



Organizational Sustainability Checklist

Description	Yes	In Part/ Under- way	No	Priority/ Comment
Purpose				
Strategic plan is in place and is actively followed				
The mission statement is regularly reviewed for relevance and inspiration				
The organizational shortcomings are identified and we have a plan to address them				
Leadership, by the Board				
Board evaluates the Executive Director annually on performance and achievement of strategic goals				
Board is satisfactorily performing its major governance jobs: financial oversight, executive support and oversight, strategic planning				
The entire Board is engaged in governance duties and a quorum is reached at every Board meeting				
The Board has designated funds for executive severance				
Leadership, by the Staff				
Leadership talent recruitment and development are aligned with organizational strategies				
Senior management functions as a high-performing team: solid team culture in which members support one another, can lead 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 and regular supervision				
The distinct job roles and responsibilities of senior staff are understood and in alignment with each other				
Organization has a process for identifying and grooming staff into leadership positions				
Emergency succession plan is in place				
Board has discussed the attributes unique to the Executive Director that will require replacement in a transition				

Partnerships				
The organization is known for strong, effective partnerships and collaboration with other nonprofits, with clear results				
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				
Culture				
Organization has an understanding and a culture of shared leadership				
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				
Operations manual exists for key administrative systems, is easily accessible and up to date				
Operational Excellence - Staff				
All staff have up-to-date job descriptions				
Senior program and administrative staff have documented the key processes and trained others to conduct duties in an emergency				

Adapted from CompassPoint Nonprofit Services

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