

**IN THIS SAMPLE, THE DETAILS ARE FICTITIOUS**

# Career skills inventory and succession planning survey

This form is to be used by professionally and technically qualified officers to state their qualifications, accumulated occupational skills, personal skills and experience, and to place a value on these factors to the organisation. In addition, this form is to be used to survey an officer's views on succession planning within the organisation. This information and survey will enable the organisation to develop structural and recruitment strategies to procure skills and experience that will maintain competencies within the public sector. Read the notes at page 5 before completing the form and survey.

## 1. ABOUT YOU AND YOUR JOB

Name:	Fred Bloggs		Supervisor:	Joe Smith	
Year commenced:	1998	Position Number:	12345	Grade:	10
Position title:	Senior Project Officer, Government Infrastructure Project Planning				
Organisation:	Name of sub-section, name of Section, name of Branch, name of Division, name of Agency/Department				
Functional role:	Short statement of the functional role of the sub-section.				
Positional role:	Short statement of the role of your current position.				
Your current age (optional):	63	Your planned retirement age:	67	Planned retirement year:	2015
Comment (optional): Short statement about your expectations of employment in your current job and in the organisation from now until your planned retirement year, including job challenge and job satisfaction.					

## 2. YOUR QUALIFICATIONS

Qualification	Year	Institution	Value to organisation
BE (Civil Engineering)	1969	UNSW	HIGH – directly relevant to current role and function.

## 3. YOUR OCCUPATIONAL SKILLS

Occupational Skill / Skill Group	Skill utilisation in present job	Value to organisation
<b>INFRASTRUCTURE AND FACILITIES</b> 1. CIVIL ENGINEERING 2. LAND MANAGEMENT 3. ACCOMMODATION PLANNING 4. CAPITAL WORKS PROGRAMMING 5. FACILITIES ENGINEERING & MANAGEMENT 6. REPAIRS & MAINTENANCE PROGRAMMING 7. VALUE ANALYSIS / VALUE ENGINEERING 8. BUILDING MECHANICAL SERVICES 9. LIFE CYCLE ANALYSIS	Engineering and infrastructure skills are used on a daily basis.	HIGH. Engineering and infrastructure management skills are used to carry out planning policy in the infrastructure sector and provide advice to the government on infrastructure projects.

OCCUPATIONAL HEALTH & SAFETY	Used on a daily basis.	HIGH. OHS skills are of value to the organisation in the prevention of workplace accidents, deaths & injuries.

#### 4. YOUR PERSONAL SKILLS & ATTRIBUTES

Personal Skill / Skill Group / Attribute	Skill utilisation in present job	Value to organisation
<b>TEAM WORKER SKILLS</b> 1. ORGANISING 2. LEADERSHIP 3. INSPIRING 4. ANALYTICAL 5. INFLUENCING 6. PROMOTING 7. COOPERATIVE 8. BELBIN TEAM RATING 9. MYERS-BRIGGS RATING	Team worker skills utilised on a daily basis	HIGH. Team worker skills are essential for working in the infrastructure sector, particularly in working with infrastructure provider organisations, which place a very high expectation on cooperation with government during project scoping and formulation.
NETWORKING	Used on daily basis	HIGH. Networking skills are essential for making and maintaining relationships and contacts across the infrastructure sector.

#### 5. YOUR CAREER EXPERIENCE

Field of Experience	Years	Relevance to present job	Value rating
Construction Engineering	28	Experience in design interpretation, construction planning, project management and delivery are highly relevant to the challenges in government infrastructure specification and provision.	HIGH.
Infrastructure Projects	13	Knowledge of ports, airports and land based assets, together with capital upgrades and life cycle maintenance is relevant to developing robust infrastructure that increases public confidence in government infrastructure and services.	HIGH.
Total	41		

## 6. YOUR INPUT TO SUCCESSION PLANNING

### 6.1 Your job description

Does your job description accurately describe what you actually do?

NO											YES
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What changes are needed?

Comments:

### 6.2 Selection criteria for your position

Do the selection criteria in your job description prescribe the qualifications, skills, experience and attributes needed to actually carry out your duties and functions?

NO											YES
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What changes are needed?

Comments:

### 6.3 The value of your advice and your position

Have there been examples in your sector or workplace where your professional or technical advice (either formal or informal) has been ignored, resulting in incoherent policy, failed programs, increased risk exposure to the government, increased costs to the government or increased costs to be borne by the community? Indicate the order of scale of the consequences of ignoring professional and technical advice in your case.

#### 6.3.1 Policy failure

MINOR											SIGNIFICANT
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#### 6.3.2 Program failure

MINOR											SIGNIFICANT
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#### 6.3.3 Increased risk exposure

MINOR											SIGNIFICANT
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#### 6.3.4 Increased costs to government

MINOR											SIGNIFICANT
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#### 6.3.5 Increased costs to be borne by community

MINOR											SIGNIFICANT
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What changes are needed to ensure your advice is acknowledged and your advisory role/position is preserved?

Comments:

### 6.4 Succession planning for a skilled public sector

What are your views on some suggested options for succession planning and workplace restructure?

**6.4.1 Identify positions where professional and/or technical skills increase public sector competence.**

DISAGREE											AGREE
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Comments:

**6.4.2 Classify positions according to the occupant's skills – i.e. Professional / Administrative “dual badged”.**

DISAGREE											AGREE
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Comments:

**6.4.3 Redesign jobs and criteria and enable occupant to agree to the job description at existing grade.**

DISAGREE											AGREE
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Comments:

**6.4.4 Redesign jobs and criteria at a revised grade and enable occupant to apply for internal recruitment.**

DISAGREE											AGREE
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Comments:

**6.4.5 Identify career streams for professional development of officers in Professional and equivalent positions.**

DISAGREE											AGREE
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Comments:

**6.4.6 Develop strategies for recruiting and retaining skilled staff with commensurate levels of experience.**

DISAGREE											AGREE
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Comments:

**6.4.7 Conduct workplace functional review, workload analysis, job redesign and restructure to build a skilled and technically competent workforce.**

DISAGREE											AGREE
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Comments:

**6.4.8 Investigate flexibility arrangements – transition-to-retirement and mentoring positions, etc.**

DISAGREE											AGREE
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Comments:

What are your own suggested options for succession planning and workplace restructure?

Comments:

## 7. NOTES FOR COMPLETING THE FORM AND SURVEY

### Qualifications

Insert your professional and/or technical qualifications, the year in which you completed them, the teaching institution and state the value of each qualification to your current job in the organisation. Add rows if required. The value statement should be rated as either "Low", "Moderate" or "High". Use the free text space for additional comment. Note that a qualification that is of limited value in your current job may be of higher value elsewhere in the organisation.

### Occupational skills

Many senior staff have accumulated occupational skills over their employment years. These can be attached in a separate list, aggregated by skill group or as single skills. Insert each skill group or single occupational skill and indicate the utilisation of each skill group or single skill. Add rows if required. (*The sample form shows an example of a skill group and single skills.*) Then state the value of that skill in your current job in the organisation, rated as either "Low", "Moderate" or "High". Use the free text space for additional comment. Skills under-utilised in your current job may be of higher value elsewhere in the organisation.

### Personal skills and attributes

Experienced staff members have developed over their careers, a set of personal skills and attributes that are of benefit to the organisation. These can also be attached in a separate list, aggregated by skill group or as single skills. Insert your personal skills and attributes and indicate the utilisation of each skill group or single skill. Add rows if required. (*The sample form shows an example of a skill group and an individual skill.*) Then state the value of that skill in your current job in the organisation, rated as either "Low", "Moderate" or "High". Use the free text space for additional comment. Your skills and attributes may be more highly valued in project teams and positions elsewhere in the organisation.

### Career experience

Where you have worked in several career fields, insert the field of career experience and the number of whole years worked in that field. State the relevance of that career field to your current job in the organisation and state the value of that career field to your work. The value statement should be rated as either "Low", "Moderate" or "High". Note that your field of experience may be of limited value in your current job; however your experience may be more highly valued in cross-sectoral project teams and positions elsewhere in the organisation.

### Succession planning survey

The organisation values the contribution made over many years by senior, experienced, qualified, skilled and competent staff. In order to plan for dealing with an ageing workforce and the potential loss of workplace competencies that would impact on the role of the public sector in supporting the government of the day, your frank and honest opinions are sought on succession planning and workforce structuring.

Each question enables you to rate your response as a level of compliance or order of scale. Insert a letter X in one of the ten boxes. This survey, in combination with your career skills inventory will enable the development of an organisational structure and recruitment strategies, to procure those skills and experience that will maintain these competencies within the public sector. A skilled and experienced public sector will be required by the government of the day to provide sound advice and to carry out the legislative obligations of government.

## 8. PRIVACY STATEMENT

The information collected in this form and survey will be stored securely and only used for the purposes for which it has been collected. See the organisation's full privacy policy at the internet site: [www.....](#)

## 9. CONTACT OFFICER

The contact officer for this form and survey is: .....