

Organizational Sustainability and Succession Action Planning

Please read the following questions and rank the level of priority for you and your organization. Ranking scale: High, Medium, Low or no priority (NP)?

Business	Our organization requires a review of the business model (what we do and how we pay for it) to ensure that it that has at least 5-7 years of life in front of it and is built on quality services/products that are needed by our constituents and valued by donors/funders.	High	Medium	Low	NP
	Our strategic or long-range plan (or business/organization strategy) needs to be reviewed for is relevance in today's and tomorrow's market conditions.	High	Medium	Low	NP
	Among the board, executive and management team we need to align our direction and strategy.	High	Medium	Low	NP
Leadership	We have a strategy in place to recruit, develop and deploy new leaders, both staff and board.	High	Medium	Low	NP
	Processes need to be put into place and followed for orientation of new board members.	High	Medium	Low	NP
	Processes need to be put into place to have a pipeline of leaders.	High	Medium	Low	NP
Resources	Our organization requires sufficient financial resources to meet its commitments in the short to mid-term.	High	Medium	Low	NP
	We need to develop an appropriate degree of diversification of revenue streams.	High	Medium	Low	NP
	A proactive resource development strategy is in place that is tuned to our organization's particular market – the present market as well as future market.	High	Medium	Low	NP
Culture	Our organization's culture needs to become more forward-focused, results-oriented and action-based.	High	Medium	Low	NP
	The value and worth of the organization must be widely understood throughout the board, staff and volunteers.	High	Medium	Low	NP
Succession	We need to develop written emergency backup succession plans for executive and senior management.	High	Medium	Low	NP
	We need to develop leadership development practices and/or cross-training plans to increase our bench strength and pipeline of leaders internally	High	Medium	Low	NP
	We need to develop a communications plan which describes who needs to know of a planned or unplanned absence, when and by whom.	High	Medium	Low	NP
	We need to develop a written succession policy for our organization.	High	Medium	Low	NP
	We need to develop guidelines around internal candidates, national vs. local searches, and how a transition will be handled by the Board	High	Medium	Low	NP
	We need to regularly review bench strength, position descriptions, and potential leadership aspirations.	High	Medium	Low	NP
	We have a comprehensive list of all passwords, bank accounts, IT information in one place with more than one person familiar with the details.	High	Medium	Low	NP