

ASSESSING YOUR ORGANIZATION'S VULNERABILITY DURING AN EXECUTIVE TRANSITION				
<i>Created by Pathway Associates, LLC</i>				
This assessment tool is intended to give an individual a sense of the level of potential disruption that an unplanned short term or permanent departure of your current director could have to overall operations.				
INSTRUCTIONS: After reading each statement, put an "x" in one of the four columns to the right. Once you have answered each question, follow the instructions at the end of the survey to interpret your results.				
	YES	NO	Don't Know	Does Not Apply
1. Board members play an active role in fund raising.				
2. All board members make an annual contribution to our organization.				
3. Our organization has operated in the "black" for the past three years.				
4. Our income sources are diverse.				
5. A communication plan announcing our director's eventual departure has been adopted.				
6. A plan to honor our current director's accomplishments is in place when he or she leaves the post.				
7. The role of outgoing director in creating an executive succession plan has been agreed upon.				
8. I know with whom it will be important to communicate when there is a transition between directors.				
9. Our directors' tenure is usually more than three years or less than seven.				
10. The director's job description is updated annually.				
11. Staff's professional development opportunities dovetail closely with our succession plan.				
12. Staff members have expressed interest in assuming a greater leadership role.				
13. Board members typically play an important and active governance role.				
14. A list of the current director's critical relationships is compiled and centrally located for easy access.				
15. There is a signed statement of understanding as to which two or three individuals are willing to carry out the director's responsibilities on a short-term basis, if necessary.				
16. An up-to-date list of critical organizational operations and information is readily available.				
17. I understand our organization's mission.				
18. Our goals effectively direct our resources toward fulfilling our mission.				
19. Our organizational vision is clear to me.				
20. I agree with our organization's stated mission.				
HOW TO INTERPRET THE RESULTS: Add up the number of responses in each column. If you have answered "yes" to fewer than 10 questions, then your nonprofit's programs and fund raising efforts may be at risk of disruption or failure upon the departure of your current director. Immediate action, including possible further assessment is warranted. Call Barbara Pioli at Pathway Associates at (801) 803-0363 or email barbara@pathwayassoc.com for more information or to schedule an appointment.				