

Succession Planning Survey

1. Demographics

Thank you for taking time to answer these questions about your position and the leadership competencies critical for your division.

1. Name:

2. Division/Program

- Administrative Services
- Benefits
- Communications
- Executive Office
- IHSS
- IT
- Labor Relations
- Legal
- Legislation
- PMD
- Psych Screening
- Savings Plus
- Selection
- WDPSP
- Statutory Appeals
- OFMER
- Civil Rights
- Other (please specify)

3. Your Job Title

4. Today's Date

Date / Time MM DD YYYY
 / /

5. Do you anticipate losing a member of your management team due to retirement, promotion, or other factors (such as life events) within the next 12 months?

- Yes
- No
- Unknown

6. TMAC - Interview Team

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2. Leadership Competencies

7. Please select and rank the following competencies by how necessary they are for your position. (Interviewer team provides competency index card).

<input type="text"/>	Business Acumen
<input type="text"/>	Inspirational Leadership
<input type="text"/>	Results-Driven
<input type="text"/>	Stewardship
<input type="text"/>	Talent Management
<input type="text"/>	Vision & Strategic Thinking
<input type="text"/>	Adaptability
<input type="text"/>	Customer Engagement
<input type="text"/>	Collaboration
<input type="text"/>	Digital Fluency
<input type="text"/>	Fostering Diversity
<input type="text"/>	Interpersonal Skills
<input type="text"/>	Innovative Mindset
<input type="text"/>	Honesty & Integrity
<input type="text"/>	Resilience
<input type="text"/>	Communication

8. How do the top three ranked competencies contribute towards your Division's/Program's critical functions, strategic goals, and/or mission?

9. What professional experiences are critical for your position?

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3. Knowledge, Skills and Abilities

10. To be successful in your position, which of the following knowledge areas are critical?

- Laws, rules/regulations, case law
- Policies and procedures
- "Unwritten rules" or informal policies
- Technical/industry knowledge
- Other - please provide details in the following text box

Please provide specific details and/or expand upon any of your answers.

11. What Knowledge, Skills, or Abilities are critical for your position?

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4. Training

12. Which of the following training is important for your position?

- Sac State Leadership Academy
- Other training offered on CalHR's training calendar
- Division training
- Training from other state departments
- Private entity training (e.g., CPS Consulting, UC Davis)
- It is difficult to find a training provider who offers the necessary training

Other (please specify)

13. What training does your unit use to develop your management team?

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5. Tools and Resources

14. Which of the following tools are being used by your Division/Program to ensure knowledge transfer?

- Training classes
- Desk manuals
- Regular meetings to discuss operational and leadership issues
- Supervisor drop files
- Internet websites & resources
- Onboarding processes
- Job rotation assignments
- Job shadowing
- Training and development assignments
- Guidance from retired annuitants
- Individual development plan (IDP)
- Internal Division documentation, such as best practices, lessons learned, history files
- Other (please specify)

15. Please describe how or where you would recruit to fill your position in the future?

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6. Tools and Resources (continued)

16. Have you ever received **formal** mentoring from any of these sources:

- A previous professional relationship
- A professional organization
- A retired annuitant
- A professional management coach/mentor
- No
- Other (please specify)

17. Would you benefit from participating in a formal mentoring program?

- Yes
- No
- Not Sure

18. Would your managers benefit from participating in a formal mentoring program?

- Yes
- Somewhat
- No

19. To your knowledge, do any of your managers participate in any professional memberships/organizations?

- Yes
- No

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7. Interview is now complete

Thank you for your time. If you have answered all of questions, please click the "Done" button. If you would like to review your answers, please click the "Previous" button and review your answers on the previous pages before clicking the "Done" button.