

Appendix

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**TALENT INVENTORY
KEY POSITION ASSESSMENT**

Position: _____

What critical work would stop if this position were left vacant?

Is specialty or unique expertise required for this position?

What are the role-specific competencies required?

Rate the impact of this position on fulfilling the mission / goals of the organization using a 1 - 10 scale (1= low impact, 10 = high impact).

Who are the likely successors to this position?

TALENT INVENTORY

EMPLOYEE TALENT ASSESSMENT

Name: _____ Title: _____
 Dept. / Team: _____ Date: _____
 Manager: _____

Job History:

Dates	Position	Key Functions (top 1-3)
<i>Internal Jobs</i>		
<i>External Jobs</i>		

Key Attributes / Strengths / Special Skills:

Major Accomplishments / Special Contributions:

Aspirations / Motivators:

Developmental Needs:

_____ Performance Rating - Rating from last performance review
 _____ Potential Rating - Rate 1-10 scale (1=no potential to move beyond current job; 10=high potential for growth into more responsible position)

DEVELOPMENT PLAN

Employee: _____

Signature _____

Date: _____

Supervisor/Manager: _____

Signature: _____

Date: _____

Department: _____

Date of Appraisal: _____

Time Scale	Development Goal <i>(competency or contribution to be developed)</i>	Training and/or Development Activities	Target Completion Date	Expected Outcome / Measures
<i>Short-term (to meet needs of current role)</i>				
<i>Medium term (to meet changing needs of this/new role)</i>				
<i>Long-term (to meet career objectives)</i>				

Competencies Leadership Development

Leading The Organization	Making Decisions	Interacting With People	Personal Effectiveness	Communicating	Management	Business Acumen
Vision	Conflict Resolution	Coaching	Command Respect	Giving Presentations	Planning & Organizing	Administrative Processes
Org Awareness	Decisiveness	Diversity Awareness	Handling Stress	Listening	Delegation	Technology Management
Team Work	Judgment	Facilitation	Managing Risks	Oral Communication	Supervision	Technical Credibility
Change Management	Systems Thinking	Persuading Others	Time Management	Written Communication	Accountability	
Dealing with Ambiguity		Negotiating	Personal Awareness & Development		Motivating Others	
Political Awareness						
Partnering						
Entrepreneurship						

Leading the Organization

Vision - Defines the ideal or desired outcome for the organization; takes action based on one's beliefs or convictions; sets and demonstrates values; and maintains a focus on future needs as well as present problems.

Organizational Awareness - Understands the organization's mission, strategies, values, and culture; knows and encourages acting within policy and procedure.

Team Work - Utilizes appropriate interpersonal styles and methods during group interactions to ensure that the team accomplishes its goal by facilitating group process, cohesiveness, and teamwork.

Change Management - Accepts role as a change agent; acts as an advocate for change; develops plans and follows through on change initiatives; accepts the ambiguity that comes with change activities.

Dealing with Ambiguity - Copes with change effectively; can shift gears comfortably; can make decisions and act without having the complete picture; can handle risk and uncertainty; doesn't have all the answers.

Political Awareness - Identifies the internal and external politics that impact the work of the organization; approaches each problem situation with a clear perception of

organizational and political reality; can maneuver through political situations effectively to get things done.

Partnering - Develops networks and builds alliances, engages in cross-functional activities; collaborates across boundaries, and finds common ground with a widening range of stakeholders; utilizes contacts to build and strengthen internal support bases.

Entrepreneurship - Actively seeks out and identifies opportunities to develop and offer new services within or outside the organization. Is willing to take risks; initiates actions that may involve deliberate risk to achieve a recognized benefit or advantage.

Making Decisions

Conflict Resolution - Recognizes differences of opinion, brings them out into the open for discussion, and looks for win-win solutions; finds agreement on issues.

Decisiveness - Looks at a fact situation or dilemma, makes a decision, and implements a solution in a timely manner; commits self to a course of action.

Judgment - Identifies problems, determines the key pieces of information needed to solve the problem; considers alternative courses of actions, and selects the logical alternative given the data available at the time of the decision.

Systems Thinking - Looks at problems and issues in a larger perspective that sees relationships between units inside and outside the organization; solves problems in ways that address total system needs, not just the immediate situation; uses creativity and innovation in solving problems.

Interacting With People

Coaching - Provides feedback on performance that is useful and germane, and which assists the individual to improve performance; gives others opportunities to have new assignments and experiences that will help them grow.

Diversity Awareness - Recognizes the differences in others and values those differences; shows respect for people regardless of race, gender, disability, lifestyle, or viewpoint.

Facilitation - Mediates or works with a group to achieve a result; uses group skills to lead the group to consensus, effectively solves problems, and accomplishes tasks.

Persuading Others - Utilizes appropriate interpersonal styles to guide and persuade individuals to meet organizational expectations, accomplish tasks, and follow directions.

Negotiating - Builds consensus through give and take; facilitates "win-win" solutions; can settle differences fairly; can win concessions without damaging relationships; has a sense of timing.

Personal Effectiveness

Command Respect - Possesses and maintains a high level of personal, organizational, and societal values; is honest and trustworthy; engages in law abiding behavior; and respects the property and possessions of others.

Handling Stress - Performs under conditions where pressure, resistance, or opposition make completing the work difficult; remains productive in times of crisis or critical events; helps others to do the same.

Managing Risks - Takes stances or make decisions that involve personal risk, but which are judged advantageous to the individual and the agency.

Time Management - Schedules one's time to assure completion of the critical tasks that must be completed; prioritizes work to be completed to take on most important tasks first.

Personal Awareness and Development - Recognizes own strengths and weaknesses; knows when to change own personal, interpersonal and managerial behaviors; seeks feedback; pursues self-development and opportunities to master new knowledge and skills.

Communicating

Giving Presentations - Communicates effectively in a variety of formal settings; one-on-one, small and large groups, with peers, direct reports, and supervisors; effective inside and outside the organization; can manage group process during a presentation; can change tactics when necessary through the use of lectures, speeches, and/or organized talks.

Listening - Responds to the statements and comments of others; uses reflective responses and clarifying questions to assure the other person that they have been heard; has the patience to hear people out.

Oral Communications - Uses verbal communication to effectively convey ideas and information; nonverbal communication such as eye contact body language and gestures would also be included.

Written Communication - Conveys ideas and information clearly and concisely in grammatical form; gets the message across and achieves the desired outcome.

Management

Planning & Organizing - Sets long and short term goals; defines goals; allocates resources to accomplish the objectives defined during the planning process; this includes the effective use of personnel, facilities, equipment, and capital. Uses project

management skills. Prioritizes based on what is important and where to spend time and resources; monitors and evaluates plans, focuses on results and measuring outcomes.

Delegation - Assign decision making and work functions to subordinates in an appropriate manner, and utilize those individuals effectively.

Supervision - Provide guidance to direct reports, oversee their work, and provide feedback.

Accountability - Assures that effective controls are developed and maintained to ensure the integrity of the organization; holds self and others accountable for rules and responsibilities; can be relied on to ensure that projects are completed in a timely manner and within budget; monitors and evaluates plans; focuses on results and measuring attainment of outcomes.

Motivating Others - Creates a climate where people want to do their best; can motivate a variety of people including direct reports, team, project members, peers, clients; can assess each person's strengths and get the best out of him/her; empowers others; invites input and shares ownership and visibility; makes people feel valued and is well regarded by those s/he works with.

Business Acumen

Administrative Systems - Ability to acquire and administer human, financial, and material resources; includes principles of financial management, preparing, justifying and administering budgets, using cost-benefit thinking to set priorities, managing procurement and contracting; assesses current and future staffing needs; uses merit principles to ensure staff are appropriately selected, developed, utilized, evaluated and rewarded; takes corrective action when necessary.

Technology Management - Uses efficient and cost effective approaches to integrate technology into workplace and improve program effectiveness; develops strategies using new technology to enhance decision-making; understands the impact of technological changes on the organization.

Technical Credibility - Understands and appropriately applies procedures, requirements, regulations, and policies to related specialized expertise; is able to make sound hiring and capital resource decisions and to address training and development needs; understands linkages between administrative competencies and mission needs.

LEADERSHIP DEVELOPMENT RESOURCES

University of Oregon - Department of Planning, Public Policy and Management

Undergraduate studies offer a minor in Nonprofit Administration and a Graduate Certificate Program in Not-for-Profit Management.

Department of Planning, Public Policy and Management

119 Hendricks Hall

1209 University of Oregon

Eugene OR 97403-1209

Telephone: (541) 346-3635

Fax: (541) 346-2040

E-mail: pppmadv@uoregon.edu

Website: <http://pppm.uoregon.edu>

Portland State University - Institute for Nonprofit Management

Certificate programs in four areas:

- Nonprofit Management
- Nonprofit Development
- Nonprofit Financial Management
- Volunteer Management

To register for an INPM Certificate level course, fill out the INPM Registration form. This form may be mailed, faxed or hand-delivered to INPM.

Our mailing address is:

Portland State University - PA/INPM

PO Box 751

Portland OR 97201-0751

Our street address is:

PSU Urban Center

506 SW Mill Street, Suite 780L

Portland, OR 97201

Our fax number is (503) 725-8045.

Any questions, requests, comments, or scholarship information, please call us at (503) 725-8221

Email: inpm@pdx.edu

Website: <http://www.inpm.pdx.edu/index.shtml>

Stanford University - Graduate School of Business

Executive Program for Nonprofit Leaders

2007 Dates: March 11 - 23

Application Deadline: December 4, 2006

Tuition: \$5,800 USD*

*See Program Tuition information below.

Each year, the Center for Social Innovation (CSI) at Stanford University selects nonprofit leaders from social and human services, healthcare, community development, and education organizations to become CSI Fellows. For two weeks on the Stanford University campus, these individuals participate in the Executive Program for Nonprofit Leaders (EPNL), a program designed to further the professional development of current and future leaders in the nonprofit sector.

Who Should Attend

Selection of Fellows is based on an individual's leadership experience or potential as well as their organization's impact or potential. Fellows will typically be the executive director, president, or CEO of their organization. In some cases, an individual who currently serves as a deputy director, chief operating officer, or equivalent will be accepted if he or she is expected to advance to the CEO position within the next three years.

Program Tuition

If selected to be a Fellow, you will receive a grant of \$6,000, awarded by the Center for Social Innovation, toward the program's tuition of \$11,800. You will be responsible for the remaining \$5,800 (this expense may be covered by a third party, e.g. a private foundation, community foundation, or individual(s)). Tuition is due upon acceptance into the program, so we highly recommend that you have a funding commitment prior to applying.

Suzanne Sakraida

Office of Executive Education

Stanford Graduate School of Business

Stanford University

518 Memorial Way

Stanford, CA 94305-5015

Telephone: 650.723.7552 Toll-Free Phone: 866.542.2205 Fax: 650.723.3950

Email: sakraida_suzanne@gsb.stanford.edu

Website: <http://www.gsb.stanford.edu/exed/programs.html>

TACS - (Technical Assistance for Community Services)

Public Trainings – TACS provides affordable, high quality open trainings and workshops on financial management, board issues, fund development, supervision, leadership, cultural competence, technology, and more. TACS conducts over 20 trainings annually in Portland and around the state of Oregon. We also offer hands-on clinics series training.

Effective Supervision

with Cliff Jones, TACS Senior Associate

January 18, 2007

Portland

Explore effective ways to give and receive feedback, address performance challenges, provide support, and create development opportunities that promote individual and professional growth. Learn how to deal with common nonprofit supervision challenges including unclear expectations, ambivalence about authority, low pay, and heavy

workloads. Share your experiences and get help identifying concrete goals that you can implement with individual staff and teams.

<http://www.tacs.org/training/evpost.asp>

TACS
1001 SE Water Ave.
Suite 490
Portland, OR 97214
Telephone: 503.239.4001
Email: info@tacs.org
Website: <http://www.tacs.org/index.asp>

Executive Directors Network (EDN)

Through TACS, EDN provides networking, support, and professional updates on nonprofit management, governance, and funding topics, plus opportunities for networking with peers. Presentation 8:00 - 9:30 am, networking until 10:00 am.

Building Teams that Work
with TBA
December 13, 2006

Oregon Nonprofit Association

Nonprofit leaders from throughout the state will be inviting Oregon's 12,000 public benefit nonprofits to be part of Oregon's first statewide nonprofit association. Use the link below to sign up for email updates about the progress of the association.

<http://www.oregoninvolved.org/?q=node/18>

A. Steering Committee and Staffing

Jan Eggleston, Executive Director of the Deschutes Children's Foundation, and Jay Bloom, President of Morrison Child and Family Services, are serving as co-chairs for the initial steering committee for the Oregon Nonprofit Association.

B. The Oregon Nonprofit Association will:

- Connect Oregon's 12,000 nonprofits electronically
- Create a master calendar to provide information about training opportunities and of training resources for nonprofits
- Share public policy updates
- Facilitate discussion and resource sharing
- Explore opportunities for cost savings through association plans for Directors and Officers and General Liability insurance
- Continue the work of Oregon Involved, helping Oregonians connect and get involved in every community