

# Organizational Sustainability Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (yes), partially true (part), not at all true (no), or you don't know (DK)?

<b>Business Model/Strategy</b>	Our organization has a solid business model (what we do and how we pay for it) that has at least 5-7 years of life in front of it and is built on quality services/products that are needed by clients and valued by donors/funders.	Yes	Part	No	DK
	Our strategic or long-range plan (or business/organization strategy) is current and relevant to today's and tomorrow's market conditions. Progress toward the plan is frequently reviewed and is the subject of priority-setting discussions.	Yes	Part	No	DK
	Among the board, executive and management team there's a high degree of alignment about the direction and strategy.	Yes	Part	No	DK
<b>Leadership</b>	We have the staff and board leadership in place who meet our present and near-term future leadership needs.	Yes	Part	No	DK
	We have written succession plans in place for all key employees that include cross training plans. We have a strategy in place to recruit, develop and deploy new leaders, both staff and board.	Yes	Part	No	DK
	Our chief executive could go on a six-month sabbatical tomorrow and the organization would not miss a beat.	Yes	Part	No	DK
	Our board is a high-value asset to the organization. Processes are in place and followed for orientation of new board members and we have a pipeline of leaders and a process for board officer succession.	Yes	Part	No	DK
<b>Resources</b>	Our organization has sufficient financial resources to meet its commitments in the short to mid-term.	Yes	Part	No	DK
	Our organization's funding or revenue streams have longevity – the majority are likely to continue beyond the current year's budget or current grant cycle. We have an appropriate degree of diversification of revenue streams.	Yes	Part	No	DK
	A proactive resource development strategy is in place that is tuned to our organization's particular market – the present market as well as future market. There is a clear logical link between our revenue development strategy and our overall business/organization strategy.	Yes	Part	No	DK
	We are good stewards of ALL of the organization's assets, financial assets as well as "soft and social capital," the strengths that underpin the organization's work, such as community reputation, human capital, team capital, systems and processes, intellectual property, etc.	Yes	Part	No	DK
<b>Culture</b>	Our organization's culture could be described as resilient, forward-focused, results-oriented and action-based.	Yes	Part	No	DK
	The value and worth of the organization is widely understood throughout the board, staff and volunteers. Virtually anyone on the team could make a compelling case for supporting the organization.	Yes	Part	No	DK

# Succession Planning Mini-Assessment

Please read the following questions and note your response. As it applies to your organization, is this statement completely true (yes), partially true (part) not true at all (no) or you don't know (DK)?

<b>Emergency Backup Plan for Executive Director/CEO</b>				
Our organization has a written emergency backup plan for the chief executive.	Yes	Part	No	DK
This plan includes a designated first and second backup to stand in for the chief executive in case of an unplanned absence.	Yes	Part	No	DK
There is a cross training plan to prepare the first and second backups for assuming the chief executive's key duties.	Yes	Part	No	DK
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the chief executive.	Yes	Part	No	DK

<b>Emergency Backup for Senior Managers/Key Managers or Staff</b>				
Our organization has a written emergency backup plan for senior managers/key staff.	Yes	Part	No	DK
This plan includes a designated first and second backup to stand in for the senior manager/key staff person in case of an unplanned absence.	Yes	Part	No	DK
There is a cross training plan to prepare the first and second backups for assuming the senior manager/staff person's key duties.	Yes	Part	No	DK
There is a communication plan which describes who needs to know when and by whom in case of unplanned absence of the senior manager/key staff person.	Yes	Part	No	DK

<b>Succession Policy</b>				
Our organization has a written succession policy to guide how the Board will fill the opening in a planned chief executive transition.	Yes	Part	No	DK
This policy states how the Transition and Search Committee is comprised and the role of the Committee.	Yes	Part	No	DK
This policy addresses how we will handle internal candidates and what kind of search we will do to find candidates.	Yes	Part	No	DK
This policy states our commitment to diversity and inclusiveness in our recruiting and hiring.	Yes	Part	No	DK

<b>Other Helpful Actions</b>				
Our organization regularly reviews and updates position descriptions.	Yes	Part	No	DK
Our organization routinely reviews bench strength against key competencies and functions.	Yes	Part	No	DK
Our organization unpacks jobs to make sure they have not become undoable by anyone other than current person in the position.	Yes	Part	No	DK
Our organization has a comprehensive list of all passwords, bank accounts, IT information in one place with more than one person familiar with details.	Yes	Part	No	DK
Our organization routinely reviews our emergency backup plans and succession policy.	Yes	Part	No	DK