



Your next step: Map out your organization's future needs

Collaborating to accelerate social impact

Conducting a Future Needs Assessment

- This template accompanies the [Understanding Future Needs video](#)
- Before you ask how your leadership team will change over time, you should consider how your strategy will change, and ask what skills are required to live into that strategy
 - 1 -Identify 1 key **strategic shift** your organization will make in the next 3-5 years What will it take to do that well?
 - 2 -How will the **day-to-day work** of leaders change to support this shift?
 - 3 -What are the **skills**, knowledge, and experience required to do that day-to-day work?
- Once you identify those critical skills, map them to specific positions Will you need to create a new role? Or can you just change an existing role?

For more resources, examples, and information visit:
www.bridgespan.org/leadershiptoolkit

Example: YMCA's collaboration with for-profit insurers

Identify skills, knowledge, traits

STRATEGIC SHIFT: YMCA is partnering with for-profit insurers to deliver and be reimbursed for outcomes of participants enrolled in YMCA's diabetes prevention program (DPP)

1

What it takes to do well

- Determining which insurers to work with
- Selling partnership to insurers
- Work with insurers and clients to engage them in the program
- Co-marketing and co-selling with insurers
 - Work collaboratively with other initiative leadership

2

Day-to-day work behaviors

- Analyzing markets
- Identifying most attractive partners
- Developing and delivering compelling "pitches" that address for-profit motives
- Identifying and executing opportunities to bring in traffic
- (NOTE: These are only a subset of key behaviors required)

3

Skills, knowledge, experience

- Skills: analytical skills, sales "pitch" skills
- Knowledge: know for-profit motivations, culture, ways of working; know partner's industry & business model, know business development processes and approaches

Example: What were the **new** capabilities needed for the DPP program to be successful?

Map those skills, knowledge, and traits to specific positions

Leadership position

- *These attributes are currently shared across several roles in the organization and have not yet been formally assigned to a particular role or roles*

- ...

New skills, knowledge, and experience? *(from previous page)*

- Skills: “sales-pitch” skills
- Knowledge: know for-profit motivations, culture, way of working
- Knowledge: know partner’s industry & business model (specifically, private insurers)

- ...

- ...

- ...

Template: What are the capabilities needed for the change in your organization?

Identify skills, knowledge, traits

For each strategic initiative or business model change:



• XX	• XX	• XXX
• XX	• XX	• XXX
• XX	• XX	• XXX

Template: What are the **new capabilities** needed for the change in your organization?

Map those skills, knowledge, and traits to specific positions

Leadership position

New skills, knowledge, and experience?
(from previous page)

• ...

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If you have numerous new behaviors without a clear position assigned to them, you should consider creating a new position.