

Our Starting Place:

The Succession Self-Assessment



The Leadership Continuity Landscape at Your Organization: A Self-Assessment

The goal of leadership continuity planning is to introduce and maintain a culture of succession within your organization. This self-assessment provides a snapshot of the current landscape that exists and within which leadership continuity will be discussed, and it has been designed to help you prioritize your work following today's workshop.

THE FOURTEEN QUESTIONS THAT MAKE A DIFFERENCE

For each question below, please indicate how effective your organization is currently addressing these key factors associated with Leadership Continuity.

“4” represents very effective
“2” represents ineffective

“3” represents effective
“1” represents very ineffective

1. We develop a strategic plan (or long-range strategy) and use it to guide our organization's management and governance activities.

1 2 3 4

COMMENTS: _____

2. Our planning documents balance developing and deploying financial capital resources for our organization with developing and deploying the human capital resources necessary to meet our long-range goals.

1 2 3 4

COMMENTS: _____

3. People in our organization have a common understanding of what leadership continuity and succession planning means and the activities that are associated with leadership continuity and succession planning efforts.

1 2 3 4

COMMENTS: _____

4. We have an emergency succession plan (sometimes called a contingency plan) that outlines what will happen should a key position become vacated.

1 2 3 4

COMMENTS: _____

5. Our budget designates at least one percent of total revenue for board and staff development.

1 2 3 4

COMMENTS: _____

6. Our organization has a track record of regular and thoughtful performance reviews for our key positions in management and our key positions in governance.

1 2 3 4

COMMENTS: _____

7. Fundraising and community relationships are a shared and coordinated responsibility between staff professionals and community leaders.

1 2 3 4

COMMENTS: _____

8. Our entire organization is aware that we strive to be a good employer, and, as such, we are confident that basic human resource systems are in place including maintained personnel files, employee policies that are reviewed annually, staff and volunteer job descriptions are current, and a procedure for resolving grievances that may arise is in place and respected

1 2 3 4

COMMENTS: _____

9. Our board of directors adheres to a term-limits policy and recognizes that an organizational commitment to leadership continuity and succession planning is a determining and significant factor in its enforcement

1 2 3 4

COMMENTS: _____

10. Our board of directors represents a level of economic, cultural, and racial diversity appropriate to the mission of our organization and in the communities that we serve.

1 2 3 4

COMMENTS: _____

11. Key leaders in the organization are aware of the career aspirations of the people who are working or volunteering for the organization.

1 2 3 4

COMMENTS: _____

12. Key leaders are aware of the estimated costs that would be associated with replacing key positions in their organization and the current market value of those positions.

1 2 3 4

COMMENTS: _____

13. A defined grooming process has been developed to create an escalator of future board members and board leaders.

1 2 3 4

COMMENTS: _____

14. Our major contributors and funders are well aware of our commitment to assuring a continuity of leadership for the sustainability of the organization and the advancement of its mission

1 2 3 4

COMMENTS: _____

LEADERSHIP CONTINUITY DISCUSSION GRID

General Observations About The Questions And Their Scores	The Two Ratings Considered Most Significant to Your Organization	Questions Resulting From This Self-Assessment For Further Discussion

The Third Sector Company, Inc. is dedicated to fostering a continuity of professional and voluntary leadership for the nonprofit sectors of the United States and Canada through succession planning training and consultation, interim executive management, executive retention support, executive performance planning and review, search committee training and support, and next generation board and executive leadership training.

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