



# Succession Planning Toolkit



THE UNIVERSITY OF BRITISH COLUMBIA

Experiential Learning Hub  
Faculty of Applied Science

[EXPERIENCE.APSC.UBC.CA](http://EXPERIENCE.APSC.UBC.CA)

**BEFORE YOU BEGIN**

# Leadership and Succession Planning

Succession planning is key to ensuring the longevity of your team. It helps you to pass down important information, reflect on the progress made, and prepare for the future. While proactive measures (e.g. project documentation and member check-ins) throughout the year are a big part this, we'll focus on what you can do as the year winds down and your team begins preparing for the next year.

## Turnover Documentation & Feedback

One way to ensure knowledge is passed down and feedback is collected is to have your members fill out an end-of-year reflection. The templates on the following pages can help you get started.

TEMPLATE

# End of the Year Reflection

NAME:

TEAM ROLE:

EMAIL:

## Year Overview

What were biggest the highlights, achievements, or learning experiences of your year?

Have you faced or observed any challenges on the team this year?

Were the challenges resolved? If not, do you have any ideas for how to approach these challenges?

Was your experience on the team this year what you expected it would be (e.g. in terms of project work or team culture)?

# Project [repeat for each project you've worked on]

Brief background of project (e.g. goals, constraints, timeline)

Design history and key decisions.

What is the status of the project? Are there next steps?

## CONTACTS AND/OR RESOURCES USED

| NAME | CONTACT INFORMATION | NOTES |
|------|---------------------|-------|
|      |                     |       |

## IMPORTANT FILES

| FILE NAME | FILE TYPE | DESCRIPTION | FILE LOCATION |
|-----------|-----------|-------------|---------------|
|           |           |             |               |

# The Future

Where would you like to see the team in one year? What about in four years?

Are there specific projects or skills you would specifically like to work on?

Do you have any other questions, concerns, or feedback?

# Resources

## Still have questions?

You can book an advising appointment with Minoli Navaratnam ([minoli.navaratnam@ubc.ca](mailto:minoli.navaratnam@ubc.ca)) in APSC Professional Development. We can:

- Review your worksheet.
- Discuss any other questions you may have.



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