

THE SUSTAINABILITY ASSESSMENT TOOL

Grow on
Stable
Ground



A Step-by-Step
Workbook for
Assessing Your
Sustainability
Practices



Know Your
Organization (Plan
Your Impact)

Dive into sustainability

We know you're passionate about making a positive impact and growing your nonprofit or small impactful business. That's why it's crucial to ensure your organization is sustainable in the long run. Sustainability means having the strength to keep doing what you do best and evolving to meet new challenges.

We present you with guided questions, helping you deep dive into your organization's sustainability. These are some indicators around your organization's ability to thrive and make a lasting impact. You don't need to have perfect scores. What this tool offers are elements to guide your internal discussions and assessments.

Keep in mind that this tool provides general questions and areas of focus, every organization has its own unique context, mission, and goals. The context in which you operate matters significantly, and you should tailor this assessment to your organization's specific needs and objectives. The goal is for you to be resilient and achieve your mission.

What is this tool about?

Think of a Sustainability Assessment as your organization's check-up. It is a process that allows you to comprehensively evaluate your capacity to operate effectively, make a significant impact, and continue to evolve in a rapidly changing world. It involves an introspective examination of your organization's various facets, from its core mission and governance to financial health, program impact, brand image and operational efficiency. Sustainability assessment helps identify areas of strength, as well as those that require improvement, ensuring that your organization remains robust, adaptable, and mission-focused.





Who is This Tool For?

This Sustainability Assessment Tool is for you – the nonprofit executive or business leader who wants to see your organization grow and make a positive difference. This tool is designed to help you easily evaluate your organization's sustainability. This tool is a valuable resource for those who recognize the importance of consistent self-evaluation as a means to enhance their organization's long-term success.

How Often Should It Be Used?

Well, that depends on your specific context. We recommend doing this check-up once a year. Things change, and this annual check-up helps you stay flexible and responsive to new opportunities and challenges. But remember, your organization is unique, and context matters. You can adjust the frequency based on what suits you best. The sustainability landscape can shift rapidly, and regular assessment allows your organization to remain agile and responsive.

How do I use this tool?

In the following sections, you'll find a series of questions designed to guide your self-assessment. We are inviting you to assess the sustainability elements within your organization and have compiled 8 big questions for you. At the end of the document, you will be able to compile a rating for each section, and use these ratings to prioritize actions! We encourage you to use this tool with your team, inviting them for a transparent and open discussion. The scoring for each section is not as important as the descriptions and discussions you have. Plan for at least half a day, to go over the different questions. The tool offers 8 sections, and each requires at least 30minutes to be completed. If you're allowing in-depth discussions, time each section accordingly!

Flag the questions that you have difficulty answering... These are significant for the action plan to improve your sustainability.

Can you think of stakeholders to engage with to answer elements of this tool? Invite them for an open conversation. We promise you surprises! Have open transparent discussions, challenge yourselves to improve.

We hope that you find this tool practical, inspiring and fun



Are you flexible and strategic?

Welcome to the foundational elements of your organization, the unique tale that makes your organization shine. In this section, we delve into your organizational roots – your mission, history, strategy and engagement with your community. These elements are the bedrock of your identity, providing the stability essential for your organization's sustainability. This sets the stage for assessing how well your organization's core elements align with your mission and goals.

Strategic planning and adaptability are your organizational compass in a dynamic and chaotic world. Crafting a robust plan and remaining adaptable are key to navigating uncertainties and seizing opportunities, fostering sustainability in a rapidly changing landscape.



Mission and Vision Review

Does your organization have a clear and compelling mission statement that reflects your core purpose and values?

☐

Yes

☐

No

☐

I don't know

How often do you review and update your mission and vision statements to ensure alignment with your current goals and impact objectives?

☐

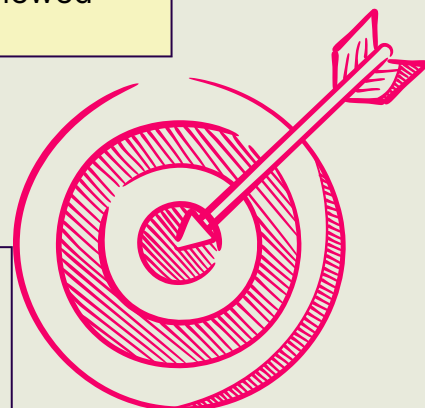
Yearly

☐

Every 5 years

☐

Never reviewed



Your milestones

Can you identify significant milestones or achievements in your organization's history that have contributed to your growth and impact? What are some lessons you have learned?

Section 1:
Are you flexible and strategic?

Your Community

Who are the primary communities with whom you work?

How involved are they with your organization? (check all that apply)

- ☐ We have a feedback mechanism in place
- ☐ We consult with them regularly
- ☐ They are represented in the organization's leadership
- ☐ Other:

Has there been recent changes in your community's context, one that would need to be taken into consideration to adapt your mission?

☐ I don't know

Your Strategic Plan

When was your organization's most recent strategic plan developed?

Do you have a documented risk management plan that identifies potential risks and mitigation strategies?

☐

Yes

☐

No

☐

I don't know

How often is the strategic plan reviewed and updated?

☐

Yearly

☐

Every 5 years

☐

Never reviewed

What key goals and objectives does your strategy outline?
Do they respond to the actual context?

☐

Yes

☐

No

☐

I don't know

How does your organization react to changing internal and external factors, such as economic conditions, regulations, or shifts in community needs?
(check all that apply)

☐

We research and assess changes regularly

☐

We have an effective communication & decision-making system in place

☐

We often make changes at the organization & program level, based on context fluctuations

☐

Other:

Section 1: Are you flexible and strategic?



Our favorite tips

- Regularly review and refine your mission and vision statements to ensure they stay relevant and inspirational.
- Document and celebrate your organization's milestones, using them as building blocks for growth and impact.
- Your mission, vision and milestones are important for your organization's storytelling! You would use these in engaging those around you to join you on your mission! Keep those answers in mind when you are designing your compelling messages to your audiences.
- Continuously seek feedback from the communities you serve and adapt your programs to address their evolving needs.
- Regularly update your strategic plan to reflect changing priorities and opportunities.
- Cultivate a culture of adaptability and encourage proactive risk management and contingency planning.
- Stay informed about emerging trends and challenges that may impact your organization.

Are you flexible and strategic?

Based on your answers on the Mission & Vision Review, your milestones and your strategic plan, give a rating to your organization on the question:
How flexible and strategic are you?



Use this space to summarize your notes about being flexible and strategic.

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Are your leaders leading well?

This section focuses on the compass and captains of your organizational ship. Governance and leadership play a pivotal role in steering your organization. A strong, diverse leadership ensures stability and resilience, crucial factors for sustained success.

Read the following questions carefully and rate your organization's performance.





Section 2:
Are your leaders leading well?

The Sustainability
Assessment Tool

How diverse is your board in terms of expertise,
demographics, and perspectives?



Is there a clear understanding of the roles and
responsibilities of board members, including
committees and leadership positions?



How often does the board meet, and are meetings
productive and well-attended?



How active is your board in organization
representation and fundraising?



How active is your team members in communication
and fundraising?



How well do you assess the overall effectiveness and
contributions of your board?





Section 2:
Are your leaders leading well?

The Sustainability
Assessment Tool

**Do you have accountability mechanisms in place
(policies, procedures) across all your organization?**



**How well-prepared are you for unforeseen leadership
changes, and what steps have you taken to mitigate
potential disruptions?**



**Have you identified and developed potential
successors for key leadership roles within the
organization?**



**How effective is the communication between the
different teams/members?**



**How inclusive and participatory are the decisions you
take at the organization level?**



Section 2: Are your leaders leading well?



Are your leaders leading well?

Where does the majority of rating falls?

Give yourself an overall rating to the question: Are your leaders leading?



Some tips you can pin

- Foster board diversity to bring a wide range of perspectives and expertise to your organization.
- Encourage active participation from your leaders and teams in fundraising and strategic decision-making.
- Develop a leadership succession plan to ensure smooth transitions and preserve institutional knowledge.
- Have clear accountability systems in place and always abide by them.

Use this space to summarize your notes about your leadership

--

Do you have diverse & reliable revenues?

Let's dive into the financial backbone of your organization. Financial sustainability goes beyond numbers; it ensures your organization has the resources needed to fulfill its mission.

Diversification, strategic planning, and donor engagement are the cornerstones of financial resilience.

If you find it difficult to answer the below questions, remember that we are a click away. We are happy to have a conversation about your needs!



Your budget and reserves

Do you have an organization budget in place?

☐

Yearly budget

☐

Quarterly budget

☐

No budget

What percentage of it is covered?

Does your budget include administrative and overhead costs?

☐

Yes

☐

No

☐

I don't know

What financial reserves or savings mechanisms do you have in place to
address unexpected expenses or revenue fluctuations?

How do you assess and manage your budget to ensure ongoing operational
stability?



Section 3:
Do you have diverse & reliable
revenues?

Your revenue sources analysis

List your primary sources of revenue and their respective proportions in your overall budget:

	Amount (\$)	Proportion (%)
Individual donors		
Corporate partners		
Foundations		
Government funding		

How diverse is your funding base? ☆☆☆☆☆

What are your sources to cover overhead (operational costs)?



Fundraising & Development Strategies

Describe your current fundraising strategies and initiatives

**How effective are your fundraising strategies in
meeting your financial goals?**



☐ I don't know

**Do you have a written fundraising plan that outlines goals, strategies, and
timelines?**

☐ Yes

☐ No

☐ I don't know

**How well do you steward donor relationships, and
what efforts are in place for donor retention and
engagement?**



☐ I don't know

Do you think there is enough resources around you?

☐ Yes

☐ No

☐ I don't know

Section 3: Do you have diverse & reliable revenues?

Do you have diverse & reliable revenues?

After going through all these fundraising-related questions, do you find that you have diverse and reliable revenue?



Fundraising is key!

- Diversify your revenue streams to reduce dependence on specific donors or sources. Disclaimer: For very small organizations, diversifying is important; as much as building strong and reliable sources to launch. Ask your expert for advice
- Consider special fundraising sources that cover overhead/operation expenses
- Create a comprehensive fundraising plan with clear goals, strategies, and metrics.
- Cultivate and steward donor relationships, ensuring they are engaged and informed about the impact of their contributions.
- Seek support from an expert or build this expertise among your team. Fundraising is a long-term delicate job that needs your full attention
- **Adopt an abundance mindset!**

Use this space to summarize your notes about your fundraising

--

Are you responsive, inclusive and knowledgeable?

You need to stay relevant and impactful in order through the various context changes.

Your programs and services are the reason you exist. These are your direct points of contact with your clients, your communities and your stakeholders. The way you track your progress, impact, relevance and inclusivity is important for your sustainability.



Section 4:
Are you responsive, inclusive and knowledgeable?

The Sustainability
Assessment Tool

Do you regularly track and evaluate the outcomes of your programs and services?

☐

Yes

☐

No

☐

I don't know

Do you communicate your program outcomes to your stakeholders, including beneficiaries, donors, and the community?

☐

Yes

☐

No

☐

I don't know

Do you constantly assess and improve your programs' inclusivity?

☐

Yes

☐

No

☐

I don't know

Are your programs and services directly aligned with your organization's mission and long-term goals?

☐

Yes

☐

No

☐

I don't know

Are your programs and services directly aligned with your organization's mission and long-term goals?

☐

Yes

☐

No

☐

I don't know

Are your community members engaged in your programs?

☐

Yes

☐

No

☐

I don't know



Section 4:
Are you responsive, inclusive and knowledgeable?

The Sustainability
Assessment Tool

Do you engage with your community and the general public to build awareness and support for your mission?

☐

Yes

☐

No

☐

I don't know

Are there mechanisms for measuring the effectiveness of your community engagement efforts?

☐

Yes

☐

No

☐

I don't know

Are there changes to the context that will affect your programs and services?

☐

Yes

☐

No

☐

I don't know

List some:

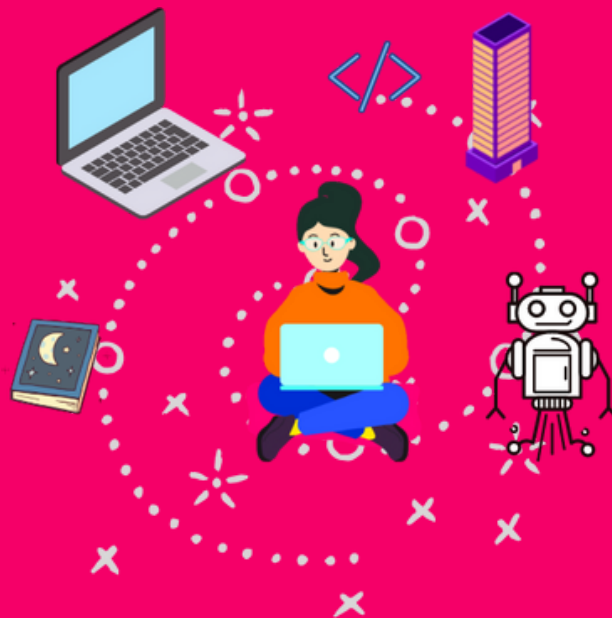
Are you responsive, inclusive and knowledgeable?

In a nutshell, how does your organization rate when it comes to being responsive, inclusive and knowledgeable?



Do you have the right technology?

The right technology investments would help you notice and respond to changes. Data-informed decisions are the best! It often saves you time, money and unnecessary confusions. Invest in technology and infrastructure that support operational efficiency and strategic objectives.





Section 5: Do you have the right technology?

The Sustainability
Assessment Tool

What system and tools do you use for:

Team management	
Team communication	
Fundraising	
Communication	
Program tracking	
Accounting and finance	
Client management	
Knowledge management	

How well-equipped is your organization with technology and infrastructure to support your operations and growth?

☐

Well equipped

☐

My systems need
improvement

☐

i don't know

Do you have the right technology?

After looking at your systems, give a rating to how much you are utilizing technology effectively



Are you collaborative?

You don't operate on an island! Partnerships and collaborations increase efficiency and impact. Seek collaborations and partnerships to leverage resources and expertise.





Section 6: Are you collaborative?

The Sustainability
Assessment Tool

Describe existing partnerships or collaborations.

Do they align with your mission?

☐

Yes

☐

No

☐

i don't know

What strategies are in place to identify and cultivate new partnerships?

What partnerships and collaborations are you engaging in to influence systemic change, specifically related to the non-profit sector?

Are you collaborative?

And now give your organization a rating



Do you have a resilient team?

The heart of any organization lies in its people. This section examines human resources and capacity building – the strategies for recruiting, developing, and engaging a capable team. An engaged, satisfied and skilled team is fundamental to organizational strength. This is the most important element for organizations' success. Let's analyze the effectiveness of your organization in attracting and retaining talented staff.



Section 7:
Do you have a resilient team?

The Sustainability
Assessment Tool

Do you have a healthy turnover?

- ☐ Yes
☐ No
☐ I don't know
-

Do you have systems and policies to ensure staff satisfaction and retention?

- ☐ Yes
☐ No
☐ I don't know
-

Do you pay your team enough?

- ☐ Yes
☐ No
☐ I don't know
-

Do you have processes to intentionally assess and address Equity, Diversity, Inclusion and Accountability concerns?

- ☐ Yes
☐ No
☐ I don't know
-

Are there opportunities for staff to engage in ongoing professional development and training?

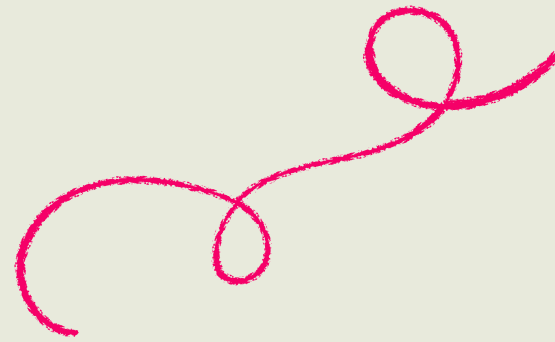
- ☐ Yes
☐ No
☐ I don't know
-

Do you have strategies for recognizing and retaining dedicated volunteers?

- ☐ Yes
☐ No
☐ I don't know
-



Section 7:
Do you have a resilient team?



Do you have a resilient team?

How many “Yes” answers did you check? Can you confidently say that you have a resilient team? Give your organization the appropriate rating



Take care of yourself, and of your team

- Develop a competitive compensation and benefits package to attract and retain talented staff.
- Promote a culture of equity, diversity, inclusion and accountability
- Offer opportunities for ongoing professional development and training to enhance skills and expertise.
- Create a positive and inclusive organizational culture that values and recognizes the contributions of both staff and volunteers.

Use this space to summarize your notes about your team management

Are you a thought leader? Are you present online?

Brand authority is a critical element of an organization's sustainability. It's more than a logo; it represents your reputation, credibility, and influence in your field. This section assesses how well your organization establishes and maintains brand authority to build trust and achieve long-term impact. In the digital age, an online presence is vital for the success and sustainability of nonprofits and small impactful businesses. This section focuses on assessing how well your organization leverages digital tools and communication strategies to connect with your audience, raise awareness, and further your mission. It explores how a strong brand, built on trust and credibility, contributes to your organization's lasting impact.



Section 8:
Are you a thought leader? Are you
present online?

The Sustainability
Assessment Tool

Your Brand Authority and Reputation

How is your organization perceived within your community
and among your stakeholders? Do you have a strong and
positive reputation?



How is your brand positioned in comparison to similar and
same caliber organization



What efforts have you made to actively build and maintain your
organization's brand authority?
(Check all the boxes of activities that apply)

Content Marketing	Advertisement	Hosting a Conference	Organizing a PR Event
Feedback Collection	Webinars	Community Initiatives	Social Media & Email Marketing
Involve community in projects	Adopting Awards Programs	Other:	

Your Influence and Impact

To what extent does your organization have influence and authority in your field or among your target audience?

We can change people opinion ☐	We have influence but on few people ☐	We can't influence our audience ☐
We can create trends and new waves ☐		We can find some allies and spread our word ☐

Are your communications engaging and informative, reflecting your organization's work and impact?

☐

Yes

☐

No

☐

I don't know

Can you provide examples of how your organization has effectively used its brand authority to achieve its mission and goals?



Section 8:
Are you a thought leader? Are you
present online?

The Sustainability
Assessment Tool

Your Communication & Brand Strategy

Do you have a formal communication plan that
outlines your goals, target audience, and
strategies for communication?

- ☐ Yes
☐ No
☐ I don't know

Are you actively engaged on social media
platforms relevant to your audience and mission?

- ☐ Yes
☐ No
☐ I don't know

Do you actively respond to comments and
messages from your audience on social media
and other online channels?

- ☐ Yes
☐ No
☐ I don't know

Do you have an email list of supporters, clients,
partners?

- ☐ Yes
☐ No
☐ I don't know

Do you regularly communicate with your
audience through newsletters or updates?

- ☐ Yes
☐ No
☐ I don't know

Describe your frequency (Week - Month - Year):





Section 8:
Are you a thought leader? Are you
present online?

The Sustainability
Assessment Tool

Your website - Deep dive

Does your website effectively communicate your mission, programs, and impact to visitors?

- ☐ Yes
☐ No
☐ I don't know

Do you regularly review and update the content on your website to ensure it remains accurate and engaging?

- ☐ Yes
☐ No
☐ I don't know

Is your website USER-FRIENDLY?

- ☐ Yes
☐ No
☐ I don't know

Is your website UP TO DATE?

- ☐ Yes
☐ No
☐ I don't know

Is your website MOBILE RESPONSIVE?

- ☐ Yes
☐ No
☐ I don't know

Is your website INCLUSIVE?

- ☐ Yes
☐ No
☐ I don't know

Is your website ACCESSIBLE?

- ☐ Yes
☐ No
☐ I don't know
- 

Section 8:
Are you a thought leader? Are you
present online?

Are you a thought leader? Are you present online?

Have you reflected well on your online presence, your brand authority and your communication? Did you have all the answers and were they positive? Based on your reflections, give your organization an overall rating on the question: Are you a thought leader, and leader online?



Get the proper support to assert your presence

- Consistently deliver on your promises and mission to build and maintain a strong brand.
- Actively engage with your community and target audience to strengthen your brand's relevance and impact.
- Develop a brand strategy and communication plan that aligns with your mission and values. Outlines how you will share your organization's story and impact with your audience.
- Focusing on online presence is a crucial step in today's digital world. It can help organizations ensure that they effectively leverage the power of online communication to connect with supporters, raise awareness, and drive their mission forward.
- Ensure your website is up to date, user-friendly, accessible and that it reflects your mission and impact effectively.
- Regularly evaluate your social media strategy to engage with your community and share your organization's work.

Use this space to summarize your notes about your communication

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Time for Your Action Plan

**Take a moment to congratulate yourself and the team with you!
You have gone through the different elements of sustainability!**





ACTION PLAN

The Sustainability Assessment Tool

Recapture the rating for each section's question, and copy it below. That will give you a comprehensive idea about your organization's sustainability elements. At this point, you don't only have a well-informed rating for each element, but you can also give examples to justify your answers! You can share this with your stakeholders.

Are you flexible and strategic?



Are your leaders leading well?



Do you have diverse reliable revenues?



Are you responsive, inclusive and knowledgeable?



Do you have the right technology?



Are you collaborative?



Do you have a resilient team?



Are you a thought leader? Are you present online?





ACTION PLAN

The Sustainability Assessment Tool

Let's identify areas where your organization demonstrates strength and areas where there is room for improvement.

This will serve as a starting point for developing your action plan. Remember that you can always consult with an expert to help you in these planning exercises. These are some questions to guide you:

- What are questions to which you had limited answers? What answers did you feel less confident to give?
- What are our biggest bottlenecks within your organization? What areas require immediate attention?
- What actions are the most feasible and cost-effective to undertake? Where can we make the most significant improvements?
- What aligns with our organization's mission and strategic goals?
- What team capacity can we build? What are existing strengths?
- What are the biggest threats within our context?
- What are major opportunities arising in our context?

Consider the allocation of resources, whether it's financial, human resources, or time, to support the implementation of your action plan. Ensure that resources are aligned with your sustainability priorities.





Your Goals and Priorities

PRIORITIES/GOALS	Timeline	Who is responsible	Resources



Congratulations!

You've made it this far! Take a moment to recognize and celebrate your organization's achievements and strengths.

Acknowledge the progress you've made and the positive impact you've had.

Remember that sustainability is an ongoing process. Growth and impact require a commitment to continuous improvement and adaptability.



Don't forget to...

- **Keep records of your progress and evolution. Maybe set a reminder too look at your scores and actions in a year?**
- **Revisit your strategy, operations and programs periodically to adapt to changing circumstances and emerging priorities.**
- **Involve community member and partners around your mission!**

We're here for you

This tool has been brought to you by our amazing team at Yamm Services Inc.

Do you have questions for us?

Visit [our website](#) to read more

Or contact us on info@yammservices.com

Our team will be happy to answer your concerns and look for ways to help you assess and make strides towards your sustainability

*At Yamm Services, we unlock the
potential of impactful organizations to
shine and grow!*

Change is constant, right? With this in mind, we wish you a smooth journey as you navigate today's contexts. We appreciate your efforts and we are here so that you can achieve a lasting and brilliant impact. Get in contact with us if you need support!