



Organizational Health Review

PROGRAM

- 1. Clarity of Vision.** *A healthy organization has a clear purpose and a programmatic vision that is in alignment with their Diversity, Equity, and Inclusion values. They have a clear focus, and they effectively communicate it to others. The result is that they stay focused on the programs and opportunities that best serve their overall vision.*

Is our vision clear? Does it demonstrate our diversity, equity, and inclusion values? Is it well-communicated? Does it guide how we recognize opportunities?

Some considerations:

- Do our board, staff, and key volunteers know the organization's niche well, and have pride in the vision?
- Do we effectively communicate how the vision translates into short and long-term goals?
- Do our website and communications highlight the voices and stories of historically excluded and Indigenous communities?
- As new opportunities emerge, do we apply a clear filter and review opportunities to make sure that we stay in alignment with our vision?
- Are we thoughtful leaders within our niche?



- 2. Organizational Introspection.** *A healthy organization carefully reviews its strengths, weaknesses, opportunities, and threats. They get input from board, staff, volunteers, and community members, including historically excluded and Indigenous communities. By broadening the input, they make sure they are working alongside others and not centering their organization.*

Have we asked ourselves reflective questions? Have we gotten input from others? Are the learnings shared, and communicated internally and externally?

Some considerations:

- Have we engaged in a thorough collective process for organizational introspection during the last 3 years?
- Have we sought out input from diverse perspectives, including historically excluded and Indigenous groups? Are we offering methods of giving input that are broadly accessible and inclusive?
- Do we revisit our thinking as a board and staff on an annual basis to reflect on learnings, growth edges, and opportunities?
- Do staff and board share learnings with each other, partners, and others who have shared input? If so, how?



3. Strategic Thinking and Framework. *A healthy organization translates its mission and vision into clear medium to long-term strategies that drive actions at all levels. They use these strategies (strategic framework, strategic plan, planning tools, budget, etc.) to guide their annual planning and decision-making. They are clear on desired outcomes and continually evaluate progress.*

Do we have a strategic framework? Do we use, update, and evaluate it?

Some considerations:

- Do we have a current strategic framework (less than 3 years old) that is informed, developed, and validated by our collective community?
- Do we use the strategic framework as a basis for goals and objectives in our annual operating plan, budget, and quarterly work plans?
- Do we regularly refer to these strategic tools during staff and board meetings and assess our workload, programs, and impact in relation to our strategy? Do we update and revise our plans and strategic frameworks periodically?
- Do we seek feedback from our collective community about our goals, both in terms of whether they are the correct ones and how we are doing in our work toward them?
- Does the strategic framework include a fund development plan so we know our work is financially sustainable, and how we will attract and engage funders in our work?
- Does the strategy contain accountability measures for deepening diversity, equity, and inclusion?



4. Campaigns. *Highly impactful campaigns have clear definitions of success which are co-created and shared by partners, volunteers, and historically excluded and Indigenous communities. Dynamic campaigns are proactive and flexible enough to take advantage of changing circumstances. Sustainable campaigns incorporate relationship and capacity-building goals, in addition to policy and other types of measurable changes. Organizations are stronger than when they started the campaign, regardless of whether the campaign itself was successful.*

Do we impact policy decisions or impact other long-term change? Is our campaign work sustainable – do we undertake and manage campaigns and coalitions in a way that makes us stronger and more resilient, rather than depleting the organization?

Some considerations:

- Do our campaigns have clear and measurable outcome goals? Were those campaign goals created with input from, or in partnership with, historically excluded and Indigenous communities?
- Do the campaigns articulate goals around relationships, organizational capacities, staff/volunteer capacities, and other benchmarks while we make headway towards our longer-term objectives?
- Has our campaign work resulted in a better relationship with the community? With historically excluded and Indigenous communities? Our coalitions? Decision-makers? Funders?
- Do the campaigns have proactive plans, strategies, and tactics? Are we also able to quickly adapt to new information?
- Do we commit time and space for learning, reflection, rejuvenation, and celebration during and after the campaign?
- Are the campaigns achieving our internal and external goals?



5. Community Engagement. *A healthy organization understands community impact and integrates community involvement into each aspect of program management; from assessing opportunities and threats, to creating strategies and desired outcomes, to devising and implementing campaigns. It adapts to changing demographics and consciously works to reflect those communities, ensuring that the organization, its campaigns, and coalitions are led by racially, ethnically, and culturally diverse people.*

Do we have effective strategies for community engagement? Are we engaging diverse communities and building solid relationships? Are we working effectively with volunteers?

Some considerations:

- Do we proactively build relationships with and solicit input on our work from a range of partners, community members, and leaders including historically excluded and Indigenous communities in culturally sensitive and effective ways? Do we act on that input?
- If issues and programs are controversial, do we consistently seek areas of common ground? In instances where agreement isn't reached, do we acknowledge and respect the opinions of others while centering the experiences of those from historically harmed communities?
- Do we engage volunteers in the work of the organization? Are there leadership roles for volunteers? Are there job descriptions, opportunities for feedback, and appropriate support for volunteer roles?
- Do we use diversity, equity, and inclusion principles when developing and executing our outreach and engagement strategies? Do we acknowledge and address historical and active harm done to marginalized communities in public and private settings?
- Do we routinely recognize and celebrate our volunteers, partners, and decision-makers?



PEOPLE

- 6. Strong Leadership.** *Healthy organizations are led by leaders – regardless of their title – who build trust, encourage open discussion, and guide strategic direction. Strong leaders have the emotional intelligence required to work effectively with the staff and board – listening, handling conflict, and bringing out the best in others. They are also effective at recruiting staff and building high-functioning teams that encourage diverse perspectives and lived experiences. A healthy organization knows that “your people are your strongest asset,” and has leaders that enable all staff to work to their full potential.*

Does our organizational leadership build and motivate a team around the organization's vision, values, and strategies in such a way that they bring out everyone's best work?

Some considerations:

- Do our leaders represent the diversity of the community in which we work? Are our leaders good at identifying, recruiting, and onboarding high performing staff from a diversity of lived experiences?
- Are our leaders transparent and proactive in their communication with the rest of the staff? Do our leaders foster teamwork and collaboration amongst the staff? Do our leaders encourage discussion and make space for folks that might feel excluded to ensure all voices are considered in decisions?
- Are our leaders self-aware, effective listeners, and skilled at handling conflict?
- Do our leaders hold themselves and all staff accountable equally?
- Can our leaders adapt to changing conditions? Are we comfortable with change and different ways of knowing?
- Does the Executive Director have an internal support structure? If the organization's size warrants it, is there a strong and effective leadership team in place?



- 7. Supportive Culture.** *A supportive culture practices individual and team learning, innovation, accountability, trust, inclusion, and fun. In a healthy organization, staff share ideas and support each other. Each person is invested in each other's success.*

Is our organizational culture based on honesty and trust, inclusion, innovation, and does it support individual and team learning?

Some considerations:

- Do staff regularly and openly give and receive feedback, and have challenging conversations when needed?
- Do we support the staff's development with resources for ongoing learning?
- Is improvising, creativity, and appropriate risk-taking rewarded, even when it doesn't work out?
- Is the culture inclusive? Are differences in perspective, background, experience, culture, and communication style acknowledged and appreciated?
- Do we regularly acknowledge and celebrate individual, team, and organizational achievements?



8. Diversity, Equity, and Inclusion (DEI). *A healthy organization recognizes that diversity, equity, and inclusion strengthen its ability to fully serve the community and fulfill its mission. Healthy organizations have an active Diversity, Equity and Inclusion Initiative which is championed by all members of the organization and integrated into their programs, staff policies, and organizational decisions around money.*

Do we have a diversity, equity, and inclusion (DEI) vision and plan? Are we moving towards greater diversity, equity, and inclusion with our staff, board, constituents, and programs?

Some considerations:

- Do we have a diversity, equity, and inclusion statement that identifies the values, behaviors, and practices we are committed to for fostering diversity, equity, and inclusion? Is this statement promoted internally and publicly?
- Do we have clear short and long-term diversity, equity, and inclusion priorities with benchmarks? Are we tracking our progress towards meeting those priorities? Are we sharing about our progress in order to be accountable to our partners, especially those from historically excluded and Indigenous communities?
- Have we reviewed our internal and external policies and communications through a lens of inclusivity and cultural awareness? Are we updating our practices when recruiting, hiring, and on-boarding volunteers, staff, and board members to help meet our diversity, equity, and inclusion priorities and goals?
- Are we investing in our members so all can champion our diversity, equity, and inclusion work and keep us aligned with our DEI values and goals? Have we identified and made use of appropriate resources and training opportunities to help us center excluded communities' experiences and voices?
- Is our staff and Board of Directors diverse in terms of race, cultural heritage, gender identity, sexual orientation, age, and other dimensions?



9. Staff Resiliency and Engagement. *The staff of a healthy organization generally find their work sustainable and in balance with the rest of their lives. They see themselves in the work, have impact, and feel valued and heard. When there is turnover, it is handled with adequate training and transition time.*

Does our organization support staff's well-being? Are our staff engaged and resilient?

Some considerations:

- Are staff aligned and connected to our mission and values? Do staff feel empowered, supported, heard, and valued? Does everyone understand how decisions are made and have ways to give input?
- Are there regular times for reflection, self-care, and celebration? Do we promote culturally inclusive practices for self-care?
- Do staff feel connected to the organization and one another? Is the organization well connected to partners and the community at-large?
- Do our leaders regularly engage in succession planning before they leave? Are there active efforts to recruit and retain staff from historically excluded and Indigenous communities?



10. People Systems. *In a healthy organization, personnel systems are in place that serve both management and the employee. The systems reflect shared values and assure equitable treatment for all staff.*

Do we have “people systems” in place like personnel policies, job descriptions, annual work plans, and evaluations? Do we have equitable and competitive total compensation?

Some considerations:

- Does the organization work to develop inclusive policies grounded in equity? How are you sharing policies with staff? (paid time off, conflict of interest, etc.)
- Do staff have written job descriptions? Do they understand their role(s)?
- Are you clearly communicating expectations of staff? How are you mutually tracking and updating on progress? (Ex: work plans, check-ins)
- Do you provide annual and ongoing feedback to staff in multiple ways? How are you using these feedback sessions to support the growth of individuals in your organization?
- Have you taken steps to evaluate your pay structure to ensure equitable and competitive salaries are being paid?
- Does the organization comply with labor laws? (Ex: overtime, employee versus contractor)



11. An Effective Board. *In a healthy organization, the board provides strategic leadership. They understand their role is in governance, not management. They are active and there to lend a hand, even though many times a lighter touch is all that is needed.*

Do we have an active board providing strategic leadership and effective governance?

Some considerations:

- Does our board keep an eye on the long-term, making sure the organization is sustainable and engaged in the most optimal path forward? Do they add value to planning and decision-making? Do they recognize and celebrate success?
- Do our board members represent the diversity of the community in which they work? Are all the board members invited to contribute according to their individual strengths and our needs in meaningful ways?
- Are there term limits for board members? Do we have a board member succession plan and a thoughtful orientation for new members that includes holding and practicing the organization’s diversity, equity, and inclusion values and culture?
- Does the board have its own diversity, equity and inclusion plan with benchmarks and priorities? Is our board sharing about their progress in order to be accountable to our partners, especially those from historically excluded and Indigenous communities?
- Is the Board Chair engaged, able to facilitate meetings, and do they keep the board informed? Is the Board Chair able to manage disagreement and create alignment?
- Does our board set clear expectations for the Executive Director, and does the Board Chair have a good working relationship with the Executive Director? Do we conduct an annual evaluation of the Executive Director? Does our board evaluate itself?



MONEY

12. Sustainable Programs. *A healthy organization prepares an annual budget by program area so that the staff and board are aware of which of the organization’s programs are funded and sustainable, and which are being subsidized by general support funds. Programs that are not core to the organization’s mission and are not funded are cut back. Fund development efforts are focused on programs that are core to the organization’s mission and programs that support the DEI values of the organization.*

Do we have adequate funds for the programs we have planned? Do we evaluate programs as cost centers and do budgeting and planning by program area? Are we committed to sustaining programs that support diversity, equity, and inclusion throughout our organization?

Some considerations:

- Do we assign shared operating costs to each program so that we see the full and accurate costs for running each of our programs?
- Do we evaluate the surplus or deficit for each of the program areas to support making informed decisions?
- Do we cut back on programs that are in deficit and are not core to the mission or vision of the organization?
- Do we use this cost-centered approach to evaluate new funding opportunities to make sure we are looking for funding that supports core programs?
- Do we prepare multiple budget scenarios – from worst case to program expansion scenarios – to see the impact of raising more or less revenue?
- Do we work to fund programs that support diversity, equity, and inclusion?



13. Financial Reserves. *A healthy organization has consciously and carefully built up their unrestricted reserves such that they have three to six months of operating monies available should they need it.*

Do we have adequate money saved in unrestricted reserves?

Some considerations:

- Have we established an adequate reserve goal based on our cash flow and expenses?
- Are we working to add to it by consistently budgeting for a surplus?
- Do we have funds for special needs such as board restricted funds, new initiative funds, DEI priorities, and endowment accounts? Do we have plans to build these reserve funds?
- Do we protect assets with adequate insurance, including general liability, directors and officers, workers’ compensation, and unemployment?



14. Financial Management. *A healthy organization has accurate and timely financial reporting and competent fiscal oversight. The fiscal manager works as part of a team, along with the Executive Director, Treasurer, and other members of the board to oversee the organization's finances.*

Do we have competent fiscal oversight and accurate financial reporting? Do we have strong people doing appropriate fiscal functions in the Fiscal Manager, Executive Director, and Treasurer roles?

Some considerations:

- Do the financial reports support the planning and oversight needs of the Executive Director and the board? Are financial reports transparently shared and reviewed regularly between the ED and board?
- Does the Treasurer make sure the board is looking out for the long-term financial sustainability of the organization?
- Do we have adequate fiscal control processes? Are they clear and transparent?
- Is the fiscal manager/bookkeeper adequately informed about changes to income streams and planned expenses?
- Do we prepare and submit required reports on time, if our organization requires an annual audit by a qualified CPA?
- Do we have systems in place that ensure sensitive files are protected and backed up regularly?



15. Diversified Income Sources. *In fund development, a healthy organization plays to its strengths while continually exploring new funding opportunities. They pursue income from a variety of sources using strategies that have proven to be successful.*

Do we have an effective approach to diversify the sources of our income? Have we taken full advantage of our proven, effective fund development strategies to include a multitude of sources?

Some considerations:

- Have we identified which fund development strategies we excel at and/or have the most potential for our organization? Are those strategies inclusive of and in support of relationship building with historically excluded and Indigenous communities?
- Do we build upon those successful strategies by identifying additional, similar income sources?
- Have we developed a case for support with the input of diverse voices and perspectives from the communities our work impacts?
- Are we effective at retaining grants? Major donors? Small donors? Acquisition strategy?
- Do we acknowledge all gifts and recognize and celebrate all donors in meaningful and appropriate ways?
- Do we have a robust database that supports our fund development program and goals?



16. Fund Development Plan. *In sustainable organizations, the fund development plan is one of the organization's key documents. It is current and accurate. The strongest development plans are created with input from people across your organization, who also participate in the plan and understand it. It reflects the organization's values and role in the larger community.*

Do we have a current, realistic development plan? Was it developed with input from the development staff, Executive Director, program staff, and board? Do we regularly review, update, and celebrate progress?

Some considerations:

- Does our plan include in-kind goods and services, pro bono services, or other resource development strategies beyond money?
- Does our plan reflect our equity values and partnership goals? For example, does it include ways we will support the development of organizations led by historically excluded and Indigenous communities and other partners? Does it include strategies for donor engagement that reflect our values and build community?
- Does everyone in the organization know what is in the plan and are we invested in it?
- Have we allocated enough people and financial resources to make sure we can implement the plan?
- Do we review the plan on an ongoing basis for any necessary changes and for comparison to actual results? Do we celebrate the success of individuals and the team as a whole?



17. Fund Development Team. *When it comes to resource development, the more people engaged in doing the work, the better. Organizations which encourage and celebrate participation from program and operations staff, board members, the Executive Director, donors, volunteers, and partners often create more diverse and dynamic ways to support the organization.*

Are people throughout our organization contributing to development? Are all expectations and roles clearly understood? Is the development staff adequately supported and turnover at a healthy level?

Some considerations:

- Does the ED make regular time for the development activities that play to their strengths and contribute the most to the overall effort?
- Does the board know what they are expected to do, and do they have systems of support and accountability in place for doing the work?
- Does the entire organization understand that our ability to meet our income projections for the year is up to everyone?
- Do development staff do a combination of supporting the work of others and doing the work themselves? Are their personal goals and the expectations for supporting others clear?
- Do all fundraisers seek innovative ways to raise resources for the organization? Do they also seek and create opportunities to support the resource development of nonprofit partners? Are these innovations sensitive to and inclusive of historically excluded and Indigenous communities?
- Is development work celebrated regularly and alongside program work?

