

SECTOR TRANSFORMATION

This rubric offers a general overview of the health status scores (weak, developing and healthy) for the 10 areas of organizational effectiveness assessed in the assessment tool.

	Weak (Scores: 1-2)	Developing (Scores: 3)	Healthy (Scores: 4-5)
Data & Evaluation	<ul style="list-style-type: none"> - Little to no data collection - Reliance on anecdotes for reporting - Evaluation done only for funders - No systems for learning or improvement 	<ul style="list-style-type: none"> - Some data collected but inconsistent - Evaluation tools exist but underutilized - Data sometimes informs decisions, but not systematically - Learning culture emerging 	<ul style="list-style-type: none"> - Strong data systems in place - Evaluation embedded across programs - Data consistently informs strategy and improvement - Organization fosters culture of learning and accountability
Effective Leadership	<ul style="list-style-type: none"> - Leaders reactive and crisis-driven - Limited or no clear vision - Poor or one-way communication - Little staff trust in leadership 	<ul style="list-style-type: none"> - Leaders articulate a partial vision but not consistently - Communication happens but lacks clarity or transparency - Leaders somewhat accessible, but limited empowerment of staff 	<ul style="list-style-type: none"> - Leaders communicate a clear and compelling vision - Inspire trust and transparency - Encourage staff input and leadership at all levels - Proactive and strategic in decision-making
Financial Health & Planning	<ul style="list-style-type: none"> - Reliant on 1–2 unstable funding sources - No reserves or financial cushion - Budgets created for survival only - Weak or absent financial oversight 	<ul style="list-style-type: none"> - Funding somewhat diversified but still fragile - Limited reserves (1–2 months) - Budgets include some projections but short-term focused - Financial oversight exists but not rigorous 	<ul style="list-style-type: none"> - Revenue streams are diverse and stable - Healthy reserves (3–6+ months) - Multi-year budgets and financial planning in place - Strong financial oversight and risk management
Internal Culture	<ul style="list-style-type: none"> - Low morale and mistrust - Silos between departments/teams - Lack of transparency from leadership - Toxic or exclusionary behaviors tolerated 	<ul style="list-style-type: none"> - Culture-building efforts underway but inconsistent - Some cross-team collaboration - Transparency improving but not universal - Recognition of staff efforts sporadic 	<ul style="list-style-type: none"> - Collaborative and inclusive culture - Staff feel safe, respected, and valued - Open communication and transparency at all levels - Recognition and appreciation systems embedded
Organizational Structure	<ul style="list-style-type: none"> - Roles unclear or overlapping - Decision-making concentrated at the top - No accountability systems - Frequent confusion and inefficiency 	<ul style="list-style-type: none"> - Some roles and processes defined, but gaps remain - Decision-making sometimes bottlenecked - Accountability informal or inconsistent - Occasional duplication of efforts 	<ul style="list-style-type: none"> - Roles/responsibilities clearly defined and documented - Decision-making appropriately distributed - Accountability systems formalized - Structure adapts as organization grows

SECTOR TRANSFORMATION

Continued

Weak (Scores: 1-2)

Developing (Scores: 3)

Healthy (Scores: 4-5)

Partnerships & Collaboration	<ul style="list-style-type: none"> - Organization isolated from peers - Relationships are transactional - Viewed as competitive rather than collaborative - Limited external influence 	<ul style="list-style-type: none"> - Some partnerships exist but not strategic - Relationships inconsistent or shallow - Limited engagement in sector networks - Collaboration happens occasionally 	<ul style="list-style-type: none"> - Strong and strategic partnerships - Active leadership in networks/coalitions - Shares resources and knowledge with peers - Recognized as a trusted collaborator in the sector
Program Sustainability & Adaptability	<ul style="list-style-type: none"> - Programs tied mainly to funder requirements - Not responsive to community needs - Cannot adapt to changing environment - Risk of collapse if funding shifts 	<ul style="list-style-type: none"> - Programs somewhat aligned with mission but inflexible - Limited community input - Some adaptability but slow to respond to change - Sustainability uncertain without specific funders 	<ul style="list-style-type: none"> - Programs strongly aligned with mission - Designed with community input and needs - Adaptive and responsive to sector changes - Supported by diverse and sustainable resources
Racial Justice Integration	<ul style="list-style-type: none"> - DEI or equity work absent or superficial - Leadership/board not representative - Policies and practices reinforce inequity - Bias or discrimination unaddressed 	<ul style="list-style-type: none"> - DEI training or initiatives exist but are inconsistent - Some diversity in staff/board but not reflected in leadership - Equity considered occasionally but not embedded in decision-making 	<ul style="list-style-type: none"> - Racial equity integrated across mission, policies, and practices - Leadership and board reflect community diversity - Regular equity training and accountability systems in place - Organization recognized for equity commitments
Staff Capacity & Workflow	<ul style="list-style-type: none"> - Staff stretched thin, unrealistic workloads - High turnover and burnout - Little to no professional development - Processes inefficient or undefined 	<ul style="list-style-type: none"> - Adequate staff but workloads uneven - Some professional development opportunities, but limited access - Turnover moderate - Workflows somewhat defined but inconsistently applied 	<ul style="list-style-type: none"> - Staffing sufficient for mission and workload - Staff retention strong, with clear pathways for growth - Regular training and professional development - Well-designed, efficient workflows support productivity
Strategic Planning	<ul style="list-style-type: none"> - No plan or outdated plan - Goals vague or disconnected from mission - Plan not shared with staff/board - Not used for decision-making 	<ul style="list-style-type: none"> - Strategic plan exists but not reviewed regularly - Staff/board involvement uneven - Goals measurable but not fully tracked - Plan informs some decisions but not daily operations 	<ul style="list-style-type: none"> - Strategic plan is clear, realistic, and measurable - Developed with staff and community input - Regularly reviewed and updated - Actively used to guide decisions and priorities