Talent Management Self-Assessment

Thank you for your interest in assessing your organization's talent management program. Over the last decade many important steps have been taken to advance the fund development profession and the donor base is savvier than ever. Today donors expect more from the organizations they support. They look to the organization's leadership as a measure of how their gifts will be stewarded. Couple these elevated donor expectations with an expansive nonprofit sector (over 1.5 million non-profits in the US alone) and it's easy to see why the market for recruiting and retaining talent is highly competitive.

Additionally, high employee turnover rates can be detrimental to an organization's fundraising success. High turnover rates can ultimately be more expensive for an organization than investing in a strong talent management program.

The following self-assessment is a quick way to survey your current talent management strategies and pinpoint where opportunities lie to strengthen your program.

Instructions:

Under each section, rate your organization on a five-point scaling system using the following descriptors as your guide:

5 = Strongly Agree
4 = Agree
3 = Neutral
2 = Disagree
1 = Strongly Disagree

Add up each rating to arrive at a final total score. You can chose to assess and score each section independently or at the end cumulatively rate your overall talent management program.

Section One: Recruiting
5 = Strongly Agree | 4 = Agree | 3 = Neutral | 2 = Disagree | 1 = Strongly Disagree

___ Our organization values continual recruitment, regardless of whether or not there are current openings.

___ Everyone in our organization contributes to recruitment.

___ Our team keeps a talent roster of both interested and wish-list candidates for future opportunities.

___ Our team has adopted common language about what it means to work for our organization.

___ Job postings are compelling and promote the opportunity a new leader or colleague can have in helping to advance the mission of the organization rather than just listing desired qualifications and responsibilities.

___ We understand candidates are interviewing our organization as much as we are interviewing the candidates.

___ We have a systematic approach to interviewing and communicating with candidates throughout the process.

___ Our interview questions ask about candidate's past and professional experiences, and help set expectations.

___ We have developed an effective line of questioning that leads to successful hires.

___ We value and expect transparency, respect and honesty throughout the recruitment process.

___ We have an organized system for communicating with candidates throughout the interview process.

___ Our entire team represents the organization at the highest level throughout the recruitment process.

Scoring:

48 – 60	*Highly Effective Recruitment Program*
36 – 47	*Strong Recruitment Program with Some Room for Improvement*
24 – 35	*Average Recruitment Program with Lots of Room for Improvement*
0 – 23	*Ineffective Program with Great Risk of Employee Turnover*

Your Score: _____

Section Two: Onboarding*
5 = Strongly Agree | 4 = Agree | 3 = Neutral | 2 = Disagree | 1 = Strongly Disagree

*New Employee Orientation: the process through which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members and insiders.

___ Our organization has a strong onboarding program.

___ Our organization invests enough time and resources in onboarding new colleagues.

___ New colleagues who go through our onboarding program seem to have more success in their work than those colleagues who have not had onboarding experiences.

___ Everyone on the team is responsible for and plays a role in onboarding the new colleague.

___ Onboarding goals and expectations are clearly outlined for internal staff.

___ Onboarding goals and expectations are clearly outlined for new colleagues.

___ Onboarding goals and expectations align with our evaluation process.

___ New colleagues are personally introduced to the team's leadership, their peers and key stakeholders to the organization within the first few weeks of their hire date.

___ A mentor or ambassador is assigned to the new colleague to smooth the transition.

___ A reference binder or other informational tools are provided to new colleagues to help them be successful in their new roles.

___ At the end of a new colleague's onboarding experience, we spend time collecting feedback on their experience to help inform us of onboarding effectiveness and if adjustments to the program are needed.

___ We have a process to continually update and refine our onboarding program to ensure information shared is timely and relevant.

Scoring:

48 – 60	*Highly Effective Recruitment Program*
36 – 47	*Strong Recruitment Program with Some Room for Improvement*
24 – 35	*Average Recruitment Program with Lots of Room for Improvement*
0 – 23	*Ineffective Program with Great Risk of Employee Turnover*

Your Score: _____

Section Three: Retention
5 = Strongly Agree | 4 = Agree | 3 = Neutral | 2 = Disagree | 1 = Strongly Disagree

___ We consider retention when making hiring decisions.

___ Employees are loyal to and stay with the organization long-term.

___ Our organization's salary and benefits are competitive in comparison to peer organizations.

___ Job descriptions accurately and clearly outline the role, responsibilities and expectations for the positions on our team.

___ Management regularly discusses career goals and trajectories with staff.

___ Our organization is committed to conducting annual evaluations/performance reviews.

___ Annual evaluations/performance reviews are a time to acknowledge past accomplishments, discuss professional development goals and set future expectations.

___ Our organization budgets for and invests in the professional development of our staff.

___ Our team regularly celebrates successes, expresses gratitude and discusses the impact of our work.

___ Our team supports each other when we do not achieve our goals and works collaboratively to improve future performance.

___ We have deployed retention strategies (flexible schedules, time off for volunteer work, access to technology, etc.) beyond salary and benefits to improve employee satisfaction, work-life balance and loyalty.

___ Leadership regularly asks employees for feedback on job satisfaction, effectiveness of deployed retention strategies and suggestions for improvement.

Scoring:

48 – 60   *Highly Effective Retention Program*

36 – 47   *Strong Retention Program with Some Room for Improvement*

24 – 35   *Average Retention Program with Lots of Room for Improvement*

0 – 23   *Ineffective Program with Great Risk of Employee Turnover*

Your Score: _____

Cumulative Assessment Scoring

144 – 180   *Highly Effective Continuum of Talent Management*

108 – 141   *Strong Continuum of Talent Management*

72 – 105   *Average Continuum of Talent Management*

0 – 69   *Ineffective Continuum of Talent Management, High Employee Turnover Rates Likely*

Your Cumulative Score: _____

Among a nonprofit's most valuable resources are its people. Through our Talent Management services, we can help your organization find, attract, hire, onboard, train and retain quality candidates that help you build high-performing teams.

To learn more about our Talent Management Services, please contact Dave Malone at 608.516.2496 or dmalone@mcdonaldschaefer.com.

McDonald Schaefer welcomes the opportunity to partner with you to build a highly effective talent management program.