

Organizational Succession Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (Yes), partially true (Part) not true at all (No) or you don't know (DK)? In addition, if Part or No, indicate the priority action this item should have within your organization: "Priority": 0 = Low, 1 = Medium, 2= High

Emergency Backup Plan for Executive Director/CEO					
Our organization has a written emergency backup plan for the chief executive.	Yes	Part	No	DK	0 1 2
This plan includes a designated first and second backup to stand in for the chief executive in case of an unplanned absence.	Yes	Part	No	DK	0 1 2
There is a cross training plan to prepare the first and second backups for assuming the assigned chief executive's key duties.	Yes	Part	No	DK	0 1 2
There is a communication plan which describes who needs to know, when, and by whom informed in case of unplanned absence of the chief executive.	Yes	Part	No	DK	0 1 2

Emergency Backup for Senior Managers/Key Managers or Staff					
Our organization has a written emergency backup plan for senior managers/key staff functions and roles.	Yes	Part	No	DK	0 1 2
This plan includes a designated first and second backup to stand in for the senior manager/key staff person in case of an unplanned absence.	Yes	Part	No	DK	0 1 2
There is a cross training plan to prepare the first and second backups for assuming the senior manager/staff person's key duties.	Yes	Part	No	DK	0 1 2
There is a communication plan which describes who needs to know, when, and by whom informed in case of unplanned absence of the senior manager/key staff person.	Yes	Part	No	DK	0 1 2

Succession Policy					
Our organization has a written succession policy to guide how the Board will fill the opening in a planned chief executive transition.	Yes	Part	No	DK	0 1 2
This policy states how the Transition and Search Committee is comprised and the role of the committee.	Yes	Part	No	DK	0 1 2
This policy addresses how we will handle internal candidates and what kind of search we will do to find candidates.	Yes	Part	No	DK	0 1 2
This policy states our commitment to diversity and inclusiveness in our recruiting and hiring.	Yes	Part	No	DK	0 1 2

Other Helpful Actions					
Our organization, at least annually, reviews and updates position descriptions, along with intentional conversations with staff regarding personal and professional goals.	Yes	Part	No	DK	0 1 2
Our organization routinely reviews bench strength against key competencies and functions needed to achieve mission.	Yes	Part	No	DK	0 1 2
Our organization reviews position workloads annually to ensure they have not become undoable by the current person in the position.	Yes	Part	No	DK	0 1 2
Our organization has a comprehensive list of all passwords, bank accounts, IT information, and key contacts in one place with more than one person familiar with details.	Yes	Part	No	DK	0 1 2
Our organization annually reviews our emergency backup plans and succession policy.	Yes	Part	No	DK	0 1 2