



**SUPPORTING ORGANIZATIONAL SUSTAINABILITY INSTITUTE  
(SOS INSTITUTE)**

**ORGANIZATIONAL INFRASTRUCTURE REVIEW & NEEDS ASSESSMENT**

This form is intended to help the staff of the Supporting Organizational Sustainability to Address Violence Against Women (SOS) Institute address the needs your organization has regarding infrastructure and organizational health. **This form can also be used as a tool for you to assess organizational gaps and needs.** This document is for internal purposes only. You do not have to complete the entire form if pieces are inapplicable, and if you would prefer to share this information verbally, we can arrange to speak via telephone.

This form is also available online: <https://www.surveymonkey.com/r/SOSneeds>.

Please send this form and any questions to Mónica Arenas:  
marenas@futureswithoutviolence.org, Tel: 415-678-5519.

**Organization:** \_\_\_\_\_

**Name:** \_\_\_\_\_ **Title:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **Org. Number Years:** \_\_\_\_\_ **Staff Number:** \_\_\_\_\_

**E-mail address:** \_\_\_\_\_ **Telephone:** \_\_\_\_\_

Below is a list of organizational infrastructure elements and practices that strengthen and support an organization to succeed, be stable, and live their mission. We hope that this is helpful in assessing which organizational infrastructure areas you may want to work on and get support and resources.

<b>ASSESSMENT CODES PLEASE MARK BELOW</b>	
Strongly Disagree	1
Disagree	2
Neither Agree or Disagree	3
Agree	4
Strongly Agree	5

<b>ORGANIZATIONAL MISSION &amp; CORE VALUES</b>	1	2	3	4	5	N/A
❖ Our mission statement is relevant, meaningful, and has a clear purpose. It is reviewed by the board regularly.						
❖ We have a set of core values from which we guide our work and organizational culture, written or unwritten.						
❖ We have a process to integrate and align our mission and core values with our programs and organizational infrastructure.						

<b>POLICIES &amp; CULTURE</b>	1	2	3	4	5	N/A
❖ Organizational policies reflect the mission and values of our organization.						
❖ Workplace policies facilitate a positive, inclusive, diverse, healthy and efficient organizational culture.						
❖ The culture of our organization is defined and aligned with our values, and led by actions/behaviors of leaders.						
<b>PLANNING: SHORT &amp; LONG TERM</b>						
❖ We have a strategic plan with goals and objectives that align with the organization's mission and core values.						
❖ We have an annual operations work plan with activities, timelines, staffing, program needs and outcomes, and committed resources.						
❖ We have staff development plans that are aligned with the organization's mission and priorities.						
❖ We have a process to follow through and evaluate the progress of our work plans (strategic, annual and daily).						
<b>REGULAR PROGRAM REVIEW</b>						
❖ We engage in program evaluations that involve staff, partners, community and the board.						
❖ We have a process of keeping data, including tracking time spent on projects and information regarding efficacy of services.						
❖ We engage in regular program evaluation in terms of mission impact, effectiveness, and sustainability.						
<b>ORGANIZATIONAL TRANSITION &amp; SUCCESSION PLAN</b>						
❖ We have a leadership succession plan that builds the internal capacity of staff, including a crisis and strategic succession plan.						
❖ We have a process to support staff with transitions and organizational changes.						
<b>HUMAN RESOURCES, STAFF DEVELOPMENT &amp; RETENTION</b>						
❖ The organization's recruitment, on-boarding, engagement, training, evaluation, and retention of staff reflect the organization's mission, organizational needs, and staff expertise.						
❖ We have clear job descriptions and roles, and conduct annual performance reviews for all staff members.						
❖ Staff positions have appropriate salaries and professional development opportunities.						
❖ The organization builds supports ongoing professional development of staff.						
❖ The organization encourages and ensures implementation of trauma-informed practices that support work-life balance and the personal needs of all staff, including trauma-informed self-care.						

<b>INTERNAL COMMUNICATION</b>	1	2	3	4	5	N/A
❖ We promote healthy practices of communication and conflict resolution within the organization.						
❖ The organization has a process for resolving grievances and miscommunications.						
❖ Staff and board have clear communication lines and standards.						
❖ The organization's internal policies, mission, and other information is shared with the staff on a regular basis.						
<b>EXTERNAL COMMUNICATION</b>						
❖ We have a communication plan with clear goals and audiences, which is intentional, strategic, and planned.						
❖ We use consistent branding, storytelling, style (font, colors, and logo).						
❖ We use current communication strategies.						
<b>BOARD &amp; GOVERNING BODY</b>						
❖ Our board know and have clear roles and responsibilities in the development of our organization.						
❖ Our board is engaged, knowledgeable of the organization's projects, and has a work plan.						
❖ Our board composition is diverse, balanced and effective to meet the needs of the organization.						
❖ The board has a process for evaluating their work, recruiting new members, orientation, and team building.						
❖ Our board is engaged in the financial sustainability of the organization.						

Key things or issues that surfaced and that you think your organization needs assistance with:

Assistance, resources or information that would be helpful:

Additional comments or notes: