PROGRESSING IN
LEADERSHIP
INVENTORY

WESTFALL
EXECUTIVE ADVISORS

New roles entail fresh challenges, new levels of satisfaction, and numerous opportunities for skill development and professional growth.

The Progressing in Leadership Inventory (PLI) helps to assess your clarity about the expectations of and your preparation for new roles across common domains of progressive organizational leadership.

The goal of the PLI is to identify areas of existing strength and areas for additional learning as you prepare for a new role. Ideally, this information will inform your individual professional development planning.

Using a 4-point scale (1 = low, 4 = high), rate your clarity about the requirements of your new position and your level of preparation.

- "Clarity of requirements" refers to how well you understand what a new position will require of you in terms of specific skills, knowledge, responsibility, and time. If you have very little clarity, indicate that with a 1. If you have great clarity, indicate that with a 4.

- "Preparation" refers to your current readiness to fulfill the requirements of the new position. This might include your existing experience, knowledge gained from reading or talking with others, and other professional development activities. If you have very little preparation, indicate that with a 1. If you have a great deal of preparation, indicate that with a 4.

Skip items that are not relevant to your position.

A helpful way to complete the PLI is to ask the following question as you rate each item: **What will the next role require in terms of …:**

Communication Skills	Clarity of Requirements	Preparation
Interpersonal		
Group		
Written		
Verbal		
Public speaking		

Communication Skills (continued)

	Clarity of Requirements	Preparation
With multiple audiences:		
Internal — students, faculty, staff, administrators, board	☐	☐
External — families, media, alumni, public	☐	☐
People senior to your position	☐	☐
People junior to your position	☐	☐

Professional Relationships

	Clarity of Requirements	Preparation
With supervisor	☐	☐
With positional peers	☐	☐
With direct reports and staff	☐	☐
With people/roles junior to your position across the institution	☐	☐
With people/roles senior to your position across the institution	☐	☐
With board members, if applicable	☐	☐

Responsibility and Authority

	Clarity of Requirements	Preparation
Authority for individual decisions	☐	☐
Responsibility in group decisions	☐	☐
Role in shared governance processes	☐	☐
Autonomy of role in context of larger organizational division/unit	☐	☐
Autonomy in direction-setting for areas in role's portfolio	☐	☐
Responsibility for information-sharing	☐	☐
Responsibility for employment-related matters	☐	☐

Supervision and Lead Roles	Clarity of Requirements	Preparation
Number of direct reports	☐	☐
Size of direct report operations/staff	☐	☐
Leadership of standing groups/committees	☐	☐
Leadership of ad hoc groups/committees	☐	☐
Time commitment for supervision and lead roles	☐	☐

Collaboration and Working With Others		
With individuals	☐	☐
With formal groups and committees	☐	☐
With informal groups	☐	☐
With internal constituencies — students, faculty, staff, administrators	☐	☐
With external constituencies — families, alumni, donors, local community, institutional consortia and conferences	☐	☐

Liability and Risk Management		
Divisional/unit-level compliance knowledge and practices	☐	☐
Institutional compliance knowledge and practices	☐	☐
External regulatory knowledge and requirements	☐	☐
Emerging risk management issues	☐	☐

Public and Leadership Presence		
Expectations for your presence/participation in institutional events	☐	☐

Public and Leadership Presence (continued)	**Clarity of Requirements**	**Preparation**
Expectations for your presence/participation in community events	☐	☐
Understanding of your role's symbolic importance:		
Internally	☐	☐
Externally	☐	☐
Access to you beyond typical hours and expectations, and by whom	☐	☐

Institutional Knowledge and Perspective

	Clarity of Requirements	**Preparation**
Existing institutional strengths	☐	☐
Knowledge of other functional areas	☐	☐
The main challenges facing the institution	☐	☐
What will strengthen the institution overall	☐	☐
Important people at the institution or connected to the institution	☐	☐

Other Areas Relevant to Your Position:

What are your five areas of greatest clarity and preparation, as indicated by ratings of 4?

What are your five areas for the greatest learning and exploration, as indicated by ratings of 1 to 2? What three of these areas are most urgent and important?

What are your initial thoughts about/plans for addressing the urgent and important areas for learning?