

Are You Sustainable: A Self-Directed Assessment Tool

What: This self-directed assessment tool should provide opportunities for both discussion and benchmarking among board, staff, and organization leaders.

Who Should Take It: This tool is probably best used as a group exercise, with a group of staff and board addressing each question jointly. A discussion of each point, including agreement on a point score, will lead to productive discussions and help those with less experience and/or knowledge of the organization to be on the same page as the organization's leaders. Of course, if a group exercise is not possible, an organization might choose to have its leaders take this survey individually, and then compare and discuss their notes at a later meeting. Either way, it should be used as a tool to assess, in a general way, an organization's strengths and weaknesses.

How To Take It: Each question asks you to make a judgment ranking of anywhere between 1 and 5. In all cases, a 1 will indicate "no" or "not much" or "disagree strongly." A 5 will indicate "yes" and "agree strongly."

Interpreting Your Results: Total up your points for each section, and then add up your total for all sections. On the final page of this document are suggestions for how to interpret your results.

Public Trust and Accountability (40 points possible)

- Our organization has identified primary and secondary audiences. **1 2 3 4 5**
- Our organization is a good member of the neighborhood. **1 2 3 4 5**
- Our organization is open / inclusive to participation by diverse audiences. **1 2 3 4 5**
- Our organization operates with transparency in all aspects of operations. **1 2 3 4 5**
- Other organizations invite our leaders, board and staff, to participate in their programs or serve in other capacities. **1 2 3 4 5**
- If our organization closed, the community would miss our presence. **1 2 3 4 5**
- Our organization actively collaborates with other organizations, including non-history organizations. **1 2 3 4 5**
- Our organization is known, visited by, and supported by local government leaders. **1 2 3 4 5**

Your Point Total:

Leadership and Governance and Human Capital (70 points possible)

- Our organization's leadership is well-aware of best practices of the field. **1 2 3 4 5**
- Our board has moved beyond the first generation of leaders. **1 2 3 4 5**
- Our organization has a relatively easy time in recruiting board members. **1 2 3 4 5**
- Our organization has board term limits and enforces them. **1 2 3 4 5**
- Our board members represent a mix of experienced and new members. **1 2 3 4 5**
- Our board's demographic makeup reflects that of the community **1 2 3 4 5**
- Our board members clearly understand their roles and responsibilities. **1 2 3 4 5**
- Our board and staff, especially the executive director, work well together. **1 2 3 4 5**
- Our organization has written personnel policies adopted by the board **1 2 3 4 5**
- Our board evaluates the performance of the director on an annual basis **1 2 3 4 5**

Our organization has adopted a code of ethics and reviews it with every new Board member. **1 2 3 4 5**

The work of our organization is well supported by volunteers. **1 2 3 4 5**

Key staff members (if any) are well qualified and well supported by the organization. **1 2 3 4 5**

Key staff members are encouraged and supported in participating in professional development opportunities. **1 2 3 4 5**

Your Point Total:

Mission, Planning and Public Engagement (50 points possible)

The organization's mission is well known inside and outside the organization. **1 2 3 4 5**

The mission is reviewed by the board and staff at least every three years **1 2 3 4 5**

The organization has a vision statement that is inspiring. **1 2 3 4 5**

Our organization's leadership is unified in its understanding of the mission. **1 2 3 4 5**

Our organization regularly engages in planning beyond routine planning, i.e., strategic and long range planning. **1 2 3 4 5**

Our organization is well known in the community. **1 2 3 4 5**

Our organization actively promotes itself through traditional and social media. **1 2 3 4 5**

Staff members are adept at using modern media. **1 2 3 4 5**

Our organization makes good use of social media and the internet to reach a wide audience. **1 2 3 4 5**

Our organization's web site is up to date and easy for the public to use. **1 2 3 4 5**

Your Point Total:

Education, Exhibits, Interpretation (30 points possible)

- The collections, exhibits, and programs are not dominated by the pioneer era and agricultural history of our region. **1 2 3 4 5**
- The history of our community, as taught in our organization, relate to state and national historical trends. **1 2 3 4 5**
- Our exhibits and programs are well attended and supported by the local community. **1 2 3 4 5**
- Our organization receives loans of material, financial support, and in-kind donations for exhibits and programs. **1 2 3 4 5**
- The local school system plans student field trips to our organization. **1 2 3 4 5**
- Our organization participates in a local history day. **1 2 3 4 5**

Collections Stewardship (25 points possible)

- Our historical collections are cared for according to best practices of the field. **1 2 3 4 5**
- Our historical collections represent the current demographics of the community. **1 2 3 4 5**
- Community members regularly offer new materials to our organization. **1 2 3 4 5**
- Our historical collections are easily located and accessible by staff and qualified researchers. **1 2 3 4 5**
- Our organization uses computerized methods such as Past Perfect to care for and access its historical collections. **1 2 3 4 5**

Financial Stability (50 points possible)

- Our organization is a responsible steward of the money it receives/spends. **1 2 3 4 5**
- Our organization prepares financial statements that are reviewed by staff and board on at least a quarterly basis. **1 2 3 4 5**
- Our organization generally has a balanced budget. **1 2 3 4 5**

Our organization has a sufficient endowment fund and/or reserve fund to withstand an emergency. **1 2 3 4 5**

Our organization has a planned giving program that adds money to the endowment. **1 2 3 4 5**

Our organization has an annual independent audit. **1 2 3 4 5**

Our board and staff work together to generate revenue for the organization. **1 2 3 4 5**

Board members make personal donations and actively solicit gifts for the organization **1 2 3 4 5**

Our organization receives annual funds from the city, county, or state. **1 2 3 4 5**

Our organization receives steady financial and in-kind support from the public. **1 2 3 4 5**

Your Point Total:

Facilities Care (15 points possible)

Our organization is a good steward of its facilities. **1 2 3 4 5**

Our organization has resources to monitor and take care of routine maintenance Issues. **1 2 3 4 5**

If major capital repairs are needed, we have one or more reliable sources for those funds. **1 2 3 4 5**

Your Point Total:

Point Total For All Sections:

Evaluating Your Score

There are 280 possible points. A total score of 200 or more indicates that your organization is doing well and is likely sustainable. A score of at least 196 is a positive response in the 70% range, which might be regarded as a minimum level indicating future sustainability. A score below 168 shows that your organization should have some serious discussions about strengths and weaknesses, and how to address the weaknesses.

Most organizations will score better in some areas than in others, but you might regard a 70% level as being a good starting point.

Public Trust and Accountability	(40 points possible---70% =28
Leadership and Governance	(70 points possible---70% = 49)
Mission, Planning and Public Engagement	(50 points possible---70% = 35)
Education, Exhibits, Interpretation	(30 points possible---70% =21)
Collections Stewardship	(25 points possible---70% = 18)
Financial Stability	(50 points possible—70% = 35)
Facilities Care	(15 points possible---70% = 11)