

Expatriate Quota/Knowledge Transfer Schedule Template

Succession Plan and Understudy Progress Report
 S/N
 Expatriate Quota Position
 Expatriate Quota approval obtained from NCDMB
 If Yes, Indicate type of Approval
 Approval date
 Date FMI approval was issued for the position
 Date of Quota Establishment
 Due Date for Nigerianization of Position
 Remaining Months for Nigerianisation

Expatriate's Profile

Name of Expatriate
 Expatriate Job Title
 Cadre of Expatriate
 Professional Qualification of Expatriate
 Date Expatriate assumed position
 Location of Expatriate
 Years of Experience

Expatriate's Educational Qualifications (e.g. First Degree in Accounting)

Secondary/High School
 First Degree (Diploma, Degree etc)
 Second Degree/Masters

Name of Schools attended	Certificate received	Date received

WORK EXPERIENCE

(Last 3 Jobs starting with the most recent)
 Employer 1
 Employer 2
 Employer 3

Employer's Name	Position	Period (start - end date)

Understudies Profile

Name of Understudy
 Position of Understudy
 Cadre of Understudy
 Type of Employment of Understudy
 Qualification of Understudy
 Location of Nigerian Understudy
 Years of Experience
 Start Date (Understudy Program)
 End Date (Understudy Program)

Understudy 1	Understudy 2

Expatriate Job description

Roles and Responsibilities

PROFESSIONAL CERTIFICATION
 (where applicable, please indicate the professional qualifications/certifications required for this role) E.g. CISA, ACCA, ACIPM

Job Qualification

Qualifications required for this role

Key performance Indicator (measures of success)

List with description

Expatriate and Understudy progress Competency Assessment Report
 Competencies and Definition of Proficiency Levels (PL): Please see below the definitions of the four (4) proficiency levels.

- 0: No Capability: Does not possess this competency
- 1: Limited Capability: Substantial level of supervision when performing tasks related to this competency
- 2: Adequate Capability: Able to complete tasks requiring this competency with minimal supervision
- 3: Advanced Capability: Displays this competency without assistance and is capable of coaching others
- 4: Expert Capability: Known as an expert in this area. Focus regarding competency is strategic

Functional Competencies	Target Proficiency Level	Expatriate Proficiency Level	Proficiency Level of Understudy 1		Proficiency Level of Understudy 2	
			Initial PL	Current PL	Initial PL	Current PL
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

****Firm Commitment and date to Nigerianize Position (As indicated below)**

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**Firm Commitment and date to Nigerianize Position - This should comprise of assurances the requesting company is making to the Board regarding the understudy's progress as a result of knowledge transfer on the project. Examples of Such Commitments include: e.g. 1 - By Q3 2016 the Nigerian Understudy will assume this position having acquired the necessary skills and competence to execute the functions of this position.