



**Stanislaus
Equity Partners**

Stanislaus Equity Partners Strategic Plan

May 31, 2023



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STEP's Vision:

STEP works to create a Stanislaus County where all residents are able to participate and thrive in a life with hope and dignity.

Executive Summary

Stanislaus Equity Partners (STEP) CDC was launched in early 2021 after the completion of a feasibility study by CCEDA. STEP CDC has achieved significant progress in the first two years of existence including completing several housing initiatives. Early 2023 is a good time for STEP to undertake a strategic planning process to assess the various strategies, organizational alignment and systems needed to keep up with the development projects, and the strategic direction of the organization given the fact that the Founding CEO is planning on retiring in the next 12 months. Robert Zdenek the consultant for the STEP Feasibility Study teamed up with Wendy Ryan CEO of Kadabra to conduct the plan under the auspices of CCEDA. The consultants did extensive research, interviewed a dozen leaders, convened four stakeholder collaboration sessions and brought together the board and staff for a day-long meeting. The net result is the approval of a number of major recommendations for the STEP Board to oversee and the STEP staff to implement between 2023 and 2028. There are numerous charts and references attached to the document. The STEP Strategic Plan is designed to be an active strategic plan and every year STEP will review the strategic plan recommendations and actions and make appropriate changes. A board strategic planning committee will oversee the implementation and analysis of the progress on the plan. This strategic planning process engaged dozens of stakeholders and leaders throughout Stanislaus County.

Overview

Stanislaus Equity Partners (STEP CDC) was founded in 2021. The STEP Executive Team and Board of Directors decided to develop the first strategic plan for the organization in partnership with the California Community Economic Development Association (CCEDA) which did the first feasibility study for the City Ministry Network (CMN) in the Fall of 2020. Both STEP and CCEDA selected Robert Zdenek in partnership with Wendy Ryan, CEO of Kadabra to lead the strategic planning process. Bob was the Principal Investigator for the CMN feasibility study for creating a CDC under the auspices of CCEDA.

The strategic planning process aims to develop a five-year strategic plan (2023-2028) for STEP CDC that builds upon their excellent start combining key organizational alignment issues and strategies with programmatic growth. Joe Duran, the founding CEO, who has been integral to the creation and growth of STEP has announced that he will be retiring in the next 12 months. Succession planning will be an essential part of the strategic planning process,

resulting in a separate document. The consultants recommend that STEP CDC establish strategic planning and search committees and connect their work. The purpose of the strategic planning committee is to review the plan on an annual basis and consider appropriate revisions. The search committee will be responsible for selecting the new CEO.

Background

The CMN CDC feasibility study recommended launching a new CDC for Stanislaus County in 2021, which became STEP CDC. With support from CMN, STEP opened its doors in the Spring of 2021. Several CMN staff and consultants became initial staff for STEP CDC, notably Joe Duran as CEO and Jessica Filbrun as COO. STEP acquired South Modesto Community Partnership which was a 501 © 3, giving them an existing organization to build from. STEP formed a strong board of over 15 board members from a mixture of CMN, South Modesto Partnership, and other community and civic leaders.

Within six months of existence, STEP CDC had secured a \$5 million grant from Stanislaus County which is highly unusual for a new CDC. STEP was able to hire a talented core staff to move forward in affordable housing and small business development. In the first 18 months, STEP CDC has developed. Again, this is impressive and rare for a new CDC.

Modesto's economic and social trends are above average in terms of negative factors. Recent data showed that the unemployment rate was 10.5% percent above the state average and 15.9% of the residents were poor with 27.5% of children living in poverty in West Modesto. Over 77% of renters are low-income, and only 55% homeownership rate is well below the state and national level. The median value of the housing is \$431,000, very affordable by most California standards. 95% of the housing units are occupied which is 7% above national standards.

Modesto recently adopted a housing plan with the goal of 11,248 additional units by 2030. There are 670 opportunity sites for development. This provides an opportunity for STEP CDC. The primary goal is housing choices and affordability. One of the major goals is to create more density and variety of housing since most family units do not have children.

More promisingly, there are 13,728 business owners in Modesto with 4,767 women-owned businesses and 5,115 minority-owned ones. The number of business owners provides significant opportunities for STEP's small business initiatives.

STEP CDC has so far thrived in terms of political and policy relationships due to the executive staff and board leadership, notably Joe Duran the CEO, and Marvin Jacobo, the Executive

Director of CMN and Board Chair of STEP. The organization has leveraged its initial \$5 million dollar grant from the County to raise an additional \$10 million in funding, mostly from the public sector. Over time, the goal is to develop a more balanced funding stream of public sources, private sources, fees, and fund balance from STEP's balance sheet.

STEP's initial focus has been on affordable housing development. One of their initial projects was James Street which is 7 units of permanent supportive housing that has 15 to 20 residents. STEP has also been active in tiny homes and they completed Bridge Court which is 9 to 10 micro homes and 4 to 6 single family tiny units. They have partnered with Free Will Baptist Church and have provided financing and technical assistance. Riverbank is another location where STEP has partnered with a church. This opens an important opportunity for STEP CDC to access underutilized church property for low-income housing with diverse congregations.

STEP CDC has a strong focus on leveraging partnerships and has already started to work with two large regional affordable housing developers and CDCs including Visionary Homebuilders in Stockton and Self-Help Enterprises in Visalia. STEP and Self-Help Enterprises are partnering on Morris Village, which will be a 45 rental unit project involving the low-income housing tax credit targeted to families below 60% median income. STEP CDC is well-positioned to expand affordable housing and small business enterprises throughout Stanislaus County and needs to continue to develop organizational capacity, programmatic expertise, and resource diversification. STEP CDC has been in existence for less than two years, and it takes time to build capacity, processes, and systems while the organization is implementing projects.

STEP CDC already has the success of an organization that has been in existence for three to five years with completed projects and several major projects in the pipeline. STEP CDC will need to pay careful attention to ensure that it has the competencies and capacities to meet its powerful vision. The strategic planning process will heavily emphasize organizational alignment balancing aspirational goals.

Process and Key Findings

STEP CDC and the consultant team of Bob Zdenek and Wendy Ryan designed the strategic planning process. The first stage of the process consisted of one-on-one interviews with the two executive leaders (Joe and Jessica), interviews with most of the senior staff, and board chair Marvin Jacobo. The purpose of these interviews was to provide important insights for the consultants around key issues that would need to be addressed in the strategic planning process.

Organizational Assessment Interviews

Key findings from the interviews included:

- Staff are clear and strongly committed to STEP’s Vision, Mission and Core Values
- Staff do not have deep expertise in operating CDCs or in some key areas, such as housing development, that will be important for them to build or STEP to acquire quickly to support scaling and sustaining its current initiatives.
- Organizational maturity is similar to what we would expect to see with an organization less than two years old. The age of an organization in terms of its lifecycle is not based on its chronological age, the number of staff, or the size of its assets. Lifecycle age is defined by the interrelationship between flexibility and control.
- According to Ichak Adizes Organizational Life Cycle Model, STEP is currently progressing from Early Childhood into the Adolescence phase. (See Appendix F)
- Despite STEP’s clear successes with project completion to date and planned projects in its pipeline, organizational design, talent development, IT systems, facilities, as well as the development of core processes and procedures have not kept pace.
- As Founder and CEO of STEP, Joe Duran’s leadership style has been highly effective in driving community interest, stakeholder goodwill and significant funding during the organization’s Infancy and Early Childhood stages of development. Heading into the next phase of its lifecycle, it will be important for Joe’s successor to demonstrate the mindsets, skill sets and behaviors associated with successfully navigating an organization through Adolescence and into Prime.

Stakeholder Collaboration Sessions

The next stage was to leverage four powerful strategic visioning tools from The Grove’s Strategic Visioning Process. The tools used were the SPOT Analysis, Cover Story Vision, Journey Vision Exercise and Five Bold Steps. Five stakeholder collaboration sessions were facilitated for the purpose of completing these exercises - one for the SPOT Analysis, one for the Cover Story Vision, two sessions for the Journey Vision Exercise and one session to complete Five Bold Steps

A. SPOT Analysis (Strengths, Problems, Opportunities, and Threats)

A SPOT Analysis is a modified version of a classic SWOT. Strengths are internal in what we do well; problems are internal and solvable; opportunities build upon our strengths, and threats are external beyond our control. (See Appendix A for a complete list of strengths, problems, opportunities, and threats generated by stakeholders for STEP).

The role of the SPOT Analysis in strategic visioning and planning is to align stakeholders around current realities for the organization.

Some of the major strengths the group identified are the absence of groupthink on the board, and the diversity of the board. STEP has built a reputation as a “can-do” organization, and STEP has developed a strong organizational culture in a short period of time.

Problems include the leadership is aging, transition with Joe planning to retire, lack of data, and overdependence on public resources,

There are many opportunities for STEP to tell the story and results better, identify underutilized church properties, establish new funds, build capacity to develop more projects, be a leading voice in the community, and develop long-term sustainability.

Potential threats consist of changing leadership in the county, new funding interests, changing financial institution relationships, and competition from other organizations.

Through the lens of the SPOT Analysis, stakeholders recognize how solving organizational problems can become strengths and/or enable new opportunities. Current realities co-exist in dynamic relationship with one another such that a change in one quadrant on the SPOT Analysis will affect the other three.

B. Cover Story Vision

The Cover Story Vision exercise is designed to help stakeholders “dream big” about what might be possible for the organization to achieve in the future; The four key elements of the Cover Story Exercise are brainstorming, quotes, sidebars, and big headlines (see Appendix B)

Brainstorming suggestions included STEP emerging as a leading social enterprise, creating a microenterprise loan fund, and having the Small Business Development Corporation (SBDC) expand outreach in the Latino Community.

A few of the many imaginary quotes were:

- *I trust STEP to do the right thing with my \$100 million dollar grant- McKenzie Scott*
- *Working with STEP reduced my program costs and expanded my clientele*
- *I became a first-time homeowner and am proud of my community.*

A big headline stakeholders imagined was “STEP helps break intergenerational poverty through economic opportunity in Stanislaus County.” Another was “STEP provides the opportunity to create more Black and Brown developers.”

C. Journey Vision

Two small groups focused on STEP’s Vision for 2028. The major vision statement proposed was: “to create a Stanislaus County where all residents are able to participate and thrive in a life with hope and dignity.”

The three major pillars of STEP’s current vision are housing, small businesses, and connections. Each of the pillars has a draft vision consisting of actions (key initiatives), and outcomes (vision elements) including how you measure the success of the initiatives (see Appendix C)

Proposed key initiatives are succession planning, securing a new facility, social enterprise accelerators, a microenterprise loan fund, and a housing summit. Suggested outcomes are breaking the cycle of poverty; rewriting the playbook for community prosperity; creating opportunities for Black and Brown developers; and engaging all the faith communities in healing.

Another key element in the draft 2028 STEP vision plan are measurements that enable STEP to evaluate its progress in the next five years. The measurements vary from the number of new rental and homeownership units, businesses supported and jobs created to new local and regional community partners to additional financial and technical assistance resources attracted from sources outside of Stanislaus County.

D. Five Bold Steps

On April 21, Roberto Barragan from CCEDA and STEP’s Board of Directors met for a full day retreat to review a draft of the Strategic Plan’s key findings and recommendations and to prioritize them. Staff were invited to join the latter half of the Retreat so they could participate with board members in the Five Bold Steps exercise.

The Board first identified five of the ten recommendations from the draft Strategic Plan as its top priorities, or Vision Elements. Working in small groups, board and staff members together brainstormed Year One milestones and projects that would be required to advance Vision 2028. (See Appendix D).

Going forward, we recommend that STEP’s leadership team repeat and refresh its Five Bold Steps annually in collaboration with its staff members. This will ensure that forward momentum toward Vision 2028 continues and that key stakeholders remain engaged.

Recommendations

Research, interviews, and the stakeholder collaboration sessions described above have led to some major proposed recommendations for the new strategic plan. The top five recommendations act as Vision Elements which together describe STEP's desired future state - also known as Vision 2028. Listed in order of their priority according to the Board, the five Vision Elements are:

1. **Organizational structure plan-** STEP has already completed several housing initiatives and has a few housing projects in the pipeline. It has been challenging to develop organizational and administrative systems while all the projects are moving forward. STEP needs to devote more resources to organizational processes and systems in the next 12 to 18 months. Specifically, STEP needs to refine and operationalize criteria for making decisions. Aligning the organization is especially critical as it goes through a leadership transition in the next 12 months.
2. **CEO transition-** Joe Duran announced recently that he is planning to retire in the next year. It is critical to have a CEO succession and organizational change management plan in place before the search process commences. Succession plans evaluate current leadership and management strengths and weaknesses in the context of organizational maturity and its strategic plan to identify what would be required to implement a successful CEO transition. This could include recommending additional leadership or organizational changes, identifying qualities and qualifications for the next CEO and outlining an onboarding process for the new CEO. The organizational change management component of the plan addresses key success factors for change and transition, including change sponsorship, role clarity, stakeholder communication, managing change resistance and reinforcement. Robust succession planning and change management will be required for STEP to continue moving forward in a significant way without losing the momentum it has built since its inception.
3. **Funding balance and strategy.** Currently, STEP is largely dependent on Stanislaus County Public Funding Sources as its primary funding source. STEP has limited operational capital to fund its general operations, which is consistent with other emerging CDCs. As the organization grows and assets increase, it will be important for STEP to diversify funding sources and generate sufficient returns on capital to fund its operations. STEP CDC can learn from the experience of other CDCs in California through support from CCEDA. STEP's quarterly convening of CRA officers is a promising development that could lead to more financial resources for STEP and other community development initiatives in Stanislaus County.
4. **Relationships and Trust-** STEP CDC has excelled in developing strong relationships and trust with residents and key stakeholders in the community and beyond. Most of these relationships currently rely on Joe and Marvin's stewardship. It is important to

transition stewardship of key relationships to other staff and board members. Joe and Marvin will be transitioning out in the next 1 to 3 years, and there is an opportunity to broaden relationships with new players at STEP and stakeholders.

5. **Core Competencies-** Bob Zdenek and Dee Walsh's book, *Navigating Community Development* identifies core competencies for CDC leadership and strategic partnerships. STEP needs to be strategic in terms of which core competencies it develops. At the retreat, the board members talked about collaboration, financial structuring, development process, and maintaining community relationships.
. Partnerships are an excellent way to acquire the competencies needed for community development projects. STEP has expressed interest in doing a future exercise with the consultant team to identify core competencies for the organization.

There were additional Plan recommendations that were identified and validated by Board members at the April 21 Board Retreat and together with the top five listed above, we have summarized into three major categories:

A. Leadership

1. **CEO transition*** - Joe Duran announced recently that he is planning to retire in the next year. It is critical to have a CEO succession and organizational change management plan in place before the search process commences. Succession plans evaluate current leadership and management strengths and weaknesses in the context of organizational maturity and its strategic plan to identify what would be required to implement a successful CEO transition. This could include recommending additional leadership or organizational changes, identifying qualities and qualifications for the next CEO and outlining an onboarding process for the new CEO. The organizational change management component of the plan addresses key success factors for change and transition, including change sponsorship, role clarity, stakeholder communication, managing change resistance and reinforcement. Robust succession planning and change management will be required for STEP to continue moving forward in a significant way without losing the momentum it has built since its inception.
2. **Relationships and Trust*** - STEP CDC has excelled in developing strong relationships and trust with residents and key stakeholders in the community and beyond. Most of these relationships currently rely on Joe and Marvin's stewardship. It is important to transition stewardship of key relationships to other staff and board members. Joe and Marvin will be transitioning out in the next 1 to 3 years, and there is an opportunity to broaden relationships with new players at STEP and stakeholders.

3. **Nurture current and future leaders on the board** - STEP CDC has attracted several talented and diverse board members. With some major transitions in the next couple of years, STEP needs to continue to develop and nurture current and new board members and management staff. STEP should continue to attract younger leaders and provide them with board training and in some cases mentoring. There are a number of good board training and decision tools.

B. Financial and Operational

1. **Organizational structure plan*** - STEP has already completed several housing initiatives and has a few housing projects in the pipeline. It has been challenging to develop organizational and administrative systems while all the projects are moving forward. STEP needs to devote more resources to organizational processes and systems in the next 12 to 18 months. Specifically, STEP needs to refine and operationalize criteria for making decisions. Aligning the organization is especially critical as it goes through a leadership transition in the next 12 months.
2. **Funding balance and strategy*** - Currently, STEP is largely dependent on Stanislaus County Public Funding Sources as its primary funding source. STEP has limited operational capital to fund its general operations, which is consistent with other emerging CDCs. As the organization grows and assets increase, it will be important for STEP to diversify funding sources and generate sufficient returns on capital to fund its operations. STEP CDC can learn from the experience of other CDCs in California through support from CCEDA. STEP's quarterly convening of CRA officers is a promising development that could lead to more financial resources for STEP and other community development initiatives in Stanislaus County.
3. **New facility** - STEP has benefited from its incubation by City Ministry Network in terms of staff, programs, and space. STEP has outgrown its current facility and will need to relocate its headquarters to a building which can better accommodate its current and future needs. There are a growing number of CDCs that own their building either through renovation or new construction. STEP will benefit from having an independent location which serves as a meeting place for residents, clients, funders, and partners, plus meeting room space for training and consultation.

C. Programmatic

1. **Core Competencies*** - Bob Zdenek and Dee Walsh's book, *Navigating Community Development* identifies core competencies for CDC leadership and strategic partnerships. STEP needs to be strategic in terms of which core competencies it develops. At the retreat, the board members talked about

collaboration, financial structuring, development process, and maintaining community relationships. . Partnerships are an excellent way to acquire the competencies needed for community development projects. STEP has expressed interest in doing a future exercise with the consultant team to identify core competencies for the organization.

2. **Housing/Subject Matter Expertise-** Affordable Housing should continue to be the major priority for STEP in the next two to three years focused on building its subject matter expertise. Housing is complicated and there are a few strategies for STEP to implement. Housing subject matter expertise needs to blend with executive leadership so that effective strategic decisions can be made based on the best information. Additionally, a housing strategy is a good way for an organization to build assets and the fund balance.
3. **Small business services-** STEP CDC can explore becoming a full-service business development organization in the next two to three years including becoming a micro lender or partnering with an existing micro lending source. Technical assistance and training are other critical elements. The Association of Enterprise Opportunities (AEO) is the trade association of micro lenders and could be a good resource for STEP CDC. Another related opportunity would be developing a business incubator and/or mercado to house, support, and grow businesses.
4. **Seek measurable progress in creating housing.** STEP can learn from other large affordable housing developers which data systems enable the organization to capture the data necessary for managing projects.
5. **Convenor role-** STEP has developed considerable expertise and savvy in serving as a convenor. In this environment, an effective convenor is a critical competency for community development bringing together diverse programs, perspectives, organizations, and individuals. Along with affordable housing and business development, convening and connecting will enable STEP to have a broader impact within Stanislaus County. STEP should continue to expand its convenor role.

Three additional recommendations were suggested by board members during the April 21 Retreat. In our view, they would be complementary to or supportive of the recommendations above:

- **Create and expand an educational component which aligns with STEP's mission.**
- **Compile stories to allow STEP to measure hope and security.** STEP can tell stories of individual successes and community wide impact that demonstrate the effectiveness and potential of a CDC. Stories will introduce STEP CDC to a broader community.

- **Generate a Board Matrix.** Several board members expressed interest in having STEP develop a board matrix showing demographic characteristics, expertise, employment, skills, and other volunteer initiatives. The board matrix is a helpful decision-making tool for recruiting and retaining board members.

Timeline for Strategic Plan

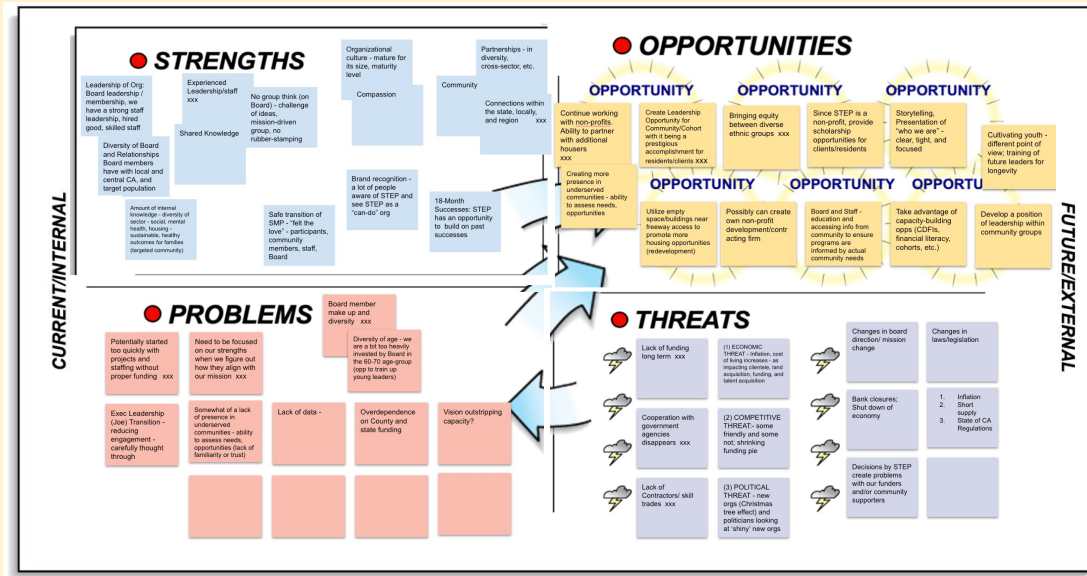
| | |
|---|---------------------------|
| STEP Board and Staff adopt a strategic plan with changes | April 21, 2023 |
| STEP Board establishes a strategic planning committee for yearly review | April 21, 2023 |
| STEP Board agrees to a succession planning strategy | May 2023 |
| STEP Board and Staff release written plan to community and stakeholders | June 2023 |
| STEP develops criteria for succession planning and search committee | June 2023 |
| Succession planning recommendations implemented | July – October 2023 |
| Search Committee begins to search and process | September – November 2023 |
| Review of candidates | November – December 2023 |
| Board selects new candidates | January 2024 |
| New CEO starts | March 2024 |
| Onboarding with past CEO and new CEO | March – April 2024 |
| Strategic plan review and suggested updates | April 2024 |
| Strategic plan review and suggested updates | April 2025 |
| Strategic plan review and suggested update | April 2026 |
| Strategic plan review and suggested updates | April 2027 |
| New plan | |



Appendix A: SPOT

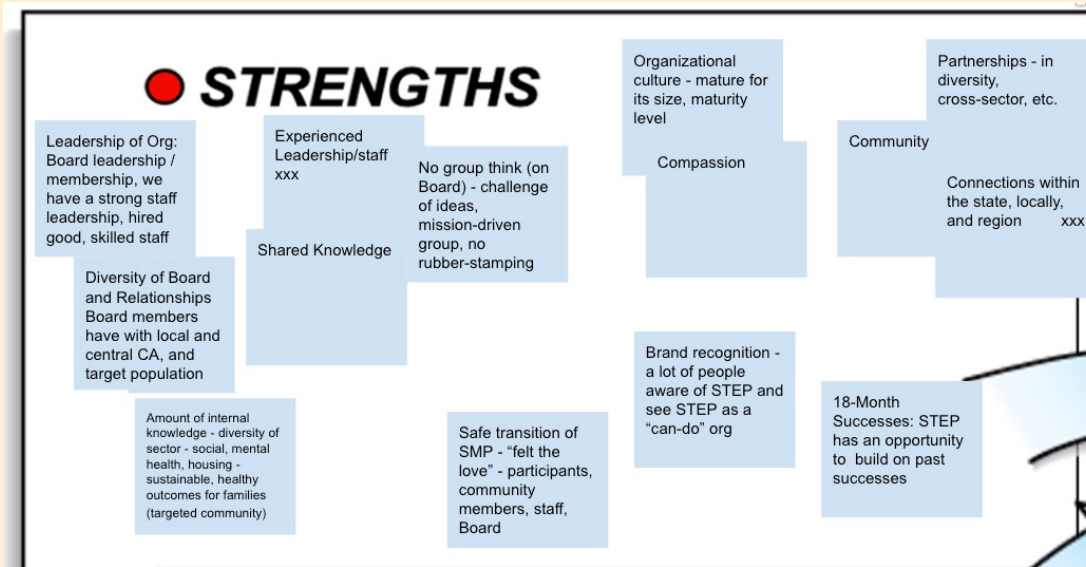
SPOT Insights

Consolidated SPOT



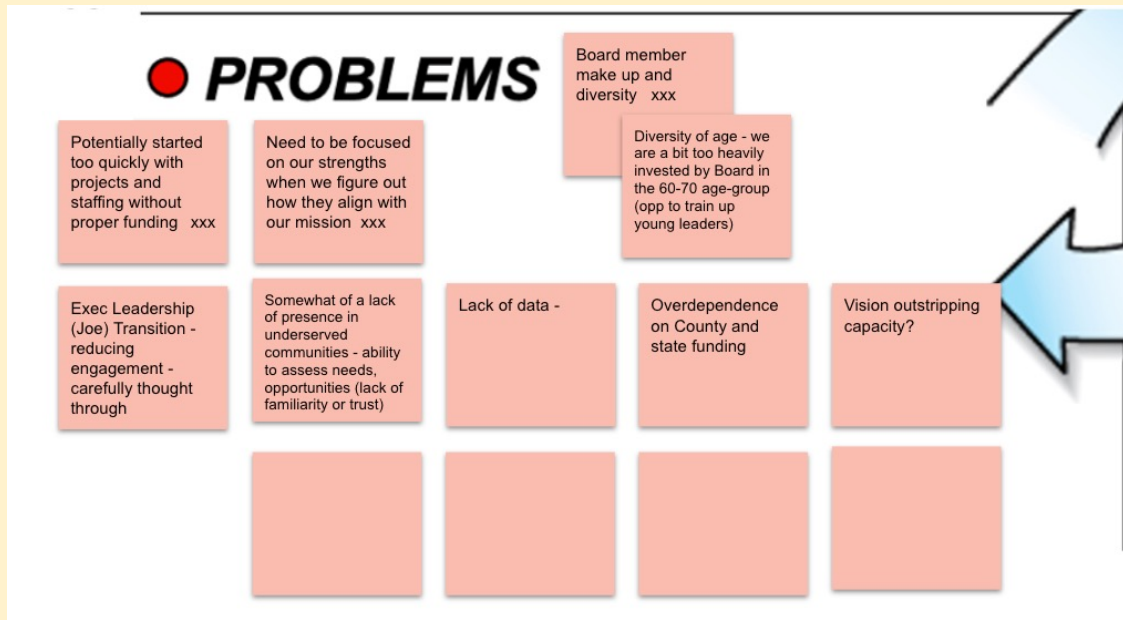
SPOT Insights

Consolidated SPOT



SPOT Insights

Consolidated SPOT



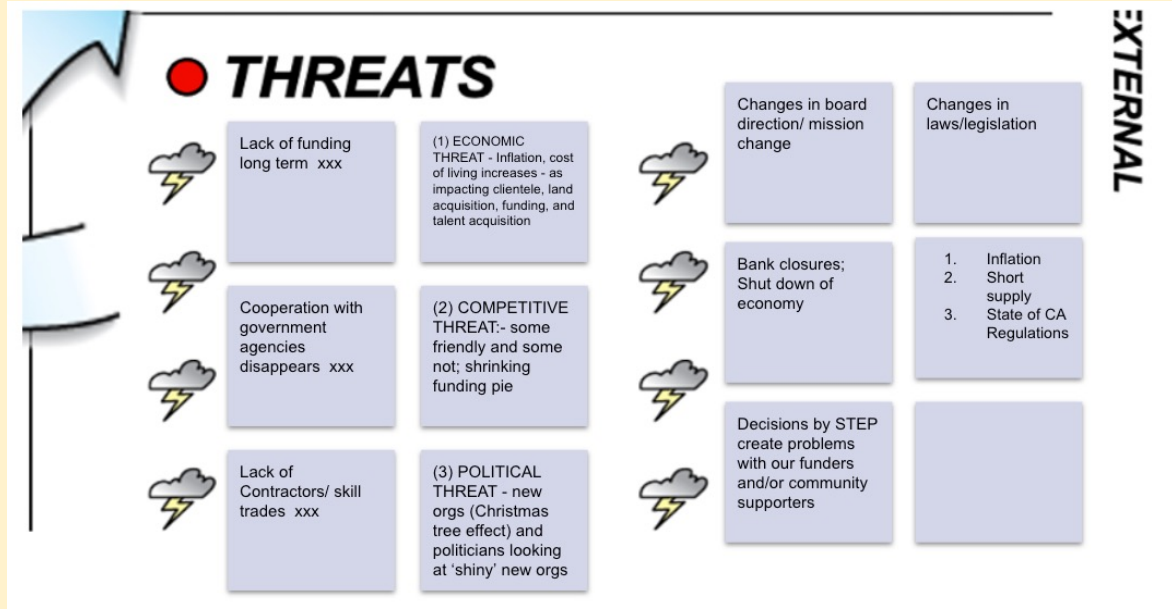
SPOT Insights

Consolidated SPOT

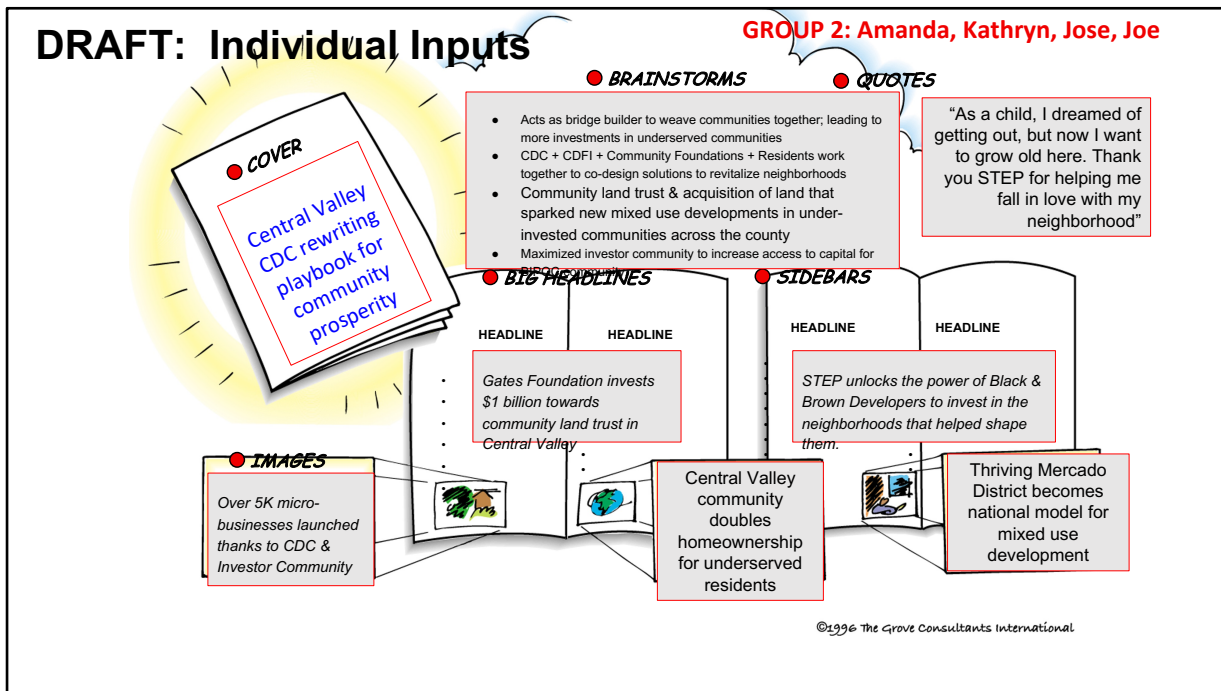
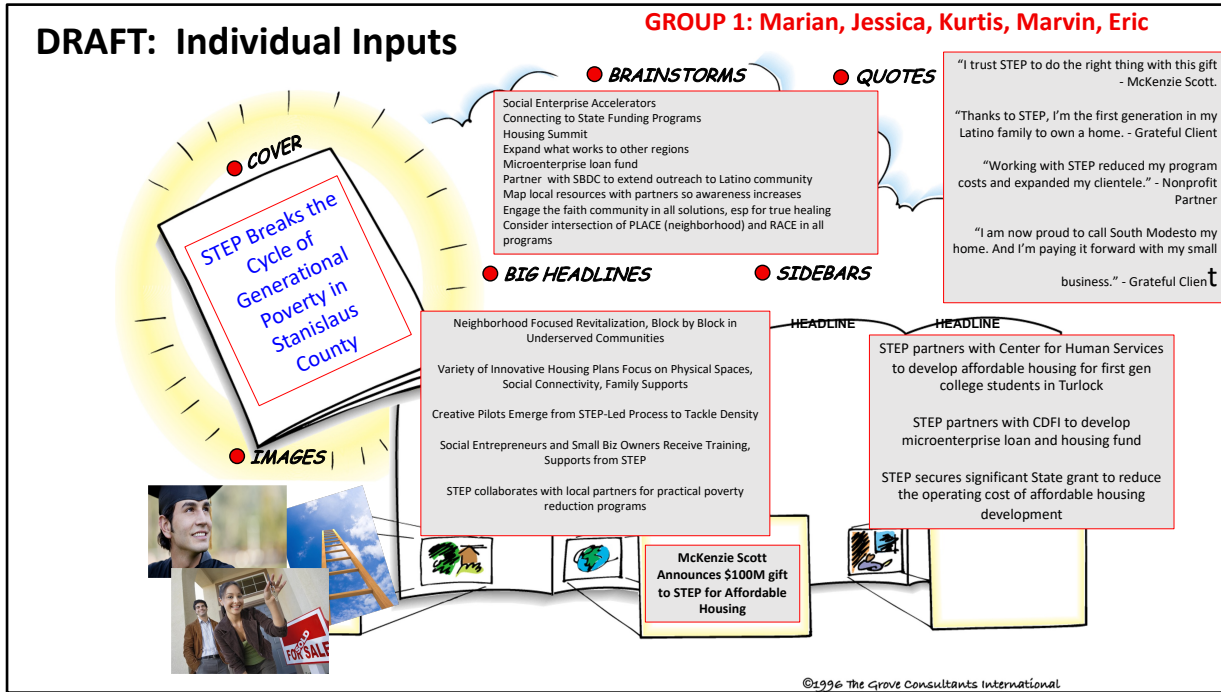


SPOT Insights

Consolidated SPOT



Appendix B: Cover Story

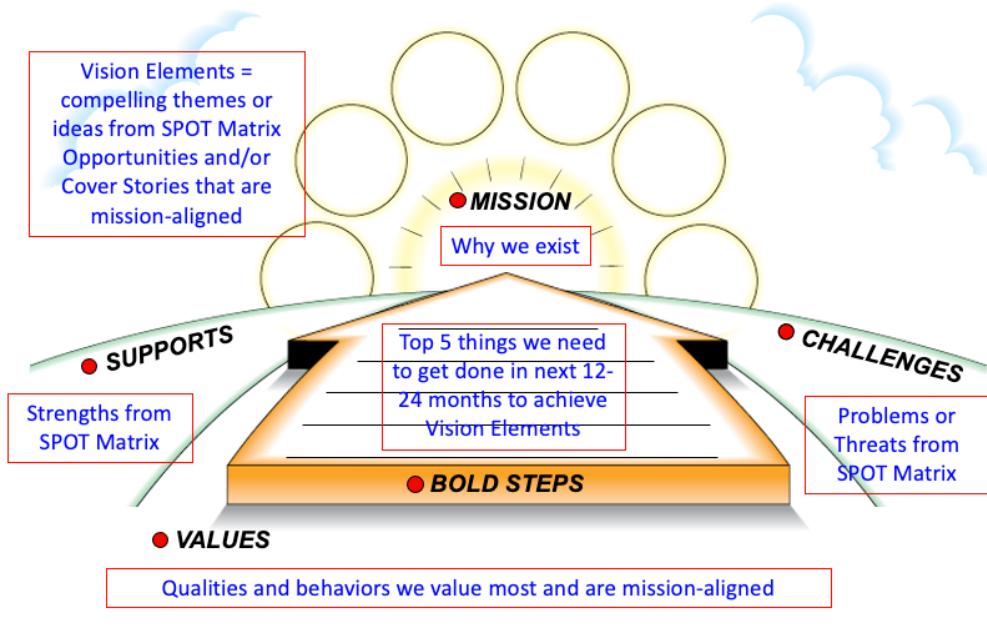


Appendix C: 2028 Vision Elements

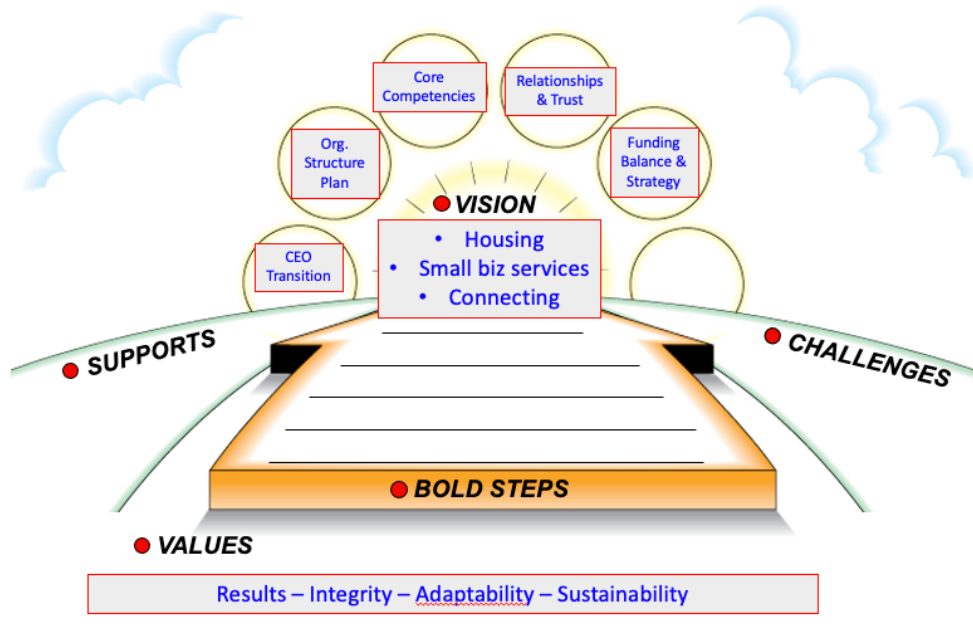
| Housing | Small Business Services | Connecting |
|--|---|---|
| <p>Goals:</p> <ol style="list-style-type: none"> 1. Getting people into housing 2. Allowing people to build wealth through affordable homeownership <p>Through:</p> <ul style="list-style-type: none"> • supportive housing • workforce rental housing (ie tiny homes) • homeownership • <p>Measured by:</p> <ul style="list-style-type: none"> • # housing projects completed • # people housed • # new beds we were involved in creating • Rent • # new houses • # families we got into homeownership • Volume of investment \$ for affordable housing/housing development attracted to the community as a result of STEP partnerships • Link between housing, equity and health outcomes (social determinants of health) | <p>Goal:</p> <p>Growth in small businesses owned by business owners of color, thanks to STEP financial and programmatic supports.</p> <p>Through:</p> <ul style="list-style-type: none"> • financial literacy/planning • new business creation • new job creation • <p>Measured by:</p> <ul style="list-style-type: none"> • # existing businesses which have grown as result of STEP programs • # new businesses launched • # new workers hired due to growth of existing small businesses or new businesses • Volume of lending \$ small businesses attracted thanks to STEP connections/support | <p>Goal:</p> <p>Connect individuals to financial programs at STEP and to other support programs.</p> <p>Through:</p> <ul style="list-style-type: none"> • loans <p>Measured by:</p> <ul style="list-style-type: none"> • # of referrals to financial programs made • # of people participating in STEP programs • # of financial tools accessed and by whom • # nonprofit and public agency partnerships STEP is engaged with. • Amount of new resources brought into county through STEP advocacy. • # people were connected to affordable home loans • \$ we attracted to the county |

Appendix D: Five Bold Steps

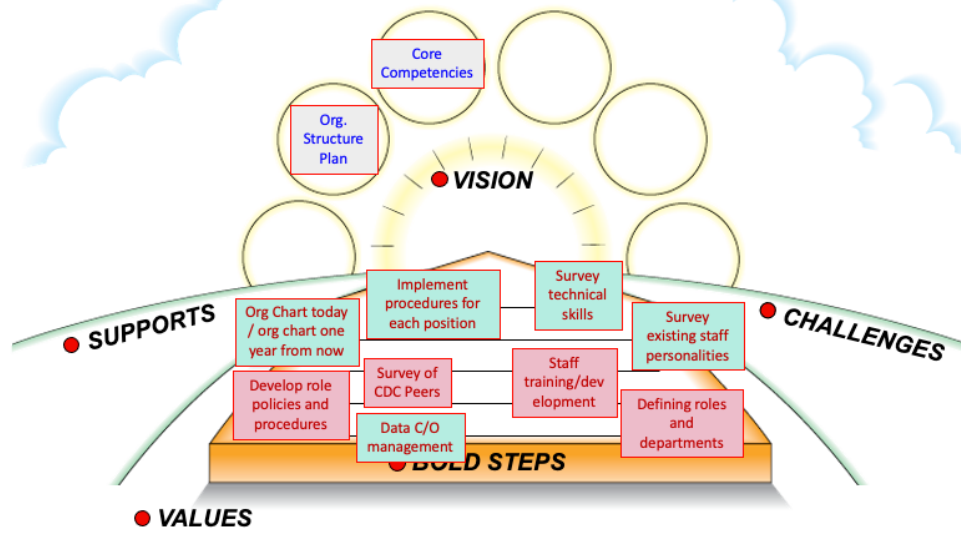
Five Bold Steps



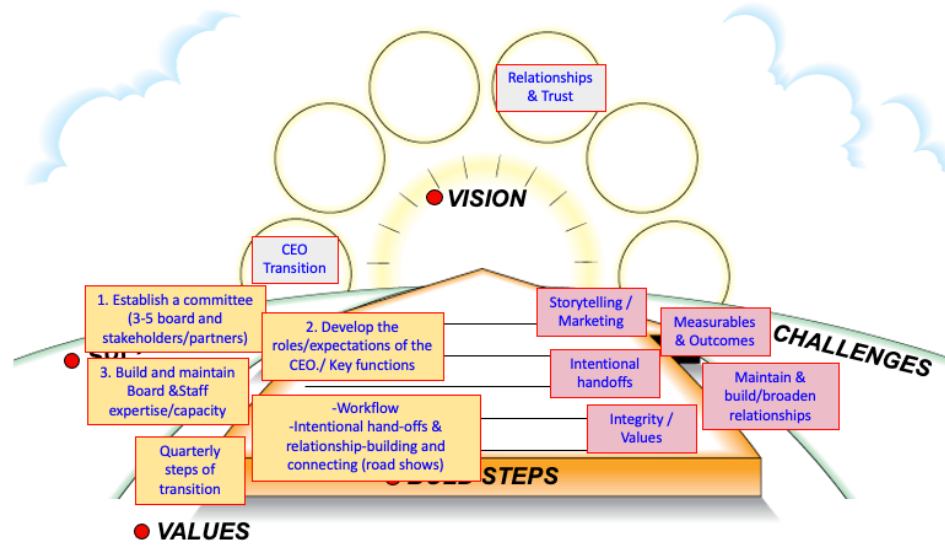
Five Bold Steps



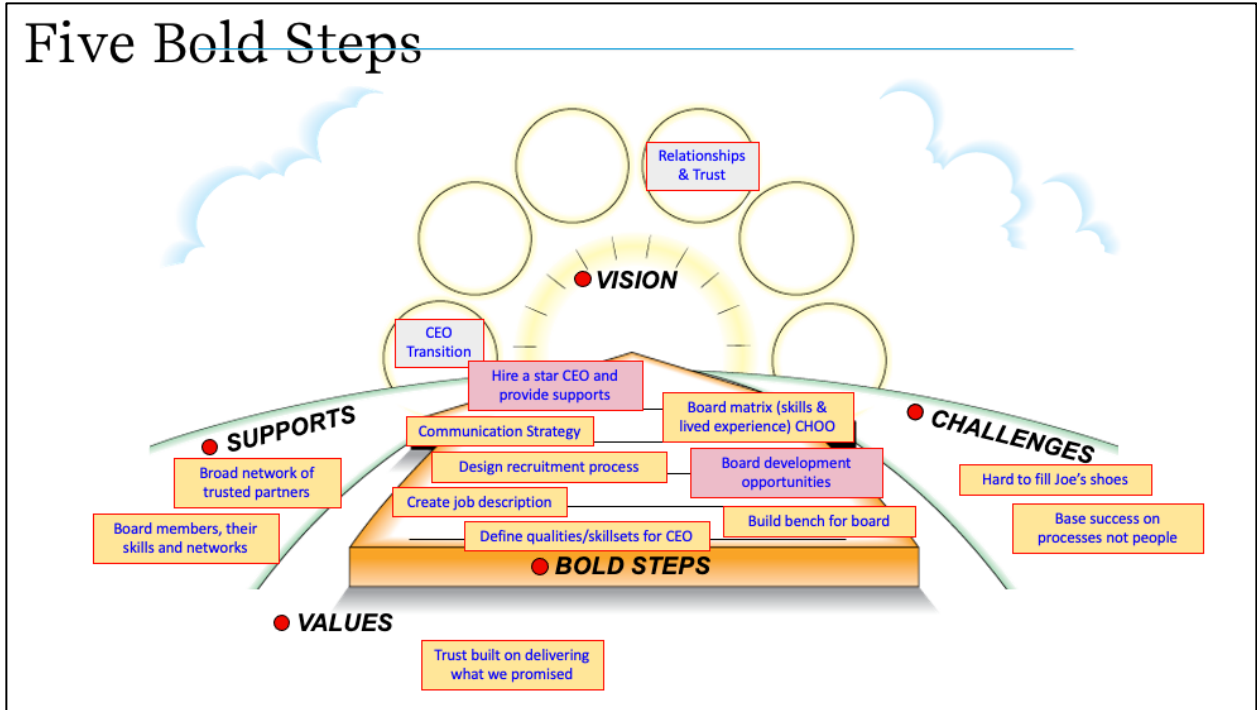
Five Bold Steps



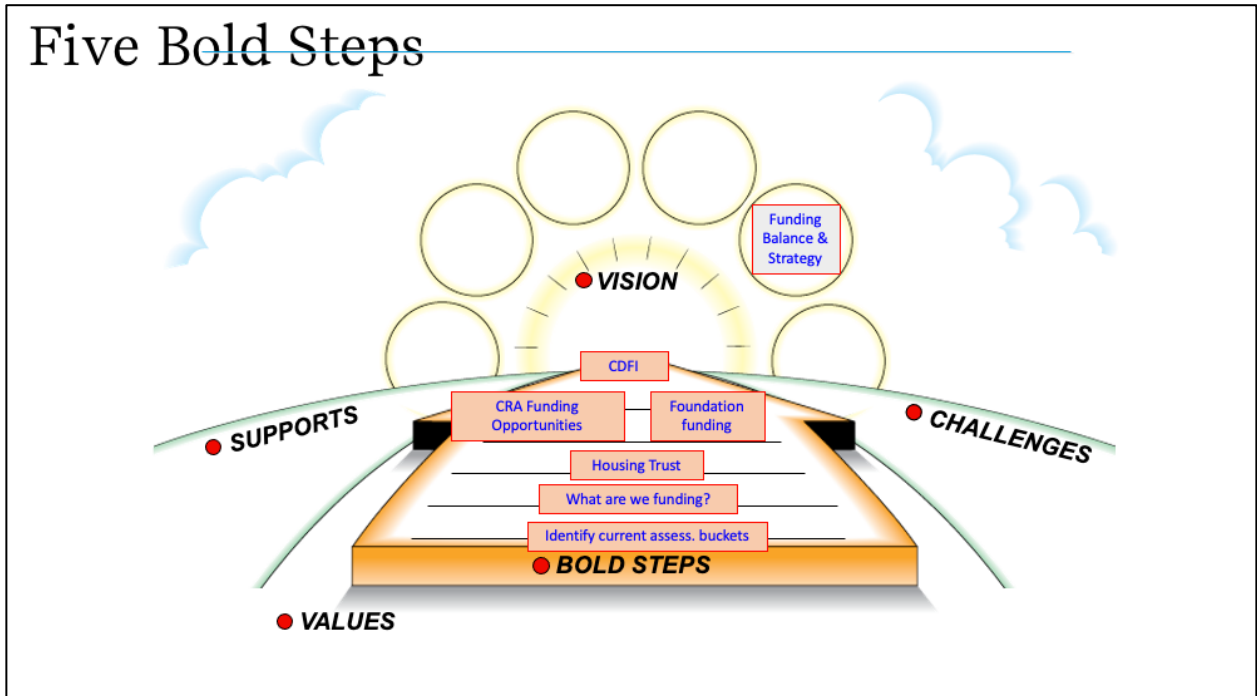
Five Bold Steps



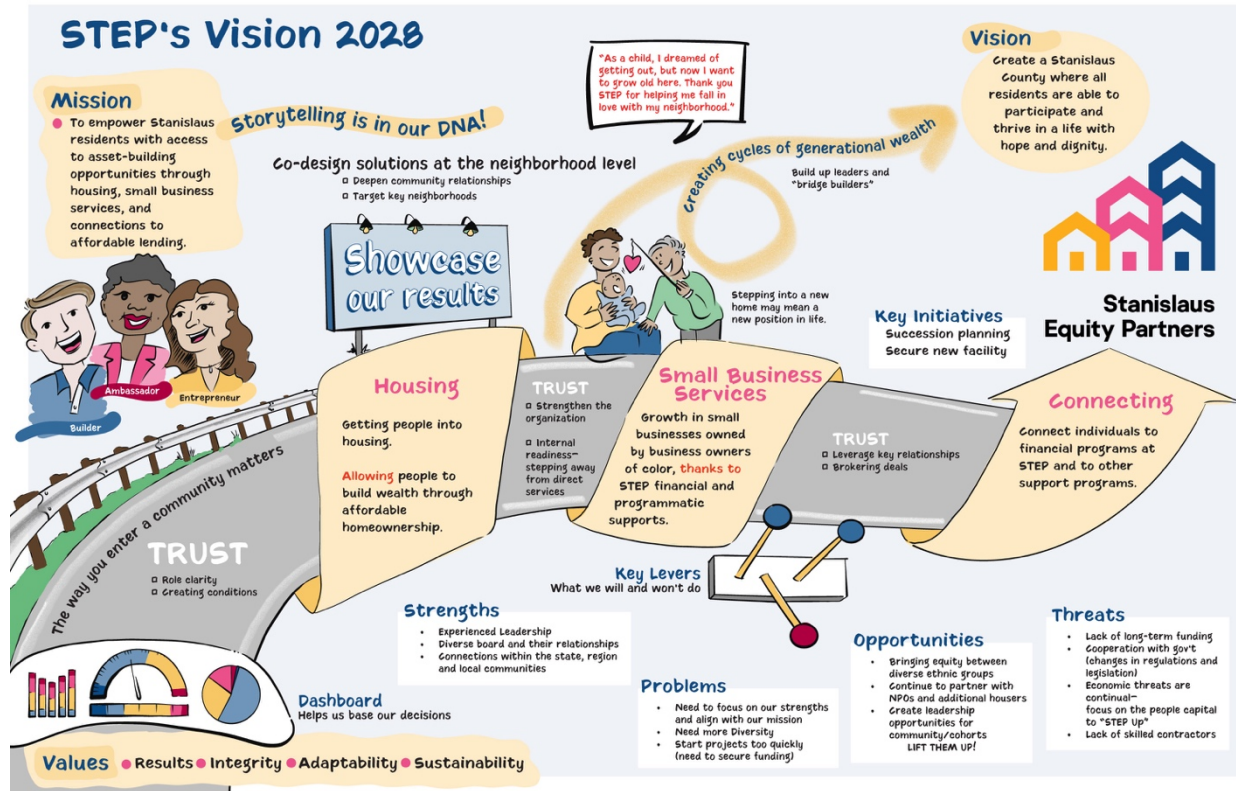
Five Bold Steps



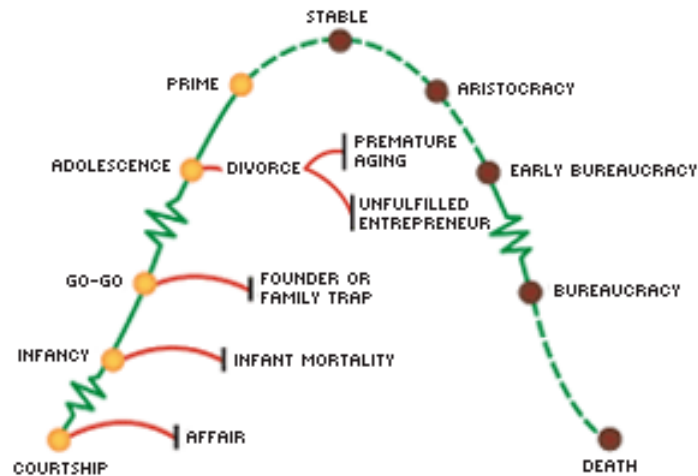
Five Bold Steps



Appendix E: 2028 Vision Map



Appendix F: Ichak Adizes Organizational Life Cycle Model



Ichak Adizes popularized the theory that organizations, like all living organisms, have a lifecycle and undergo very predictable and repetitive patterns of behavior as they grow and develop. At each new stage of development an organization is faced with a unique set of challenges. How well or poorly a leadership team addresses these challenges and leads a healthy transition from one stage to the next, has a significant impact on the success or failure of their organization.

Leading an organization through lifecycle transitions is not easy, or obvious. The same methods that produce success in one stage can create failure in the next. Fundamental changes in leadership and process are required to balance the amount of control and flexibility needed for each stage. Leaders who fail to understand what is needed (and not needed) can inhibit the development of their companies or plunge them into premature aging.

Ironically, the challenges that every organization must overcome at each stage of development first manifest themselves as problems that arise from the growth and from external changes in markets, competitors, technology and the general business and political environment. This simple, unavoidable reality leads to the following five important insights about the nature of problems in organizations. The “age” of an organization in terms of its lifecycle is not related to its chronological age, the number of staff, or the size of its assets. Lifecycle age is defined by the interrelationship between flexibility and control.

There is a fountain of youth for organizations called Prime. An organization that is in Prime has achieved a balance between control and flexibility. A Prime organization knows what it is doing, where it is going, and how it will get there. It also enjoys both high growth and high profitability. Once an organization reaches Prime, leadership must work to sustain that position.

**Adapted from Adizes Institute Worldwide*

Appendix G: Organizational Assessment Interview Questions

| ORGANIZATION OVERALL PERFORMANCE | |
|----------------------------------|---------------------------|
| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
| • | • |

| VISION |
|---|
| WHAT IS THE CURRENT VISION FOR THE ORGANIZATION? |
| • |
| WHAT EVIDENCE DO YOU SEE THAT THE CURRENT VISION IS WELL UNDERSTOOD BY ALL STAFF? |
| • |

| STRATEGIES |
|---|
| WHAT ARE CURRENT KEY STRATEGIES OR INITIATIVES? |
| • |
| WHAT PROGRESS DO YOU SEE HAPPENING WITH THESE STRATEGIES? |
| • |
| WHAT GETS IN THE WAY OF THE ORGANIZATION EXECUTING ON ITS STRATEGIES? |
| • |

| VALUES & CULTURE | |
|--|---|
| WHAT ARE THIS ORGANIZATION'S CORE VALUES? | |
| • | |
| HOW DOES LEADERSHIP MODEL THESE VALUES? | |
| • | |
| HOW ARE IMPORTANT DECISIONS USUALLY MADE HERE? | |
| • | |
| WHAT ASPECTS OF THE CURRENT CULTURE HELP THE ORGANIZATION ACHIEVE ITS VISION/STRATEGIES? | WHAT ASPECTS OF THE CULTURE MAY MAKE IT HARDER FOR THE ORGANIZATION TO ACHIEVE ITS VISION/STRATEGIES? |
| • | • |

FUNCTIONS

FUND DEVELOPMENT

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| • | • |

BUSINESS DEVELOPMENT

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| • | • |

FINANCE

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| • | • |

HOUSING

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| • | • |

HR

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| • | |

IT

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| | • |

FACILITIES

| WHAT IS WORKING WELL? | WHAT IS NOT WORKING WELL? |
|-----------------------|---------------------------|
| | • |

LEADERSHIP

HOW WOULD YOU DESCRIBE YOUR CEO'S STYLE OF LEADERSHIP (e.g., hierarchical, participatory)

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HOW DOES YOUR CEO USUALLY COMMUNICATE WITH STAFF?

•

IN WHAT WAYS DOES THEIR LEADERSHIP STYLE SUPPORT ORGANIZATION EFFECTIVENESS?

•

IN WHAT WAYS DOES THEIR LEADERSHIP STYLE HINDER ORGANIZATION EFFECTIVENESS?

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| • |
| TALENT |
| WHAT MINDSETS, SKILL SETS OR BEHAVIORS DO YOU VIEW AS CURRENT STRENGTHS WITHIN THE ORGANIZATION THAT IT SHOULD MAINTAIN FOR FUTURE SUCCESS? |
| • |
| WHAT MINDSETS, SKILL SETS OR BEHAVIORS DO YOU VIEW AS NEEDING TO BE FURTHER DEVELOPED WITHIN THE ORGANIZATION TO SUPPORT ITS FUTURE SUCCESS? |
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| • |
| WHAT % OF PEOPLE ON STAFF DO YOU THINK COULD BE READY FOR MORE RESPONSIBILITY NOW? WITHIN 1-2 YEARS? WITHIN 3-5 YEARS? |
| • |
| WHAT ARE THE BIGGEST ENABLERS OR CONSTRAINTS YOU SEE IN DEVELOPING OR RETAINING CURRENT TALENT? |
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| OTHER FEEDBACK |
| WHAT FACTORS CONTRIBUTE MOST TO YOUR PERSONAL SUCCESS IN THIS ORGANIZATION? |
| • |
| WHAT ADDITIONAL SUPPORT OR RESOURCES DO YOU WISH YOU HAD? |
| • |
| WHAT ADDITIONAL SUPPORT OR RESOURCES WOULD YOU WISH FOR YOUR TEAM? |
| • |
| WHAT RECOMMENDATIONS DO YOU HAVE TO ENHANCE THE OVERALL EFFECTIVENESS OF THE ORGANIZATION? |
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