



**GIBBS & OLSON**

## Self Evaluation to Prepare for Succession Plan Meeting

### Achievements

- What are your most important achievements and contributions to the team and the company?
- What accomplishments and achievements are you the most proud of?
- What goals do you wish you had accomplished, but did not?
- What would have helped you accomplish these goals?
- In what other major projects and initiatives did you participate?
- What traits have helped you succeed in your career?
- Are there other traits that you feel would be beneficial for your successor to have or develop?

### Goals

- What job-related goals would you like to accomplish for yourself during this evaluation period?
- How can your supervisor help you to accomplish these job related goals?
- What additional support can this organization provide so that you are able to accomplish these goals?
- What can you do to achieve these goals?

### Professional Development

- Do you have an estimate of when you'd like to retire, step down, or otherwise change your job description?
- Is there an identified successor(s) for your position?
- What professional job or career information do you hope to pass on within three years?
- What shorter term goals can you achieve that will help you toward your longer term goals?
- What resources and support can this organization provide so that you can accomplish these professional job or career goals?
- What other resources can you find to achieve these goals?
- What professional and personal goals will help improve or develop another team member's performance in your current job?
- What additional support can this organization provide so that you are able to accomplish these goals?

### Job Components (review your job description)

- Identify any components of the job description that you no longer do or that now take extra time.
- What work are you performing that is outside the scope of your current job description? Identify that which requires additional decision making, responsibility, accountability, or oversight of the work of other employees.
- Identify what you like most about your current job.
- Identify the components of your job that you would like to change or eliminate. Why?