

MANAGEMENT AND LEADERSHIP IQ®

Read the following questions and answer each one as honestly as you can.

Score	Criteria
1	Almost always, completed or I strongly agree
2	Most of the time, almost complete or I mostly agree
3	50% of the time, underway or I agree somewhat
4	Most often not, thinking about it or I mostly disagree
5	Almost never, don't plan to do or I strongly disagree

SECTION ONE: PLANNING	SCORE
We have written mission and vision statement for my department that is known to, and accepted by, my supervisor and my entire staff.	
Strategic and tactical annual plans for my department are written and updated regularly.	
I use our written plans as a dynamic management tool.	
Everyone in my department is involved in planning.	
In our planning, we consider the needs of our constituents, what they consider value, the market, trends, our strengths and our weaknesses.	
Action steps, due dates, milestones, lead person for each, and costs are included in all plans.	
Our plan has measurable goals and objectives tied to institutional priorities.	
My team can articulate our shared values, philanthropy and management philosophy.	
My department's mission, vision, values, goals, objectives, and anticipated outcomes are in response to our institution's mission, vision, values and goals.	
We listen to our constituents through surveys, and personal conversations	
TOTAL FOR SECTION	

SECTION TWO: ORGANIZING	SCORE
The systems we have in place for managing all aspects of my department are effective, user-friendly, and accessible to all members of the team.	
We have written policies and procedures for all appropriate functions within my department.	
The structure of my department facilitates communication and work flow for staff and volunteers (if applicable).	
There are no dual-reporting or dotted line reporting situations within my control.	
My department is effectively organized for maximum productivity.	
I provide or secure the resources my team needs for success. I regularly inquire what is needed.	
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SECTION THREE: STAFFING	SCORE
Every member of my department has an accurate, written job description.	
Everyone in my department has a clear set of expectations. Each knows what it will take to get an "A" at evaluation time.	
When hiring, I consider my department's needs in terms of skills, abilities, competencies, personality types and compatibility.	
I try not to hire people who are just like me but rather try to "balance my act."	
The average length of service in my department is more than two years.	
My first consideration when looking for a new hire is promoting from within.	
I use scenarios and open-ended questions when interviewing candidates.	
I use scenarios and open-ended questions when checking references.	
I provide all interviewers with specific goals for their interview and provide a template for feedback	
We have a strong, effective, department-specific orientation program for new employees.	
Upon hiring a new employee, I consider areas of strength and challenges in tailoring his or her orientation and on-going staff development.	
Every member of my department took part in one or more staff development activities during the last year.	
There is a mutually agreed upon staff development plan for each member of my department.	
I provide regular, informal feedback to my staff.	
I formally evaluate each member of my staff, annually or semi-annually.	
Each member of my staff provides me, on an annual or semi annual basis, a written self-evaluation.	
I understand the role of discipline when serious, avoidable mistakes have been made.	
I document serious breeches.	
When providing negative feedback, I describe the unacceptable behavior rather than use judgmental terms.	
I embrace and value diversity in people (including culture, race, gender, age)	
I establish clear expectations, and hold myself and my team accountable.	
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SECTION FOUR: LEADING & BUILDING PRODUCTIVE RELATIONSHIPS	SCORE
We have a written vision statement for my department that was developed with input from my team and accepted by my supervisor and entire staff	
Our vision is a compelling, outcome driven, statement articulating where we are going, by when, and what our department will look like and be achieving when we get there.	
We discuss ethics as a regular part of staff meetings, and/or staff development.	
I demonstrate integrity at all times; I hold myself to the highest ethical standards.	
I stand up for what I believe; I stand up for my team; I stand up for our department and institution.	
I flex my leadership style based on the situation and the staff members' experience, competence and level of commitment.	
I believe I demonstrate humility; I am open to criticism, learning constantly, willing to admit mistakes, and learning from them.	
I separate praise from discussions of what we can do better next time.	
I know what makes each member of my staff feel rewarded for work well done.	
Considered risk is encouraged in my department.	
I model the behaviors I seek.	
We focus on execution, always meeting our "customer's" expectations.	
Our structure encourages communication and simplifies our work.	
I develop productive, collaborative and strategic alliances for my department	
I look for opportunities for innovation and encourage my staff to do the same.	
I am a good listener, rarely interrupting, losing focus or judging as the other speaks; I speak only 30% of the time in any given conversation	
I communicate clearly and effectively verbally and in writing.	
I am open to other people's ideas and encourage them.	
Our focus is on the mission, vision, and goals of the institution and the needs and aspirations of our constituents.	
I pay attention to long-term as well as short-term issues and goals.	
I create an environment where staff members focus on the larger good of the institution and the people we serve.	
I demonstrate empathy in all my dealings with others; I can put myself in their place and see things from their points of view.	
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SECTION FIVE: MONITORING AND REPORTING	SCORE
I know what is going on within my department.	
My staff keeps me informed appropriately through regular written and verbal reports.	
I invest time and energy in developing and communicating our department's strategy with the team, my supervisor, and volunteer leaders.	
I've made it clear what I need to know and what I don't need to know prior to, during and after decision-making.	
We have unyielding performance measures and tie reward to performance.	
I keep my department informed about institutional news, priorities, policies, and anticipated changes.	
My supervisor, peers, and volunteers know about the good work of my department and of individual staff members' and/or teams'.	
Using my department's plans, we report on progress against goals on a minimum of a quarterly basis to my supervisor and if appropriate to leadership volunteers.	
Every staff member knows how to report, what to report and when such reporting is due.	
I keep my supervisor appropriately informed on a regular basis.	
TOTAL FOR SECTION	

SECTION SIX: DELEGATING	SCORE
My staff feels empowered to make decisions on their own.	
When I delegate, I match individual competencies, skills, abilities, and strengths with the task requirements.	
I set clear, measurable objectives for the delegate to meet.	
Once I've delegated, I give my staff member or team the time, space, and resources needed to complete the task.	
I do not micro-manage; staff members would agree.	
If something goes wrong or the delegate has many questions, I do not take back the task; rather I use it as a learning opportunity.	
Together, we agree on milestones and due dates to keep the task or project on track.	
I follow the progress of the assignment without intruding.	
I conduct a post-project or task feedback or evaluation discussion.	
When I delegate, I delegate both responsibility and authority.	
I believe my job is to help others solve their own problems and make their own decisions. I empower my staff to do so and reward such behavior.	
TOTAL FOR SECTION	

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SECTION SEVEN: PRIORITY SETTING, PROBLEM SOLVING & DECISION MAKING	SCORE
I spend 80% or more of my time on things that are either urgent and important or important although not urgent.	
When making decisions I/we consider a variety of options and weigh the risks and benefits of each before deciding.	
I have my top three to five priorities written down and review them regularly.	
My supervisor agrees with my list of priorities.	
My staff is clear about the order of priority for their assignments.	
I never say or imply that, "everything is a top priority" or "we just have to get it all done," in answer to a legitimate priority-setting question or complaint from a staff member.	
I anticipate crises and plan accordingly.	
I believe employees closest to the problems best solve problems.	
When resolving conflicts, I try to understand all points of view by asking questions, listening, and not assuming.	
When resolving conflicts, I do not assign blame.	
I recognize that conflict always has more than one contributor no matter how large or small the contributions.	
I effectively balance my management responsibilities and my responsibilities as an individual member of the team and/or department.	
I manage my time and energy effectively.	
TOTAL FOR SECTION	

SECTION EIGHT: PERSONAL CARE	SCORE
I empower my team to achieve a good work/life balance.	
I am accessible and approachable.	
I effectively balance my work life with family, friends, and outside pursuits.	
I work on average no more than 55 hours per week.	
I enjoy a network of colleagues on whom I call on with some regularity.	
I take care of my self physically, emotionally and spiritually.	
I effectively manage my negative stress.	
I enjoy my work.	
I am self-aware and take time for personal assessment; I know my strengths, weaknesses, blind spots, values, needs and aspirations.	
I laugh aloud at least once a day.	
I invest in my own professional development.	
TOTAL FOR SECTION	

MANAGEMENT AND LEADERSHIP IQ SCORING	
ONE: PLANNING	
TWO: ORGANIZING	
THREE: STAFFING	
FOUR: LEADING & BUILDING RELATIONSHIPS	
FIVE: MONITORING & REPORTING	
SIX: DELEGATING	
SEVEN: PRIORITY SETTING	
EIGHT: PERSONAL CARE	
TOTAL SCORE:	

Look at those areas where you scored three or more.

- Check with a trusted staff member, peer, or colleague.
- Ask questions and listen so you understand the issues.
- When making an improvement plan, focus on what is most important and achievable.

106 to 212 – Your management and leadership IQ is excellent. Look to those few items that need attention and make a plan to work on them.

213 to 318 – You are doing well but take care. Some areas need your attention. Look them over carefully and make a plan for learning more and improving.

319 to 424 – Clearly, you have many things to work on. Consider a mentor and/or some classes. Choose four or five high impact areas to get started. Set milestones. Monitor your progress. Reward your successes.

More than 424 – You might want to consider a different job, one better suited to your skills, competencies, and areas of interest.

If you would like to learn more about managing and leading call us at 914 428-7777 or email us at mail@theosbornegroup.com

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