Introduction to the Environmental Readiness Assessment Template

The Environmental Readiness Assessment template serves as a tool to assess an organization’s level of readiness for change in four environmental areas:

1. Organizational readiness
2. Leadership readiness
3. Employee readiness
4. Supporting infrastructure readiness

Each environmental area is assessed based on statements regarding the readiness of that area, and assigned a numerical score, and ultimately, a priority level. The Environmental Readiness Assessment assists the OCM Practitioner in identifying OCM priority areas early in the project lifecycle.

Instructions and descriptions are provided to help the reader understand the assessment’s purpose and how to complete it.

Template style conventions are as follows:

| Style | Convention |
| --- | --- |
| Normal text | Indicates placeholder text that can be used for any project. |
| [Instructional text in brackets] | [Indicates text that is be replaced/edited/deleted by the user] |
| *Example text in italics* | *Indicates text that might be replaced/edited/deleted by the user* |

As you complete the template, please remember to delete all instructional text (including this section) and update the following items, as applicable:

* title page
* version history
* table of contents
* headers
* footers

Update the document to a minor version (e.g., 1.1, 1.2) when minimal changes are made and a major version (e.g., 2.0, 3.0) when significant changes are made.

Environmental Readiness Assessment Template

[Once the OCM Practitioner has a thorough understanding of the organization and organizational culture, he/she should complete the Environmental Readiness Assessment.

In the sections below, score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. At the end of each table, calculate the total numerical score for the environmental area that is being assessed.]

# Organizational Readiness

[In the table below, score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. At the end of the table, calculate the total numerical score for the environmental area that is being assessed.]

|  | Strongly Disagree | Strongly Agree |
| --- | --- | --- |
|  |  |
| Organizational Readiness |  |  |  |  |  |
| 1. The project is a top priority for the organization.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization is ready to make this project successful.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization can successfully undertake this project in conjunction with meeting current demands and workload of the day-to-day operations.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization has a track record of disciplined project execution.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Lessons learned from similar projects have been reviewed and incorporated into the organization’s processes.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization is risk tolerant.
 | 1 | 2 | 3 | 4 | 5 |
| 1. This is the only major change initiative currently underway.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The IT organization is effective.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The IT organization supports this project.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The affected Program organization(s) are effective.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The affected Program organization(s) support this project.
 | 1 | 2 | 3 | 4 | 5 |
| **Organizational Readiness Total Score** |  |  |  |  |  |

# Leadership Readiness

[In the table below, score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. At the end of the table, calculate the total numerical score for the environmental area that is being assessed.]

|  | Strongly Disagree | Strongly Agree |
| --- | --- | --- |
|  |  |
| Leadership Readiness |  |  |  |  |  |
| 1. The project is a top priority for leadership.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Leadership has time to commit to this project.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Leadership is timely and effective in decision making.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Leadership communicates and provides clear direction.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Leadership is respected and trusted.
 | 1 | 2 | 3 | 4 | 5 |
| **Leadership Readiness Total Score** |  |  |  |  |  |

# Employee Readiness

[In the table below, score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. At the end of the table, calculate the total numerical score for the environmental area that is being assessed.]

|  | Strongly Disagree | Strongly Agree |
| --- | --- | --- |
|  |  |
| Employee Readiness |  |  |  |  |  |
| 1. Employees are highly collaborative.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees view the organization as a positive work environment.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees are highly engaged and motivated.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees feel open to provide constructive feedback and challenge the status quo.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees are not fatigued from other change initiatives.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees are willing to embrace change.
 | 1 | 2 | 3 | 4 | 5 |
| **Employee Readiness Total Score** |  |  |  |  |  |

# Supporting Infrastructure Readiness

[In the table below, score each statement, with a score of 1 indicating “Strongly Disagree” and a score of 5 indicating “Strongly Agree”. At the end of the table, calculate the total numerical score for the environmental area that is being assessed.]

|  | Strongly Disagree | Strongly Agree |
| --- | --- | --- |
|  |  |
| Supporting Infrastructure Readiness |  |  |  |  |  |
| 1. This project will have access to the talent/resources necessary.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization is proactive in attracting and developing top talent.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees will have access to the necessary training and skill development.
 | 1 | 2 | 3 | 4 | 5 |
| 1. Employees understand their performance expectations.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization provides the appropriate rewards and recognition.
 | 1 | 2 | 3 | 4 | 5 |
| 1. The organization effectively aligns people, processes, and strategies to deliver timely and measurable results.
 | 1 | 2 | 3 | 4 | 5 |
| **Supporting Infrastructure Readiness Total Score** |  |  |  |  |  |

| Readiness Area Total Score | High Priority | Low Priority |
| --- | --- | --- |
| Organizational Readiness Total Score | 11 – 22 | 23 – 55 |
| Leadership Readiness Total Score | 5 – 15 | 16 – 25 |
| Employee Readiness Total Score | 6 – 18 | 19 – 30 |
| Supporting Infrastructure Readiness Total Score | 6 – 18 | 19 – 30 |
| **Overall Readiness Total Score** | **28 – 84** | **85 – 120** |

# Summary of Results

[In the Summary of Results table below, record the total score and priority level for each environmental area and the total score and priority level for the assessment as a whole, based on the guidance provided above. The priority levels are calculated based on the minimum and maximum scores possible in each environmental readiness area.]

| Readiness Area | Total Score |  | Priority Level |
| --- | --- | --- | --- |
|   |  |  |  |
| Organizational Readiness |  |  |  |
|  |  |  |  |
| Leadership Readiness |  |  |  |
|  |  |  |  |
| Employee Readiness |  |  |  |
|  |  |  |  |
| Supporting Infrastructure Readiness |  |  |  |
|  |  |  |  |
| **Environmental Readiness Total Score** |  |  |  |