



mejorando group

***Succession
Planning:
Organization
Self-Assessment***

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HOW DO YOU RATE YOUR AGENCY'S RELATIVE PREPAREDNESS ON SUCCESSION PLANNING AND MANAGEMENT?

To determine how well your organization is currently handling succession planning, complete the following questionnaire. Read each item in the Questionnaire. Check Yes or No. When you finish, score and interpret the results using the instructions appearing at the end of the Assessment Questionnaire. Use the Questionnaire as a starting point to determine the need for a more systematic approach to Succession Planning and Management in your organization.

In my organization, I would say that Succession Planning and Management		Yes	No	Notes
1.	Enjoys top management participation, involvement and support?			
2.	Is a major focus of our Executive Leadership Team?			
3.	Extends to all levels rather than being restricted to top positions only?			
4.	Has sensitized each executive and department director to an obligation to identify and prepare successors?			
5.	Has prompted us to complete an analysis of our Workforce Demographics to identify mission-critical positions?			
6.	Has helped us create and implement a social media strategy to announce job openings?			
7.	Stimulated the revision of job announcements to be more role-centric instead of task-centric?			
8.	Prompted us to refresh our interviewing process for external candidates with "hiring for fit" receiving more importance?			

In my organization, I would say that Succession Planning and Management		Yes	No	Notes
9.	Encouraged us to refresh our Learning/Training Programs to focus on supervisor-management-leadership skills?			
10.	Has prompted our organization to establish and conduct specific employee developmental programs that are designed to accelerate the development of high-potential employees?			
11.	Has prompted the organization to focus employee development programs on increasing the familiarity of high-potential employees with who does what, when they do it, where they do it, why they do it, and how they do it?			
12.	Has prompted the organization to focus employee developmental programs on the critical questioning of “the way things have always been done”?			
13.	Has prompted us to create and implement a Mentoring Program?			
14.	Has encouraged us to explore further the “what” and “how” of Knowledge Transfer?			
15.	Is conducted in a systematic way?			
16.	Has prompted us to revise our promotional practices to include a stronger emphasis on performance and potential, and less on tenure?			
17.	Is reinforced by those in leadership positions to do substantially more than just talk about succession planning?			

In my organization, I would say that Succession Planning and Management		Yes	No	Notes
18.	Is supported by career paths that move not just up a specialized ladder but across a continuum of professional competence (i.e. career lattice)?			
18.	Is supported by frequent opportunities for employees to accept new challenges?			
19.	Is driven, in part, by recognition that employees have a stake in the organization and share its successes?			
20.	Has helped us realize it's an employee retention strategy?			

Total _____

Give you organization 1 point for each Yes and a 0 for each No listed above. Total the points from the Yes column and place the sum in the line opposite the word Total above.

Contact Patrick Ibarra for a *FREE* consultation that will include an interpretation of your agency's score and potential next steps. Patrick can be reached at 925 518-0187 or patrick@gettingbetterallthetime.com