

Organizational Sustainability Checklist

Description	Yes	Underway	No	Comment
Purpose				
Strategic plan is in place and current				
The strategic plan is actively followed				
The mission statement is regularly reviewed for its relevance to current needs/population and inspiration				
Board Leadership				
The Board evaluates the Executive Director annually on performance and achievement of strategic goals				
The Board is satisfactorily performing its major governance jobs: financial oversight, executive support and oversight, strategic planning, fund raising, and being champions externally				
The entire Board is engaged in governance duties and a quorum is reached at every Board meeting				
The Board has a policy or plan for executive transition				
The Board has approved (and updates) an Emergency Succession Plan				
The Board understands the job of the Executive Director and his/her unique value to the organization				
Staff Leadership				
Leadership talent recruitment and development are aligned with organizational strategies				
Senior management functions as a high-performing team with a solid team culture				
Staff support one another, can lead the organization in the absence of the executive, and has the authority to carry out decisions within respective areas of responsibility				
Staff have professional development plans				
Staff have regular supervision				
Organization has a process for identifying and grooming staff into leadership positions				

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Partnerships				
Where appropriate, the organization has strong, effective partnerships and collaboration with other nonprofits, with clearly defined roles				
The organization has positive relationships with public officials and policy makers				
The organization has strong media contacts				
Another staff or board member, beyond the Executive Director, shares external relationships, with major donors, funders and community leaders				
Resources				
The organization is respected by its funders				
The organization has an up-to-date fund development plan				
The organization's funding stream is sufficiently diversified				
Donors have a relationship with organizational leaders beyond the Executive Director				
Culture				
The organization has an understanding and a culture of shared leadership and staff are given opportunities to step into leadership roles and activities				
The organization regularly assesses for structural inequities including equal employment opportunity, diversity and inclusion, and effective management practices				
Organization has ways to give its constituents a voice				
Operational Excellence - Systems				
Financial systems are strong: financial reports are up to date and provide the data the board and senior managers need				
An audit is conducted annually, with clean results				
Financial reserve is in place - at least 3 months operating capital				
An operations manual exists for key administrative systems, is easily accessible and up to date				
The organizational shortcomings are identified, shared with the Board, and have a plan to address them.				

Description	Yes	Underway	No	Comment
Operational Excellence - Staff				
All staff have up-to-date job descriptions				
Senior program and administrative staff have captured their key processes and trained others to conduct duties in an emergency				