



CAPACITY & FLEXIBILITY CHECKLIST

Future-Proof Your Mission by Strengthening What's Behind the Scenes

In today's climate of political volatility, economic uncertainty, and rapid social change, rigid systems won't protect your mission – *but flexible ones will*. This checklist is designed to help leaders assess whether their current infrastructure supports clarity, adaptability, and sustainable growth. Check the boxes that apply to your organization today. Use the results to identify your strengths, gaps, and areas for immediate improvement.

SYSTEM DESIGN & STRATEGY

- ☐ We revisit our strategic plan quarterly and adjust based on changing conditions
- ☐ Our systems are modular – built to evolve without full overhauls
- ☐ We have multiple scenarios mapped for key funding, staffing, or political changes
- ☐ Strategic decisions can be made quickly with clear delegation and accountability
- ☐ We have a plan for sunseting outdated programs or systems

Action area: _____

PEOPLE & CULTURE

- ☐ Staff feel safe suggesting improvements or raising concerns about systems
- ☐ We have documented workflows that reduce dependency on specific individuals
- ☐ Our team is cross-trained to support business continuity during absences or turnover
- ☐ Managers are trained to lead through ambiguity, not just execution
- ☐ Change management is a shared competency, not just a top-down directive

Action area: _____

DATA & DECISION-MAKING

- ☐ We have real-time or near-real-time dashboards for key metrics
- ☐ We use both quantitative and qualitative data to inform decisions
- ☐ Data is shared transparently across teams to support learning and adaptation
- ☐ We have regular reflection points to assess progress and pivot if needed
- ☐ Evaluation is built into programs from the start – not just at the end

Action area: _____



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OPERATIONS & CAPACITY

- ☐ We review capacity at least quarterly across departments and teams
- ☐ We've identified single points of failure and have back-up plans in place
- ☐ We can scale operations up or down without major disruption
- ☐ We have flexibility built into our tech tools, platforms, and vendor contracts
- ☐ Staff workloads and project timelines are regularly reviewed and adjusted

Action area: _____

MISSION ALIGNMENT & ADAPTABILITY

- ☐ We review our mission and values as part of operational planning
- ☐ Every major system or process is evaluated for alignment with our purpose
- ☐ We're open to new delivery models, partnerships, or approaches to meet the moment
- ☐ We stay mission-aligned even when we adapt strategy or programming
- ☐ Innovation is encouraged, not seen as a risk to stability

Action area: _____

Results Snapshot:

- ☐ **20–25 boxes checked:** Your systems are well-positioned for resilience and evolution. Focus on fine-tuning and sharing practices across your organization.
- ☐ **15–19 boxes checked:** You have a solid foundation, but there are key areas to strengthen before the next disruption hits.
- ☐ **10–14 boxes checked:** Your systems may be holding back growth or agility – time to prioritize structural shifts.
- ☐ **Fewer than 10 boxes checked:** You may be at risk. Let's talk – your mission deserves a more resilient infrastructure.

Want help reviewing your checklist results or prioritizing action steps?

[Contact us](#) or email jrider@hera-associates.com or dgayle@hera-associates.com to schedule a free 30-minute strategy call.

Together, we'll build a stronger, more flexible foundation for your mission.



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