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

<table>
<thead>
<tr>
<th>A score of 65 – 70</th>
<th>The organization is in excellent condition to manage succession</th>
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<tbody>
<tr>
<td>A score of 50 - 64</td>
<td>Assess the lower scores to determine where to focus succession planning efforts</td>
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<tr>
<td>A score of 40 - 49</td>
<td>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.</td>
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<tr>
<td>39 points or less</td>
<td>The organization could be at serious risk. Begin now to create a succession plan and identify key activities to improve the situation.</td>
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