

Professional Nonprofit Interim Management

A Self-Assessment about Your Future Opportunities

When the leaders of a nonprofit organization are seeking interim leadership, their needs can range from assuring key projects are well-managed and the organization is maintained in an orderly fashion, to substantial re-engineering of their enterprise to better advance their mission and serve the community.

In every circumstance, the goal of The Third Sector Company is to provide an interim solution that best fits the needs of the client organization as well as the professional who will present and uphold the brand of Third Sector Company while in the interim position.

In order to provide you, Third Sector Company, and all of our clients with a basic gauge of probable success in fulfilling an interim executive management, we have designed a self-assessment tool that asks for your responses to basic questions about your on-demand leadership skills, experiences, and interests. The results of this assessment are not a condition of granting of licensure. Your responses help you to create a realistic picture of what your future as an interim executive professional may look like, your potential employment by a nonprofit as an interim, the optimal interim arrangement for you and, your comfort in affiliating with Third Sector Company to provide this important community work.

ABOUT YOUR EXPERIENCES & SKILLS FOR EXECUTIVE TRANSITION INTERIM MANAGEMENT

Executive Transitions are the most common and traditional form of interim executive management, whereby, you will be expected to fill a vacant position for an undetermined amount of time during a key position vacancy with specific performance measurements tied to the position. You can expect the position to require an assessment with recommendations, day-to-day operations, change management, close and accountable relationships with your supervisor, and some involvement in the process to hire your permanent replacement.

1. My current level of interim executive management experience:

- No interim engagements
- 1 or 2 Interim Engagements
- 2 to 4 Interim Engagements
- 5 or more Interim Engagements

2. My total number of years of direct experience as a nonprofit leader: _____

3. The "title" I held the longest in my nonprofit leadership career: _____

4. In what fields of nonprofit interim management is your experience or expertise:

- | | |
|---|---|
| <input type="checkbox"/> Animal Welfare | <input type="checkbox"/> Association (Trade or Community) |
| <input type="checkbox"/> Arts | <input type="checkbox"/> Early childhood development |
| <input type="checkbox"/> Education | <input type="checkbox"/> Environment |
| <input type="checkbox"/> Foundation/Fundraising | <input type="checkbox"/> Health Advocacy/Fundraising |
| <input type="checkbox"/> Health Care Delivery | <input type="checkbox"/> Political Organizing, Campaigning, Fundraising |
| <input type="checkbox"/> Religious | <input type="checkbox"/> Research and Science |
| <input type="checkbox"/> Social Justice | <input type="checkbox"/> Other Social Service |

5. Declared Specialties (for example, museums, zoos, synagogues)

ABOUT YOUR NONPROFIT EXPERIENCE & DEMONSTRATED RESULTS

For each area of nonprofit management listed below, please indicate your levels of experience and perceived levels of effectiveness in creating excellent results for a nonprofit organization. A rating of “4” would indicate highest levels of experience and perceived effectiveness and a rating of “1” would indicate the lowest levels of experience and perceived effectiveness. Like academic grading, the higher the number (for example 4.0) the higher the self-grade.

FOR INTERIM EXECUTIVE DIRECTORS:

<u>EXPERIENCE</u>					<u>EFFECTIVENESS</u>			
1	2	3	4	Board Relations & Governance	1	2	3	4
1	2	3	4	Budgeting For Nonprofit Operations	1	2	3	4
1	2	3	4	Community Outreach & Relationships	1	2	3	4
1	2	3	4	Crisis Intervention & Management	1	2	3	4
1	2	3	4	Facilities Oversight	1	2	3	4
1	2	3	4	Financial Administration	1	2	3	4
1	2	3	4	Fundraising & Development	1	2	3	4
1	2	3	4	Human Resources & Staff Relations	1	2	3	4
1	2	3	4	Government Grants Administration	1	2	3	4
1	2	3	4	Government Relations	1	2	3	4
1	2	3	4	Marketing & Communications	1	2	3	4
1	2	3	4	Nonprofit Organizational Assessment	1	2	3	4
1	2	3	4	Program Development, Delivery				
1	2	3	4	 And Evaluation	1	2	3	4
1	2	3	4	Self-Administration	1	2	3	4
1	2	3	4	Strategic Planning for Nonprofits	1	2	3	4
1	2	3	4	Use of Technology & Social Media	1	2	3	4

Other Experiences Important To Factor: _____

FOR INTERIM DEVELOPMENT DIRECTORS:

<u>EXPERIENCE</u>					<u>EFFECTIVENESS</u>			
1	2	3	4	Annual Giving	1	2	3	4
1	2	3	4	Auxiliaries and Guilds	1	2	3	4
1	2	3	4	Board Fundraising	1	2	3	4
1	2	3	4	Case for Giving Creation & Use	1	2	3	4
1	2	3	4	Contributor Prospecting & Research	1	2	3	4
1	2	3	4	Foundation Relations	1	2	3	4
1	2	3	4	Fund Development Program Evaluation	1	2	3	4
1	2	3	4	Fund Development Staff Management	1	2	3	4
1	2	3	4	Fund Development Volunteer				
1	2	3	4	 Committees	1	2	3	4
1	2	3	4	Grant Research & Composition	1	2	3	4
1	2	3	4	Major and/or Mega Gifts Fundraising	1	2	3	4
1	2	3	4	Planned Giving	1	2	3	4
1	2	3	4	Special Events Coordination	1	2	3	4
1	2	3	4	Strategic Planning for Fundraising	1	2	3	4
1	2	3	4	Use of Technology & Social Media				
1	2	3	4	 In Fundraising/Online Giving	1	2	3	4

Other Experiences Important To Factor: _____

UNDERSTANDING & APPLICATION OF INTERIM EXECUTIVE DELIVERABLES

The Third Sector Company requires of all of its licensees, a set of deliverables that represent what we believe are core competencies associated with quality interim executive management. At this point, please rate your experience and comfort level in demonstrating these competencies:

<u>EXPERIENCE</u>					<u>CURRENT COMFORT LEVEL</u>			
1	2	3	4	Conducting An Operational Assessment	1	2	3	4
1	2	3	4	Introducing Succession Planning Policy Creation & Use of Management Dashboards	1	2	3	4
1	2	3	4	Incremental Workplan Development	1	2	3	4
1	2	3	4	Day-To-Day Nonprofit Operations	1	2	3	4
1	2	3	4	Executive Search Committee Support	1	2	3	4
1	2	3	4	Acting As A Peer Mentor To Another Nonprofit Executive	1	2	3	4

SELF-AWARENESS OF INTERIM SERVICE & THIRD SECTOR INVOLVEMENT

As you consider the optimal interim executive engagement opportunity, please indicate with either a “yes” or “no” the following situations:

LOCATION OF SERVICE

How far would you be willing to travel to perform on-site interim executive work?

- Less than 10 miles from my home
- Less than 20 miles from my home
- Less than 30 miles from my home
- Over 30 miles from my home

DURATION OF SERVICE

How long would you be willing to occupy an Interim executive position?

- Up to six months
- Up to one year
- Up to eighteen months
- Up to two years

HOURS OF SERVICE

How many hours per week are you willing to occupy an interim executive position?

- Up to 16 hours (two days per week)
- Up to 24 hours (three days per week)
- Up to 32 hours (four days per week)
- Up to 40 hours (five days per week)

SPECIALIZED SERVICES

Do you have specific experience or an interest in any of the following situations that often call for interim executive management?

- Closing a nonprofit and dissolving the corporation
- Leading a merger or acquisition process
- Leading a nonprofit during bankruptcy
- Serving as a first-time executive for a formerly all-volunteer organization
- Acting as a chief operating officer rather than a chief executive officer
- Leading a nonprofit in litigation

THIRD SECTOR (TSC) INTERESTS

As a member of a team of licensed interim executives, in which of the activities are you interested in learning more about or participating?

- Representing TSC as a sponsored member of a professional or trade association.
- Representing TSC to a potential client as an additional source of income.
- Volunteering to teach or present a succession planning workshop.
- Assisting in the development of the organization.

In what specific areas should Third Sector provide training that will be of specific interest, or of professional value, to you as you pursue a career in nonprofit interim executive management? _____

SPECIAL CONSIDERATIONS FOR PRIVATE CONSULTANTS

While a professional interim executive, you may consider or currently have a private consulting practice. It is never the intention of Third Sector Company to compete with its own licensees for similar business.

1. Do you currently have a private consulting practice? _____ YES _____ NO
2. If so, how long have you been in private practice? _____ YEARS
3. Is Interim Executive Management currently a service that you advertise as part of your consulting practice?
 _____ YES _____ NO
4. What do you consider as the consulting specialties of your consulting practice?

Listed In Priority and Ranking Order

1. _____
2. _____
3. _____
4. _____
5. _____

5. Is your ultimate goal to:
 - _____ reduce current client load and consulting practice
 - _____ maintain current client load and consulting practice
 - _____ increase current client load and consulting practice
 - _____ get out of private consulting practice and work in a different income-generating environment
6. How can a relationship with Third Sector Company and the practice of interim executive management, succession planning consultation, and leadership continuity services for the nonprofit sector help you to achieve your ultimate goals?

CONCLUSIONS

Based on my responses to all of the answers that have been asked, I draw the following conclusion about my potential career in nonprofit interim executive management and licensure by and participation in Third Sector Company to further my career in nonprofit leadership continuity service delivery:
