

SUSTAINABILITY AUDIT: ANONYMOUS STAFF SURVEY

In CompassPoint's experience, one of the most powerful tools for identifying both high priority organizational challenges and the skills needed in the next executive has been the staff questionnaire presented here. The survey and follow-up interviews let staff know that the board values staff viewpoints. They also reduce the anxiety staff experience when a leadership change is underway by engaging them in the process.

How it's used by CompassPoint:

1. A draft of the survey is approved by the board's Succession Planning Committee.
2. A member of the Committee and/or a consultant working with the Committee attends an all-staff meeting
 - To describe the Committee's overall work plan and timeline,
 - To let the staff know how they'll have input to the transition and search process, and
 - To tell them about the anonymous survey and encourage them to fill it out.
3. The survey is set up using surveymonkey.com or a similar tool. An email is sent to all staff with a link to the survey.
4. A Committee member, or a consultant working with the Committee, tabulates the survey and identifies the major staff themes.
5. The Committee member or consultant then meets with groups of staff to present the key outcomes and get more information on the leadership skills and capacity building needs identified.
6. The results of the staff survey and staff group interviews are combined with data gathered from other stakeholder groups—board members, foundation funders, peer agencies—to arrive at both the operational and programmatic issues that need to be addressed by agency management and the skills needed by the next executive director

E-mail message to staff

Dear Staff,

The Succession Planning Committee, which is conducting an organizational assessment before starting the search for our next executive director, seeks your help in deciding what skills we should look for in the next executive director. Your responses to this survey will be used for:

- *setting future directions and capacity building priorities to be addressed with the new executive, and*
- *drafting the profile of skills and attributes the Board will use in recruiting candidates for executive director.*

To complete the survey, please go to: (link to web-based survey)

Thank you for your help!

Survey questions

A. What do you perceive as three of our Executive Director's greatest achievements during her tenure as our agency leader?

- 1.
- 2.
- 3.

B. What elements of her leadership style as executive director do you most appreciate and would like to see carried forward by her successor?

C. What are *your* top three on-the-job achievements over the past 12 months? (*Transition planning involves assessing capabilities throughout the organization, so we're interested in having individual staff members' views on their own recent successes.*)

- 1.
- 2.
- 3.

D. What three changes at the agency would most help you to be more effective *in your specific job*? (*Your responses are important to identifying agency improvements that would help us be more effective in serving our clients.*)

- 1.
- 2.
- 3.

E. What three changes the agency would help the agency to be more effective in pursuing its mission?

- 1.
- 2.
- 3.

F. What three skills or capabilities do you bring to your job that especially contribute to our meeting our goals?

- 1.

2.

3.

G. What are the top three skills that the next Executive Director will need to have in order to be successful?

1.

2.

3.

H. Additional comments:

Thank you for your help!