

Planning Tools			
Activity	Description	Focus	Resources
Environmental Scan	With a group of stakeholders, brainstorm what's happening inside and outside your organization now, in the near future, and in the distant future. Evaluate how prepared the organization is in its current state to handle the horizon; identify gaps; and potential weaknesses.	Overall	<a href="https://guidelinesandprinciples.org/wiki/in-depth/Evaluation_Plans_%26_Systems">https://guidelinesandprinciples.org/wiki/in-depth/Evaluation_Plans_%26_Systems</a>
Critical Position Analysis	Review positions at director level and above, as well as those that have a unique skillset, to evaluate which positions are essential, where you have cross-trained, where you have high turnover and vacancy risks, etc.	People	<a href="https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit">https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit</a>
Critical Success Factor Evaluation	After you determine which positions are mission critical and have a significant vacancy risk, identify competencies, skills, and institutional knowledge that are critical success factors for each of the positions that require a succession plan.	People	<a href="https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf">https://hr.uw.edu/pod/wp-content/uploads/sites/10/2018/08/Succession-Planning-Toolkit.pdf</a>
High Potential Employee Matrix	Identify if any of your existing talent is capable of fulfilling critical positions, including those who could do it if they had additional training or exposure to certain aspects of the job.	People	<a href="https://www.shrm.org/resourcesandtools/tools-and-samples/hr-qa/pages/whatsa9boxgridandhowcananhrdepartmentuseit.aspx">https://www.shrm.org/resourcesandtools/tools-and-samples/hr-qa/pages/whatsa9boxgridandhowcananhrdepartmentuseit.aspx</a>
Financial policy evaluation	Evaluate the organization's finance practices vis-à-vis best practices.	Finance	<a href="https://garfoundation.org/gar-blog/2020/01/financial-best-practice-checklist-for-nonprofits/">https://garfoundation.org/gar-blog/2020/01/financial-best-practice-checklist-for-nonprofits/</a>
Financial evaluation	Work with the organization's finance director and finance committee to evaluate existing systems and capabilities.	Finance	<a href="https://nonprofitoregon.org/sites/default/files/uploads/file/Fin%20Mgmt%20Self%20Assessment.pdf">https://nonprofitoregon.org/sites/default/files/uploads/file/Fin%20Mgmt%20Self%20Assessment.pdf</a>
HR policy checklist	Evaluate the organization's HR practices and policies.	Policies & Procedures	<a href="https://managementhelp.org/organizationalperformance/nonprofits/human-resources.htm">https://managementhelp.org/organizationalperformance/nonprofits/human-resources.htm</a>
Overall policy checklist	Evaluate which overall governance and organizational policies your organization has or needs.	Policies & Procedures	<a href="https://coloradononprofits.org/knowledge/faq/what-hr-policies-and-procedures-should-my-organization-have-place">https://coloradononprofits.org/knowledge/faq/what-hr-policies-and-procedures-should-my-organization-have-place</a>
Board Assessment Tool	Assess the board's policies and procedures vis-à-vis best practices.	Policies & Procedures	<a href="https://www.nhnonprofits.org/sites/default/files/documents/bsaq/samplequestionnaire_with_dei.pdf">https://www.nhnonprofits.org/sites/default/files/documents/bsaq/samplequestionnaire_with_dei.pdf</a>
Board Member Self Assessment	A tool for individual board members to help evaluate their understanding of the organization and their commitment to it.	Policies & Procedures	<a href="https://www.councilofnonprofits.org/sites/default/files/documents/Individual%20Board%20Member%20Self-Evaluation_0.pdf">https://www.councilofnonprofits.org/sites/default/files/documents/Individual%20Board%20Member%20Self-Evaluation_0.pdf</a>
Board Job Description, Contract	Tools for building job descriptions and contracts for board members.	Policies & Procedures	<a href="https://boardsource.org/resources/board-member-job-description/">https://boardsource.org/resources/board-member-job-description/</a> <a href="https://blueavocado.org/board-of-directors/a-board-member-contract/">https://blueavocado.org/board-of-directors/a-board-member-contract/</a>
Communications Plan	101 on drafting a communications plan around a transition.	Communications	<a href="https://blog.hubspot.com/marketing/communications-plan">https://blog.hubspot.com/marketing/communications-plan</a>

