

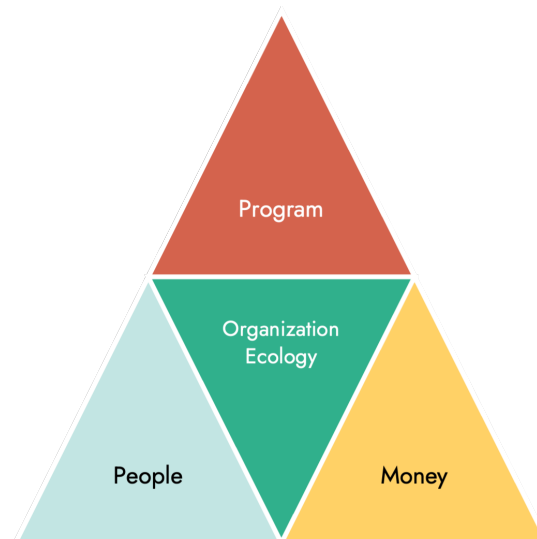
# Organizational Health Review

**Organization:**

**Date:**

**Filled out by:**

**Role:**



**Instructions:** This review provides key indicators of organizational health in three areas—**your programs, your people, and your money**. Use this information to assess your organization's well-being, identify goals, and inform your planning.

Please rate each indicator using the color scale:

- **Green = Yes/We have it**
- **Yellow = It needs work/There's concern**
- **Red = No/We don't have it**
- N/A = Not Applicable

Set aside approximately 15 minutes to complete this survey.

It's very helpful to also review these organizational documents during the assessment:

- Current budget and financial statements
- Mission, Vision and Values
- D.E.I. Statement and strategy plan
- Annual Report
- Most recent strategic plan
- Organizational Tree/Outline/Chart
- Board list, including name, board role, and email address

## PROGRAM

### Clarity of Vision

|                                                                                                                                                                   | GREEN | YELLOW | RED | N/A |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| Our mission, vision, and values are current and reflect who we are and what we do.                                                                                |       |        |     |     |
| Our board and staff know the organization's niche well and can clearly articulate our Theory of Change.                                                           |       |        |     |     |
| Our board, staff, and key volunteers (if applicable) know our short and long-term goals.                                                                          |       |        |     |     |
| Our website and communications include voices and stories of historically excluded and Indigenous communities, created in collaboration, and shared with consent. |       |        |     |     |

### Strategic Thinking and Framework

|                                                                                                                                                              | GREEN | YELLOW | RED | N/A |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We regularly seek input from diverse perspectives, including historically excluded groups, and offer ways of giving input that are accessible and inclusive. |       |        |     |     |
| As new opportunities emerge, we apply a clear strategy filter or screen to check their alignment with our vision, objectives, and values.                    |       |        |     |     |
| We have a current strategic framework/strategic plan (less than 3 years old).                                                                                |       |        |     |     |
| We use the strategic framework/plan to inform our campaign/ program/ project, operational, or organizational level decisions.                                |       |        |     |     |
| We use the strategic framework/plan as a basis for setting goals and objectives in our annual operating plan, budget, and work plans.                        |       |        |     |     |
| The strategic framework/plan includes a fund development plan, so we know our work is financially sustainable.                                               |       |        |     |     |

## Campaigns, Programs, & Projects

|                                                                                                                                                                                                         | GREEN | YELLOW | RED | N/A |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We conduct evaluations of our campaign/ program/ project goals at least annually.                                                                                                                       |       |        |     |     |
| Our campaigns/ programs/ projects have articulated goals and outcomes that are tied to our Theory of Change.                                                                                            |       |        |     |     |
| Our campaign/ program/ project outcome goals were created with input from historically excluded and Indigenous communities.                                                                             |       |        |     |     |
| Our campaign/ program/ project work has generally led to better relationships with our community, including historically excluded and Indigenous communities, coalitions, decision-makers, and funders. |       |        |     |     |
| We spend time on learning, reflection, rejuvenation, and celebration during and after completing a campaign/ program/ project.                                                                          |       |        |     |     |

## Community Engagement

|                                                                                                                                                                                                | GREEN | YELLOW | RED | N/A |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We are good at engaging communities, including historically excluded and Indigenous communities, in culturally sensitive and effective ways, in service to our campaign goals (if applicable). |       |        |     |     |
| We are good at engaging volunteers in service to our campaign goals (if applicable).                                                                                                           |       |        |     |     |
| We engage volunteers in the work of the organization and provide opportunities for leadership, feedback, and support for volunteer roles.                                                      |       |        |     |     |
| We use diversity, equity, and inclusion principles when developing and executing our outreach and engagement strategies                                                                        |       |        |     |     |
| We routinely recognize and celebrate our volunteers, partners, and decision-makers.                                                                                                            |       |        |     |     |
| We report back to our volunteers, partners, and decision-makers on the outcome of campaigns/ programs/ projects we've collaborated on.                                                         |       |        |     |     |

What else to consider about your **PROGRAMS**?

## People

### Strong Leadership

|                                                                                                                                                                           | GREEN | YELLOW | RED | N/A |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We have no key leaders who are planning to transition out of the organization in the next two years.                                                                      |       |        |     |     |
| Our leaders represent the full diversity of the community in which we work.                                                                                               |       |        |     |     |
| Leadership has a comprehensive and documented emergency succession plan which is assessable to the board and other leaders. (e.g. if the ED was suddenly unable to work). |       |        |     |     |
| Leadership has a documented long-term succession plan.                                                                                                                    |       |        |     |     |
| Leadership follows up with people who give input or feedback (e.g. circles back; closes the loop).                                                                        |       |        |     |     |
| Leadership feels confident giving feedback to staff.                                                                                                                      |       |        |     |     |
| Leadership feels confident giving feedback to board.                                                                                                                      |       |        |     |     |
| Leadership feels confident navigating conflict with staff and board.                                                                                                      |       |        |     |     |
| We conduct an annual staff engagement survey.                                                                                                                             |       |        |     |     |

### Supportive Culture

|                                                                                                                                            | GREEN | YELLOW | RED | N/A |
|--------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| Managers or supervisors have regular meetings with staff dedicated to giving and receiving feedback or talking through challenging topics. |       |        |     |     |
| Staff have clear development plans that include financial and time resources for ongoing learning.                                         |       |        |     |     |

## Diversity, Equity, and Inclusion (D.E.I.)

|                                                                                                                                                                                                   | GREEN | YELLOW | RED | N/A |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We have a diversity, equity, and inclusion statement that identifies values, behaviors, and practices we are committed to fostering in our organization and work.                                 |       |        |     |     |
| We have clear short and long-term diversity, equity, and inclusion priorities with benchmarks, and we track our progress towards meeting those priorities.                                        |       |        |     |     |
| We have a clear hiring policy that incorporates diversity, equity, and inclusion principles that specifies how we recruit and retain staff from historically excluded and Indigenous communities. |       |        |     |     |
| We have a process to collect feedback from staff about our D.E.I. leadership, progress, and priorities.                                                                                           |       |        |     |     |

## People Systems

|                                                                                                                                           | GREEN | YELLOW | RED | N/A |
|-------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We currently have NO significant HR issues.                                                                                               |       |        |     |     |
| We currently have NO significant legal issues.                                                                                            |       |        |     |     |
| Staff have written contracts or offers of employment.                                                                                     |       |        |     |     |
| Staff have written job descriptions that reflect their current role.                                                                      |       |        |     |     |
| We have an up-to-date employee handbook that includes HR policies, expectations of being a staff member, etc. that is given to all staff. |       |        |     |     |
| Staff have work plans and check-ins with their supervisors to ensure clear performance expectations and how we are tracking progress.     |       |        |     |     |
| We conduct annual staff evaluations.                                                                                                      |       |        |     |     |
| We have a compensation policy that ensures equitable and competitive salaries are being paid.                                             |       |        |     |     |
| We have the following policies:                                                                                                           |       |        |     |     |
| • Anti-harassment and bullying policy                                                                                                     |       |        |     |     |
| • Anti-retaliation policy                                                                                                                 |       |        |     |     |
| • Annually reviewed compensation policy                                                                                                   |       |        |     |     |
| • Grievance policy or other clearly articulated conflict resolution process/policy                                                        |       |        |     |     |
| • Equal Employment Opportunity policy                                                                                                     |       |        |     |     |
| • Inclusive holiday and leave (family, illness, jury duty, civic time) policy                                                             |       |        |     |     |
| • Disability accommodation policy                                                                                                         |       |        |     |     |

## An Effective Board

|                                                                                                                                                                                  | GREEN | YELLOW | RED | N/A |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We have a clear recruitment policy and process that is based on needed skills, capacity needs of the organization, and incorporates diversity, equity, and inclusion principles. |       |        |     |     |
| Our board adds capacity to our organization.                                                                                                                                     |       |        |     |     |
| Our board effectively contributes to planning and decision-making.                                                                                                               |       |        |     |     |
| Our board members represent the diversity of the broader community in which we work.                                                                                             |       |        |     |     |
| Our board has term limits and practices them as stated in the by-laws.                                                                                                           |       |        |     |     |
| We regularly practice board member succession planning.                                                                                                                          |       |        |     |     |
| We have a thorough onboarding process for new members.                                                                                                                           |       |        |     |     |
| Our board has its own diversity, equity and inclusion plan with benchmarks.                                                                                                      |       |        |     |     |
| The board President/Chair runs productive meetings, keeps the board informed, and is effective at managing disagreement and creating alignment.                                  |       |        |     |     |
| The board President/Chair meets with the E.D./Leadership at least monthly to plan, collaborate, and strategize about big picture topics.                                         |       |        |     |     |
| Our board conducts an annual evaluation of the E.D, including a staff survey, and works with them to create clear and measurable performance goals.                              |       |        |     |     |
| Staff know when to connect with the board and who to talk to.                                                                                                                    |       |        |     |     |
| The Board annually conducts an effectiveness self-assessment                                                                                                                     |       |        |     |     |

What else to consider about your **PEOPLE**?

## Money

### Sustainable Programs

|                                                                                                                                             | GREEN | YELLOW | RED | N/A |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We assign shared operating costs to each program so that we see the full and accurate costs for running all programs.                       |       |        |     |     |
| We yearly evaluate each program and cut back on those that are in deficit and are not core to the mission or vision of the organization.    |       |        |     |     |
| We prepare multiple budget scenarios – from worst case, to program expansion scenarios – to see the impact of raising more or less revenue. |       |        |     |     |

### Financial Reserves

|                                                                                                                                          | GREEN | YELLOW | RED | N/A |
|------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We have at least a 6-month reserve fund based on our cash flow and expenses.                                                             |       |        |     |     |
| We have an annual budgeting process that is clear, transparent, and data informed.                                                       |       |        |     |     |
| Leadership can access reserve funds when needed.                                                                                         |       |        |     |     |
| We have funds set aside for special needs such as key transitions, training, a new initiative, and D.E.I. priorities.                    |       |        |     |     |
| We have an investment strategy for funds held for later use.                                                                             |       |        |     |     |
| We protect assets with adequate insurance, including general liability, directors and officers, workers' compensation, and unemployment. |       |        |     |     |

### Financial Management

|                                                                                                                                             | GREEN | YELLOW | RED | N/A |
|---------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| The financial reports are accurate, clear, and support the planning and oversight needs of the E.D./Leadership and board.                   |       |        |     |     |
| Leadership and/or financial staff meet with the board treasurer monthly to review the financial statements.                                 |       |        |     |     |
| The board treasurer provides monthly financial reports to the board.                                                                        |       |        |     |     |
| We have adequate, clear, transparent, and not overly complicated fiscal control processes (e.g. annual audit, check signing process, etc.). |       |        |     |     |

## Fund Development

|                                                                                                                                        | GREEN | YELLOW | RED | N/A |
|----------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| We currently have NO major financial risks or concerns (e.g. large funding gap, loss of major donor, etc.).                            |       |        |     |     |
| We have a clear case for support that informs our fundraising efforts that was developed with the input of diverse voices.             |       |        |     |     |
| Our overall donor retention rate is 60% or greater.                                                                                    |       |        |     |     |
| Giving from individuals has been stable or increasing over the last three years.                                                       |       |        |     |     |
| We meet our fundraising goals consistently.                                                                                            |       |        |     |     |
| We have a realistic fundraising plan with goals and strategies that are informed by staff capacity and data.                           |       |        |     |     |
| Staff review the fundraising plan regularly to check for necessary changes and compare actual money raised to fundraising projections. |       |        |     |     |
| Our fundraising plan includes long-term goals and strategies for growth.                                                               |       |        |     |     |
| We have a clear and documented process for cultivating and stewarding donors over time.                                                |       |        |     |     |
| We conduct periodic donor appreciation activities (e.g. personal thank you calls, event or gathering, etc.).                           |       |        |     |     |
| We have a well-developed:                                                                                                              |       |        |     |     |
| • Monthly giving program                                                                                                               |       |        |     |     |
| • Major giving program                                                                                                                 |       |        |     |     |
| • Legacy giving program                                                                                                                |       |        |     |     |
| We have a gift acceptance policy (e.g. do we accept real estate, art, stocks, and do we sell them upon acceptance, etc.)               |       |        |     |     |

## Fund Development Team

|                                                                                                                                                                 | GREEN | YELLOW | RED | N/A |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|-----|-----|
| Fundraising is viewed as being a shared responsibility at our organization where most people have a role.                                                       |       |        |     |     |
| The E.D./Leadership actively engages in fundraising work that supports the fundraising plan and strategies.                                                     |       |        |     |     |
| The board actively engages in fundraising work, knows what they are expected to do, and have systems of support and accountability in place for doing the work. |       |        |     |     |
| All fundraising staff, if applicable, have been in their role for at least the last 2 years.                                                                    |       |        |     |     |

What else to consider about your **MONEY**?