



Succession Planning Toolkit

MORAVIAN

TRUSTEES





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<RXU GHSDUWPHQW¶V VWUDWHJLF SODQ LV D JUHDW SODFH WR V
\RXU GHSDUWPHQW GRHVQ¶W KDYH D VWUDWHJLF SODQ RU LW LV
VWUDWHJLHV DQG SULRULWLHV DQ HQYLURQPHQWDO VFDQ FDQ
VXFFHVVLRQ SODQQLQJ SURFHVV

(QYLURQPHQWDO 6FDQ :RUNV

(QYLURQPHQWDO VFDQV FDQ EH FRQGXFWHG GXULQJ DEUDLQVWRUP
WKURXJK VXUYH\LQJ RU WDONLQJ ZLWK VWDNHKROGHUV RUE\D FRP

3DUWLFLSDQWV

'DWH

:KDW¶V KDSSHQLQJ LQVLGH DQG RXWVLGH \RXU RUJDQLJDWLRO

5LJKW QRZ"

,Q WKHQHDXV

,Q WKH GLVWDQ

6 W H S G I [j Q N s E] Z d I j I [E Q I h • h X Q Y Y h • < [(X [] q Y I G O I j P < j < g I E g Q j Q E < Y h k E E E

\$ I W H U \ R X G H W H U P L Q H Z K L F K S R V L W L R Q V D U H P L V V L R Q F U L W L F F R P S H W H Q F L H V V N L O O V D Q G L Q V W L W X W L R Q D O N Q R Z O H G J H W H U H T X L U H V D V X F F H V V L R Q S O D Q

& U L W L F D O 6 X F F H V V) D F W R U : R

0 R U D Y R E Q 7 L W O H

6 \ V W - H R E 7 L W O H

(G X F D S W L R Q U H P H Q W V
G H J U F H W L I L F D J L R \$ @ D

6 W H S][h Q G I g P Q O P d]j I [j Q < Y I Z d Y]s I I h

\$IWHU \RX KDYH HYDOXDWHG ZKLFK SRVLWLRQV UHTXLUH D VXFF
DUH FXUUHQW VWDII PHPEHUV UHDG\ WR VXFFHVVIXOO\ DVVXPH

:RUNLQJ ZLWK +XPDQ 5HVRXUFHV GHWHUPLQH ZKLFK VWDII PH
ZLWKLQ \H DUV IRU SULRULWL]HG SRVLWLRQV

, I \RX DUH FRQGXFWLQJ WKLV VXFFHVVLRQ SODQQHQJ H[HUFLVH
HPSOR\HHV DUH RIWHQ QRW GLVWULEXWHG HYHQO\ ZLWKLQ DQ F
FRQYHUVDWLRQV DQG UHPHEHU WKDW MXVW EHFDXVH DQ LQGL
PHDQ WKDW WKH\ DUH QRW D VWURQJ LQGLYLGXDO FRQWULEXW
GHYHORSPHQW DFWLYLWLHV

+ L J K 3 R W H Q W L D O (P S O R \ H H , G H

1DPH
0RUDYLDQ -RE 7LWOH

'HSDUWPHQW
<H DUV LQ &XUUHQW 3RVLWLRQ
&XUUHQW 6XSHUYLVRU
7DUJHW 3RVLWLRQ

7DUJHW 3RVLWLRQ .H\ &RPSHWHQFLHV

5HDG\ 1RZ :LWKLQ <H DU :LWKLQ <H DUV :LWKLQ
? 4 upev inbeT

6 W H \$ I Y I E j j P I E] Z d I j I [E Q I h Q [G Q p Q G k <
h k E E I h h N k Y Q [d] h Q j Q] [h < [G j] Z I I j
D k h Q [I h h E P < Y Y I [O I h

3 U H S D U L Q J D Q L Q G L Y L G X D O W R S U R J U H V V D W 0 R U D Y L D Q L V Q R W
F R P E L Q D W L R Q R I I R U P D O W U D L Q L Q J W K R X J K W I X O F R D F K L Q J W
D Q G H [H F X W L Y H O H D G H U V K L S S O D \ D N H \ U R O H L Q F U H D W L Q J D F F
S U R Y L G L Q J I H H G E D F N D O R Q J W K H Z D \

0 D Q D J H U V V K R X O G E H K D Y L Q J R Q J R L Q J F D U H H U G H Y H O R S P H Q W
W K H L U D Q Q X D O S H U I R U P D Q F H U H Y L H Z V & D U H H U G H Y H O R S P H Q W
V K R X O G E H I R F X V H G R Q F O R V L Q J W K H J D S V D Q G R U V W U H Q J W K H

& D U H H U ' H Y H O R S P H Q W 3 O D Q : R

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0 R U D Y L D Q - R E 7 L W O H

' H S D U W P H Q W
& X U U H Q W 6 X S H U Y L V R U
6 X S H U Y L V R U 7 L W O H

Long-Term Goals:

: K D W D U H \ R X U O R Q J W H U P F D U H H U J R D O V R Y H U W K H Q H [W \ H D U V " '
S U L R U L W L H V R I \ R X U G H S D U W P H Q W

* R D O

* R D O

* R D O

& R Q W L (

Career Development Plan Worksheet



What Do You Want to Strengthen?

Career Development Cheatsheet

**Organizational
Wherewithal**

**Hy cross ! functional committe
workž δV rotationž and δV
shadowing**

**Position-Specific
Expertise**

Investigate:

**Professional Certifications
Relevant Courses
Conferences
Journal Subscriptions
Research Projects
Self-Study**

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