engaging in these conversations, managers gain valuable insight into employees' readiness, potential, and desired career paths. This understanding allows for more meaningful development planning and fosters a culture of trust, engagement, and mutual growth.

Create Development Plans

Once you've identified employees' career goals and potential growth areas, work collaboratively to create an individualized development plan. A well-designed plan outlines specific actions, learning experiences, and timelines that support both the employee's career progression and the organization's future talent needs.

Use the RivCo Talent system to assign, document, and track development plans. The system provides tools for managers to:

- Identify skill gaps and align development goals with organizational competencies
- Assign targeted learning opportunities for your employees
- Monitor progress and completion of development activities over time
- Adjust plans as employees grow or business needs evolve

Leveraging RivCo Talent ensures development activities are visible, measurable, and aligned across the organization. Regularly review and update each employee's plan to maintain momentum and ensure continued growth and readiness for future roles.

See the tools and templates section at the end of the guide for training and materials regarding the RivCo Talent Development Plan function and Individualized Development Plan template click [Here](#).



Designing effective developmental assignments

A stretch assignment is a development opportunity that challenges an employee to go beyond their current job responsibilities, helping them build new skills, gain broader experience, and prepare for future roles. These assignments are designed to “stretch” an employee’s capabilities by expanding what they know and can do while still receiving support and guidance from their manager.

Stretch assignments can take many practical forms, such as:

- Leading a project or initiative outside of their usual scope (e.g., coordinating a cross-departmental task force or leading a process improvement effort).
- Cross-training to learn new skills.
- Taking trainings to continue to grow their skillsets in areas of interest or areas they do not get exposed to on a regular basis.
- Serving in an acting or interim role when a manager or team member is on leave, or a position is vacant.
- Representing the department on a County-wide committee, workgroup, or community partnership.
- Facilitating a training session or presenting at a departmental meeting or County learning event.
- Assisting with the development of a new program or policy, offering exposure to strategic planning and collaboration with leadership.
- Mentoring or coaching a new employee or peer to develop leadership and communication skills.

Stretch assignments help employees gain visibility, develop confidence, and demonstrate readiness for greater responsibility. These are all critical components of succession planning and talent development. When developing stretch assignments, departments should exercise caution and collaborate with their assigned Human Resources Business Partner to ensure assignments are appropriate and compliant with applicable labor agreements.

HR LOD has programs to promote cross-training throughout your department, for more information please reach out to the HR LOD Inbox here: HRLOD@Rivco.org.

Link assignments to competencies

When creating development plans, it’s important to align each learning activity or stretch assignment with the previously identified competencies an employee needs to strengthen for future roles. Competencies represent the skills, behaviors, and knowledge required for success in key positions, and focusing development efforts on these areas ensures growth is both targeted and meaningful.

Managers can use tools such as performance evaluations, development plans in RivCo Talent, Individualized Development Plans template, and 1:1 meeting discussions to identify skill gaps. Once these areas are clear, select development opportunities, such as courses, mentoring, cross-training, or project work that directly address those gaps.

By intentionally linking assignments to competencies, managers help employees build the right capabilities for advancement, while also supporting the department’s long-term talent readiness and leadership pipeline.





Ongoing Evaluation Phase:

Succession Planning requires ongoing evaluation to stay current with organizational requirements and employee development needs. Similar to the performance management process, succession planning should be revisited regularly and adjusted to adapt and stay relevant for the organization.

Evaluation and Follow-up

Effective succession planning doesn't end with the creation of development plans—it requires ongoing evaluation and follow-up to ensure progress, accountability, and results. Regular monitoring helps departments assess how well employees are advancing toward their development goals and whether the organization's talent pipeline is strengthening over time.

Monitoring & Evaluation:

- Departments should establish clear methods for tracking and measuring progress. Regular check-ins between managers and employees are essential to review development activities, identify obstacles, and adjust plans as needed. These conversations also reinforce engagement and commitment to growth.

Manager/Supervisor check-in frequency:

- Career goal Check-ins: Quarterly (or more frequently, as needed) to discuss progress and adjust plans. These check-ins can coincide with regularly scheduled 1:1 meetings but should be differentiated from current work responsibilities to focus on development.
- Succession Plan Review: Annually, to evaluate overall succession progress, identify new priorities, and update development strategies.

Consistent monitoring and evaluation ensure that succession planning remains a living, adaptive process—one that evolves alongside organizational needs and supports long-term leadership continuity.



Best Practices & Tips

Start Small – Prioritize 1-2 Roles or Individuals

- Begin with a focused approach by identifying one or two critical roles or key individuals to develop. Starting small allows you to refine the process, build confidence, and demonstrate early success before expanding.

Focus on Development, Not Promotions

- Succession planning is about building capability, not guaranteeing advancement. Emphasize growth opportunities that prepare employees for future roles rather than immediate promotion.

Revisit Plans Regularly (Annually at Minimum)

- Review and update succession and development plans at least once a year to ensure they remain relevant. Organizational priorities, employee goals, and readiness levels can shift over time.

Make It Inclusive – Look at All Levels and Backgrounds

- Consider talent from diverse departments, job levels, and backgrounds. Inclusive succession planning broadens your talent pipeline and promotes equitable access to development opportunities.

Keep It Simple and Practical

- Design a process that is easy to understand and implement. Simple, actionable steps encourage participation, consistency, and sustained engagement across the organization.



Tools & Templates

- [Succession Planning Snapshot Tool: Simple Succession Planning Template](#)

Simple Succession Planning Template

Instructions:
 1. Determine the specific job title, current position holder, and the timeline for succession planning.
 2. List key competencies required for the role, identify potential succession candidates, and rate their readiness.
 3. Outline a development plan for candidates, set performance metrics and KPIs, and establish a monitoring process.

Position for succession	Current position holder	Succession planning timeline	Key competencies	Succession candidates	Readiness rating	Succession development plan	Performance metrics and KPIs	Type of performance monitoring	Emergency contact
The specific position or job title the succession plan is intended for.	The person currently occupying the role covered by the succession plan.	The timeline for identifying, assessing and preparing candidates for the position.	The essential skills and qualifications needed for the position.	Individuals who may be strong candidates for the position	A rating system (0-10) to assess each candidate's readiness for the role, considering factors like qualifications, experience, skills, current performance, & development plan.	The steps to be implemented to develop the candidates' skills and prepare them for the position.	Key metrics that define success in the role and guide development planning for potential successors.	The process for tracking candidates' progress, and offering feedback and coaching as necessary.	The designated contact person or group for emergencies.

- Individual Development Plan (IDP) Template: [Individual Development Plan Template](#)

Professional Development Plan Template

Employee Name	<input type="text"/>	Job Title	<input type="text"/>
Department	<input type="text"/>	Direct Supervisor	<input type="text"/>
Start Date	<input type="text"/>	Review Date	<input type="text"/>


Personal goals to achieve
 What are your desired career advancement goals for the next 12 months?

Skill development
 Identify the specific skills or knowledge areas to develop in order to achieve the goals

Goal	Skills

Action plan
 Outline activities that are going to help achieve professional goals

Goal	Action Plan



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- RivCo Talent Development Plans Tutorial: [Click Here](#)
- RivCo Talent Development Plans 2-Page Document: [Click Here](#)



**QUICK REFERENCE GUIDE:
CREATING A DEVELOPMENT PLAN IN
RIVCO TALENT**

Creating A Development Plan

Development Plan Tools, Tips, and Tricks

- Utilize the Development Wizard to create plans based on competencies or aspirational jobs. For more information on the development wizard, please refer to the Development Plan Tutorial available on SumTotal, coming soon!
- Add objectives to organize tasks. Create a title and link tasks and learning for easy access for employee and manager.
- Add a "Library Task" by linking to the Learning Management library to access hundreds of learning activities for the development plan or create an "Other Task" and enter in any outside training that will be useful to your team or an individual employee.
- If you are a manager, you can go to the "My Team" tab -> Development -> My Team Development Plans. Here you can create development plans for your whole team instead of adding tasks individually.

Create a Development Plan

The Development Plan provides an interface where employees and their managers can identify and manage any activities the employee should complete to close any gaps between current capabilities and those of a current or a future position.

Users can group activities, enabling employees to understand how they are developing, and to target the activities that are most important to their career goals. Key metrics and summaries help users understand how much they have progressed toward their development goals. Special planning tools allow managers and administrators to manage Development Plans for their team or anyone in the organization, respectively - including mass activity assignment, and plan review and approval.

To start a Development Plan, follow the steps outlined below:

- Using the "Self" Menu at the top of the screen, navigate down to Development -> My Development Plan
- Click "Add Task"
- Select "Library Task" from drop-down menu.
- Utilize the search bar to add an activity. Click the "Search" button next to the "Select Activity" bar.
- Enter in the name of the activity you would like to add to your Development Plan.
- Select the title of the activity.
- Back on the "Add Library Task" screen, select the Plan Period this activity applies to. (Optional)
- Enter Start and End dates for this activity. (Optional)
- Select an objective to associate the activity to from the Objective drop-down menu. (Optional)
- Click "Save" at the bottom of the screen.

Instructor-led activities in the system are any activities, classes, or courses that are scheduled and led by a facilitator or trainer. For any instructor-led activities in the library (Example: Disciplinary Process), you must register for an offering. Select the activity under Tasks, then click the kebab menu under Actions. Or you can access this by going into your development plan under Tasks: All and click the 3 dots under Actions and you can start or register for the course. Note: most eCourses and Skillsoft content do not require registration.

- RivCo Talent Development Wizard Tutorial: [Click Here](#)
- RivCo Talent Development Plan Smart Wizard 1-Page Document: [Click Here](#)

Utilize the Development Plan Smart Wizard

You can use the Development Wizard to help you determine which competencies you need to improve in and assign activities to help you improve in those areas.

- From your "My Development Plan", select the Plan Period whose details you want to update.
- Click "Development Wizard" and choose from the following options:
 - Develop for a current position: Develop for a position you currently hold.
 - Select the position for which you want to develop from the menu.
 - Pick from all competencies: Develop for competencies you select.
 - Develop for an aspirational job: Develop for a specific job.
 - You will enter the job classification in the Search bar, once you see the classification you wish to develop towards you will click ok to get it added.
- Complete an on-demand assessment of the competencies in the selected position or job competency model. If you had selected to pick from all competencies, the assessment includes all competencies in the system. Please note: if your employee does not have a completed evaluation you will need to assess your employees current proficiency level from 0-5 with 5 being highly proficient.
- A "Reviewing Strengths and Weaknesses" screen appears. Use this screen to analyze your performance against competencies and select which to include in the development action plan.
- Select each competency to include in the development action plan. Click "Next."
- Select tasks to assign. Below each competency is a list of development activities that are applicable to the competency, including suggested learning activities, goals, readings, and more. There is improved formatting on this page as competencies you selected in Step 3 are organized in Step 4 as clickable headings. You can now select the heading to see activities related to that specific competency, rather than having one long list of all the activities. If a competency was selected that is associated with a learning activity, a learning activity link is suggested under "Suggested Learning Activities." Clicking on the learning activity link displays a course summary.
- Click "Finish."

Read more about the Development Plan Smart Wizard by accessing the [Performance Management guidebook](#).

Still have questions? Reach out to the Performance Management Team at PerformanceMgmt@rivco.org.

- Critical Role Identification Template - [Critical Role Identification Template](#)

Critical Role Identification Template

This template helps you identify your organization's most critical roles. In the first column, list the roles you wish to assess. In the following columns, you'll find sample indicators of role criticality. You can add additional criteria in the fourth column or modify the existing criteria by simply overwriting the text. If an indicator accurately reflects the role you're evaluating, click the box, and it will automatically insert a checkmark. Upon completion, the visual representation will reveal which roles are the most critical.

	Strategic Impact	Vacancy Risk	Value Creation	
List the roles you want to evaluate	Role disproportionately impacts the County's ability to achieve its strategic objectives.	A vacancy in the role would cause significant disruption in delivering on County priorities.	Role creates disproportionate value for the County.	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Critical Role Risk Template

This template will help you obtain directional insights on the level of risk exposure in your critical roles. **For critical roles you list in column 1**, respond to the four risk statements in the additional columns by putting a checkmark in the box if you agree with the statement. Upon completion, **the visual will show you where the greatest risks exist (i.e., empty boxes indicate high risk)**. Use the findings to inform actions for reducing risk.

	Incumbent Risk	Internal Bench Risk	Development Risk	External Talent Risk
List your critical roles - those that disproportionately impact the County's ability to deliver its strategy	There is low risk of the incumbent leaving the role in the near future.	The internal talent pipeline for backfilling this role is relatively strong.	Internal talent can be developed for this role within reasonable time and cost.	Hiring external talent for this role can be done within reasonable time and cost.
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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