

## THE MANAGEMENT BUCKETS SELF-ASSESSMENT TOOL

**EVERY NONPROFIT CEO** and senior leader has unique strengths and competencies in many “management buckets” – but rarely does one person score high in all 20 buckets. The *MANAGEMENT BUCKETS WORKSHOP EXPERIENCE*, presented by John Pearson Associates, Inc., helps leaders identify their strengths and weaknesses—and create a practical action plan to build the organization around their strengths, but not neglect areas outside their passion.

Leaders (and their direct reports) must avoid the Head-in-Sand Syndrome and make a frank self-assessment of what level they’re at in each of the 100 Knowledge Management Core Competencies of the 20 Management Buckets.

### MOVING FROM THE “HEAD-IN-SAND SYNDROME” TO THE “GOOD TO GREAT SYSTEM”

<b>Level 1</b>	<b>Red</b>	I don't know what I don't know.
<b>Level 2</b>	<b>Yellow</b>	I know what I don't know.
<b>Level 3</b>	<b>Green</b>	I have an action plan to address what I know I don't know.
<b>Level 4</b>	<b>Blue</b>	I am knowledgeable and effective in this Core Competency.

<b>THE MANAGEMENT BUCKETS SELF-ASSESSMENT TOOL</b> Here are just 20 of the 100 core competencies. <b>Check <input checked="" type="checkbox"/> where you're at today:</b>	<b>Level 1 RED</b>	<b>Level 2 YELLOW</b>	<b>Level 3 GREEN</b>	<b>Level 4 BLUE</b>
1. <b>THE BOARD BUCKET.</b> A nominee to the board of directors asks if you use the Carver Policy Governance model—and whether or not you have a Board Standing Policies Manual.				
2. <b>THE BOOK BUCKET.</b> A direct report is an extreme micromanager. What book should she read this week and what training should you recommend to her?				
3. <b>THE BUDGET BUCKET.</b> A new board treasurer wants to change your financial reporting format. What are the best practices recommended by ECFA and other organizations?				
4. <b>THE CRISIS BUCKET.</b> Yikes! A key team member just had a severe moral failure. What should you do in the first 24 hours?				
5. <b>THE CULTURE BUCKET.</b> A candidate for a VP position wants to interview your management team to better understand your “culture” and “core values.” Will they all say the same thing?				
6. <b>THE CUSTOMER BUCKET.</b> There is disagreement between your board and staff regarding your primary customer vs. your secondary customers. What are the five key questions every nonprofit organization must answer?				
7. <b>THE DELEGATION BUCKET.</b> A board member observes that you tend to be weak on delegation. Whether she is correct or not, outline what your next steps will be.				
8. <b>THE DONOR BUCKET.</b> Only half of your board members are generous givers to your organization. What are the best practices other CEOs employ to foster generous giving?				
9. <b>THE DRUCKER BUCKET.</b> Give a brief review of at least two books you've read by Peter Drucker, the father of modern management—and discuss one Druckerism that has helped you become a more effective executive.				
10. <b>THE HOOPLA BUCKET.</b> A valued team member comments that the unrelenting pressure and deadlines have created a tense work environment. How do you fix this?				
11. <b>THE MEETINGS BUCKET.</b> Patrick Lencioni's book, <i>Death By Meeting</i> , suggests every team should have four kinds of meetings. What are they?				



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12. <b>THE OPERATIONS BUCKET.</b> A new team member has been chastised every day for five days for "not following procedure." What's wrong—and what are the likely solutions?				
13. <b>THE PEOPLE BUCKET.</b> According to researchers, there are four basic "social styles," yet most leaders operate as if there's only one "right one"—their own! What are the four and what implication do they have for donors, customers, board members, volunteers, staff, family, spouses, etc.?				
14. <b>THE PRINTING BUCKET.</b> Yikes! The newsletter was just mailed to 10,000 people and there is an embarrassing typo and the annual banquet date is wrong. What are your short-term and long-term solutions to this systemic problem?				
15. <b>THE PRODUCT BUCKET.</b> Peter Drucker said you must "slough off yesterday." Explain the law of diminishing returns and how it impacts your top five programs, products or services.				
16. <b>THE RESULTS BUCKET.</b> Every CEO, senior leader and virtually every staff member should have 3 to 10 written "Standards of Performance." Explain how this works in your organization. Extra credit: Discuss "S.M.A.R.T." goals.				
17. <b>THE STRATEGY BUCKET.</b> A well-liked CEO of another organization just got fired. They were growing, but apparently lacked a strategic plan. What are the key elements in the strategic planning process?				
18. <b>THE SYSTEMS BUCKET.</b> You're good at launching new programs, but weak on bringing them to the finish line. The discipline of project management requires what competencies?				
19. <b>THE TEAM BUCKET.</b> A best-selling book describes " <i>The Five Dysfunctions of a Team</i> ." What are they?				
20. <b>THE VOLUNTEER BUCKET.</b> A trusted volunteer (and generous giver) complains to you that volunteers are "second class citizens" in your organization. What are some of the best practices today in 21 <sup>st</sup> century volunteer management?				
<b>ADD UP YOUR SCORE →</b>				

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### YOUR SELF-ASSESSMENT:

**Add up** your **Red** and **Yellow** score: \_\_\_\_\_. What are your next steps on each of these?

**Who is** holding you accountable for your **Green** action plans? What are the target dates?

**Are you** consistently training others with your **Blue** core competencies?

