

Small Water Supply Succession Planning Strategy

1. Current Operations Personnel

Complete the table for the one or more staff members or contract operators.

	Name #1	Name #2	Name #3
Title/Position			
# of Hours / Week			
Key Functions & Knowledge Areas			
Education			
Experience			
Certifications/Licenses			
Time until Retirement			

2. System Personnel Needs

Does the current personnel roster meet the needs of the system in terms of compliance with state and federal regulatory requirements and additional service levels the system has established? If yes, go on to Section 3. If no, list three next steps that would be required to meet the current needs.

1. Step #1

- 2. Step #2
- 3. Step #3

Do you anticipate that the personnel needs, in terms of quantity of staff, salary levels or training requirements, will change in the future? If yes, list what additional funding or support would be required to meet those changed needs.

3. Succession Plan

Complete the table for each key personnel position, making sure to focus on how an individual's key functions and knowledge areas will be transferred.

	Position #1	Position #2	Position #3
Current Personnel Name			
Future Personnel Name (if known)			
Anticipated Date of Transition			
Baseline Requirements to Assume Position			
Specific Actions to Hand Down Knowledge through Written Documentation			
Specific Plans to Hand Down Knowledge through One-on-One Training			