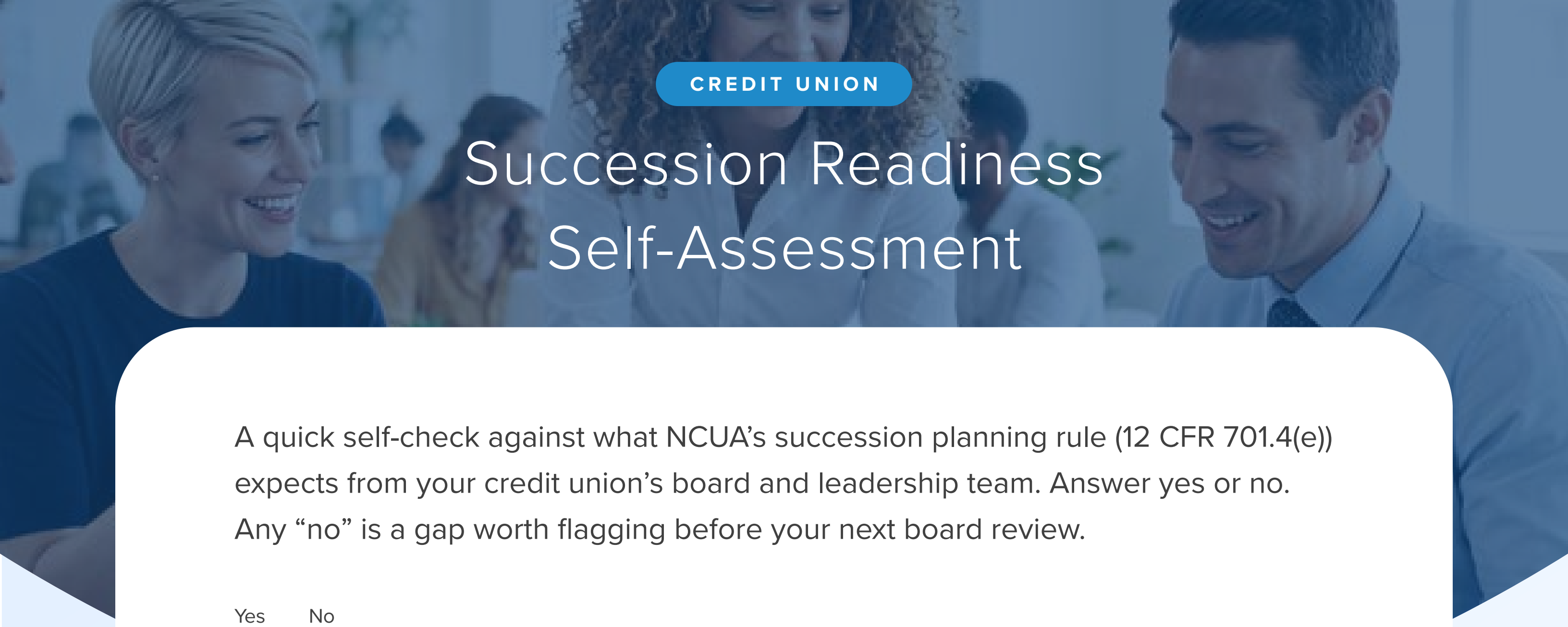

CREDIT UNION

Succession Readiness Self-Assessment

A quick self-check against what NCUA's succession planning rule (12 CFR 701.4(e)) expects from your credit union's board and leadership team. Answer yes or no. Any "no" is a gap worth flagging before your next board review.

Yes	No	
☐	☐	Our written succession plan names specific individuals or clear readiness criteria for each covered position, not just job titles.
☐	☐	We have documented evidence of skill development activity for at least one likely successor per key role.
☐	☐	Our board has reviewed the succession plan within the last 12 months, ahead of the 24-month requirement.
☐	☐	Newly appointed board members have been briefed on the succession plan within 6 months of joining, as the rule requires.
☐	☐	We can show, with data, how member service, loan processing, and back-office staff are building capability toward covered roles, not just relying on manager impressions.
☐	☐	Our succession plan accounts for turnover risk in distributed branch locations, not just headquarters roles.
☐	☐	We have a repeatable process for updating the plan between board reviews, rather than treating it as an annual project.

Answering no to some or all of these questions suggests your succession plan may be filed but not lived. That's the gap workforce analytics is built to close.