

ASSESSING THE RESILIENCY OF YOUR ORGANIZATION
2018 Fahe Annual Meeting

This tool helps you assess key factors associated with your organization’s resiliency, its ability to recover from adversity. These factors are expressed as statements organized within four broad categories: Leadership, Financial Health, Strategy and Culture. **(Statements in bold were created by the participants in our session at the annual meeting. Thanks for your contributions!)**

Rate each statement according to how true it is for your organization. A rating of “4” would mean the statement is extremely true, while a “1” would indicate the statement is extremely false. Please also write down any comments.

Compare responses with colleagues. Discuss and agree on the most important opportunities for improvement, and make specific plans for pursuing those improvements (see page 6).

LEADERSHIP: Purpose

1. The work of our organization is a direct expression of specific values we share in response to a significant community need.

1 2 3 4

COMMENTS:

2. We have a clear and concise mission statement that is relevant to current community needs and helps guide organizational decision-making.

1 2 3 4

COMMENTS:

LEADERSHIP: Board/Staff Partnership

3. There is clear understanding by our board, staff and volunteers about the difference between governance and operations, and those functions are distributed effectively within our organization.

1 2 3 4

COMMENTS:

4. Our board chair and chief executive communicate regularly and work effectively together.

1 2 3 4

COMMENTS:

5. Our board and chief executive agree on the goals to be pursued by the chief executive, and conduct a constructive annual review of performance against those goals.

1 2 3 4

COMMENTS:

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LEADERSHIP: Board

6. All board members actively participate in meetings and other functions on a regular basis and advocate for our organization's cause among supporters and other community stakeholders.

1 2 3 4

COMMENTS:

7. Board meetings include generative, strategic discussions about our organization's future.

1 2 3 4

COMMENTS:

8. Our board composition includes a mix of perspectives, skills and life experiences. That mix helps us better understand the needs of those we serve, and helps overcome the potential for unconscious biases in our decision-making.

1 2 3 4

COMMENTS:

9. Our board regularly assesses its performance, both as a governing body and as individual board members.

1 2 3 4

COMMENTS:

10. Our board sets aside time and resources to develop its members' governance and leadership skills.

1 2 3 4

COMMENTS:

LEADERSHIP: Continuity of Leadership

11. There's a demonstrated commitment to providing professional development for our staff members and volunteers. **(This includes cross-training to minimize the potential disruption of sudden vacancies.)**

1 2 3 4

COMMENTS:

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12. We use an ongoing performance review process that promotes clarity and communication about goals and expectations, and is intended to help our people be more successful in carrying out the organization's mission.

1 2 3 4

COMMENTS:

13. We have written plans for how to manage sudden vacancies in key positions should they occur.

1 2 3 4

COMMENTS:

14. We rigorously follow good human resources practices that protect our people and help them do their best work.

1 2 3 4

COMMENTS:

15. Essential organizational information is secure but also appropriately available to those who need it. Organizational systems and procedures are well-documented.

1 2 3 4

COMMENTS:

FINANCIAL HEALTH: Processes and Risk Management

16. There are people with strong nonprofit financial management skills on our staff and our board.

1 2 3 4

COMMENTS:

17. We create an annual budget which is approved by the board and monitored as the year goes on so operational adjustments can be made as needed to achieve the intended financial results.

1 2 3 4

COMMENTS:

18. The appropriate personnel, systems and procedures are in place to accurately manage all financial data and report the information we need for timely decision-making and compliance purposes.

1 2 3 4

COMMENTS:

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19. We regularly review our risk management strategies and maintain appropriate insurance policies.

1 2 3 4

COMMENTS

FINANCIAL HEALTH: Metrics

20. We maintain enough cash to cover six months of operating expenses.

1 2 3 4

COMMENTS:

21. Our ratio of current assets to current liabilities is at least 2:1.

1 2 3 4

COMMENTS:

22. **We have multiple funding streams across and within revenue categories.**

1 2 3 4

COMMENTS:

23. We consistently budget for, and achieve, an annual operating surplus (excluding extraordinary one-time events).

1 2 3 4

COMMENTS:

24. We understand the relative profitability of all our programs and activities, a calculation that includes their share of costs allocated from Administration and Fundraising.

1 2 3 4

COMMENTS:

STRATEGY

25. We have a long-range plan created with input from our board, staff and community stakeholders which provides a strategic framework for our work, and which we periodically review and adjust.

1 2 3 4

COMMENTS:

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26. We regularly assess the community's needs to ensure our mission remains relevant and focused on where it can make the most impact. **(This includes monitoring how community demographics are changing and analyzing the emerging needs of those demographic segments.)**

1 2 3 4

COMMENTS:

27. We regularly check the operating environment for factors that could threaten our organization. **(This includes anticipating and tracking policy developments that could impact our work.)**

1 2 3 4

COMMENTS:

28. **We create and nourish mutually beneficial partnerships to benefit our stakeholders, clients and communities.**

1 2 3 4

COMMENTS:

29. **Community members and other stakeholders know who we are and what we do.**

1 2 3 4

COMMENTS:

30. **We engage in social enterprise activities to generate revenue.**

1 2 3 4

COMMENTS:

CULTURE

31. Openness and transparency are practiced throughout our organization.

1 2 3 4

COMMENTS:

32. Our senior management actively seeks out the perspective and expertise of staff members.

1 2 3 4

COMMENTS:

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33. Silos are not a problem in our organization - we collaborate well across teams and departments.

1 2 3 4

COMMENTS:

34. We constantly try to find better ways to organize and perform our work.

1 2 3 4

COMMENTS:

35. We use mistakes and failures as learning opportunities.

1 2 3 4

COMMENTS:

36. We have a low rate of staff turnover, which translates to a high degree of organizational loyalty and institutional knowledge.

1 2 3 4

COMMENTS:

SUMMARY NOTES

General Observations

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Key Issues to Address

Next Steps (What, Who, By When)

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