

# Succession Planning Questionnaire

**1 = Never   2 = Infrequently   3 = Not Sure   4 = Frequently   5 = Consistently**

1. The organization has included succession planning in the strategic or other planning processes. \_\_\_\_\_
  2. The board of directors initiates discussions about leadership legacy planning with the chief executive. \_\_\_\_\_
  3. The chief executive initiates leadership legacy planning discussions with the board. \_\_\_\_\_
  4. Legacy leadership discussions include staff beyond the chief executive. \_\_\_\_\_
  5. Senior staff is engaged and visible to external partnerships and constituencies. \_\_\_\_\_
  6. The organization evaluates and manages employee performance. \_\_\_\_\_
  7. The organization identifies potential talent and develops staff at the senior and middle levels. \_\_\_\_\_
  8. Senior staff members in the organization have access to opportunities to develop their leadership potential (i.e. coaching, education, experiences). \_\_\_\_\_
  9. Team leaders are held accountable for coaching and developing their direct reports. \_\_\_\_\_
  10. The board reviews and updates its governance plan (including term limits). \_\_\_\_\_
  11. The board evaluates its process to manage its own leadership succession. \_\_\_\_\_
  12. The board engages in self-assessment of its performance. \_\_\_\_\_
  13. The board engages in yearly assessment of the chief executive. \_\_\_\_\_
  14. The board of directors has a strategy in place for recruiting, orienting and developing new board members. \_\_\_\_\_
- Total** \_\_\_\_\_

## Scoring

<b>A score of 65 – 70</b>	The organization is in excellent condition to manage succession
<b>A score of 50 - 64</b>	Assess the lower scores to determine where to focus succession planning efforts
<b>A score of 40 - 49</b>	The organization may be at risk of struggling through a potential transition. Determine where it needs to start to create a viable plan for succession.
<b>39 points or less</b>	The organization could be at serious risk. Begin now to create a succession plan and identify key activities to improve the situation.