

# Checking The Pulse Of Your Organization

A GUIDE TO CREATING  
RESILIENT ORGANIZATIONS



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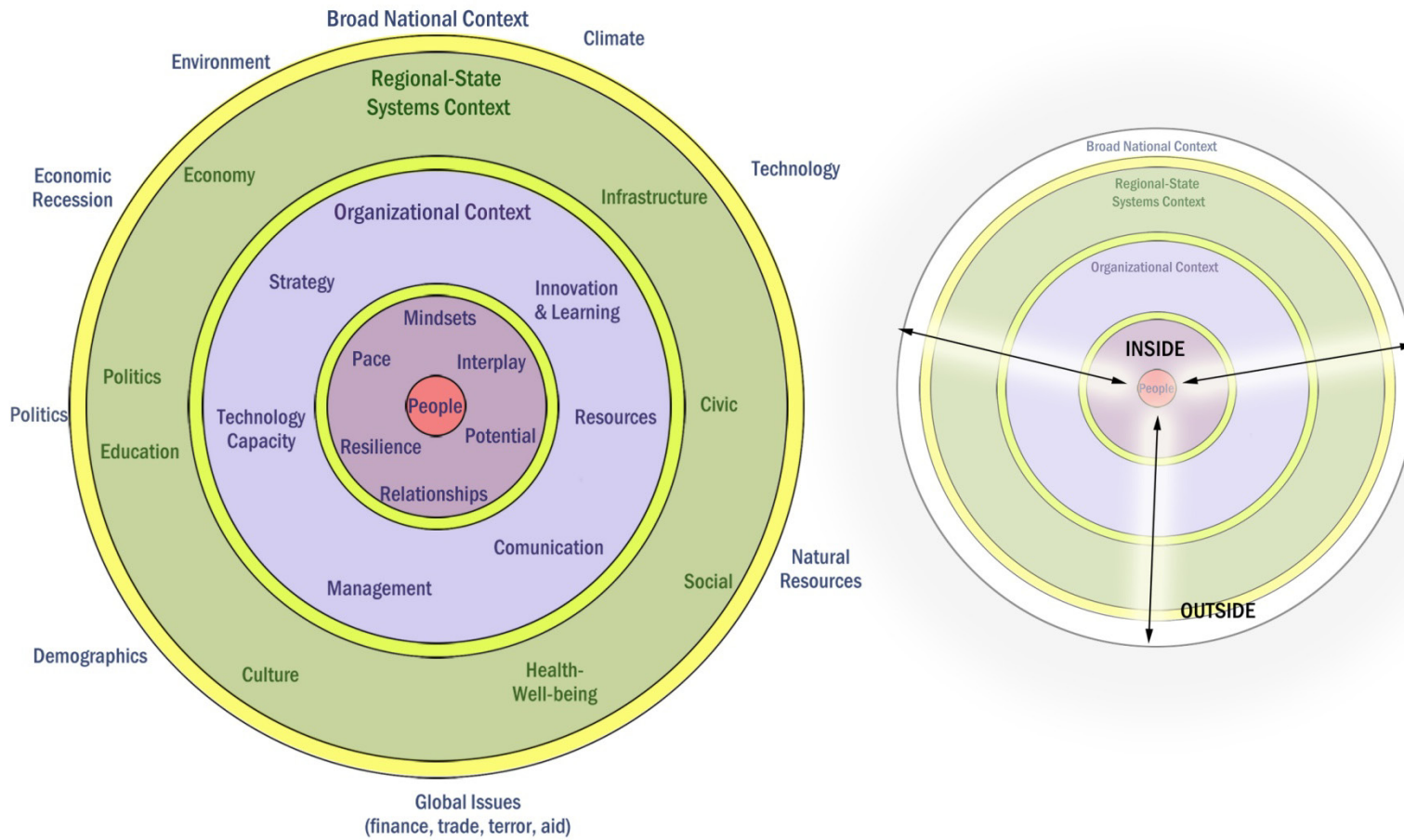
Developing a truly resilient organization—one capable of self-renewal through continuous innovation—is a difficult process. The purpose, passion, vision and unique value or services it contributes to the world must be clear and timely. Navigating the changing context of your market or ecosystem requires discipline, discernment, and some luck. We think there are 60 important questions that organizations can use to take their pulse and shape a path to resilience and health. Taking the pulse of your situation is a useful assessment for the organization’s key staff, board, and other trusted allies.

This simple guide provides a framework for leaders to gain insights about their organization and its relationship to the constantly changing environments in which they work. We developed a series of reflective questions in a set of tables that provide a quick snapshot of your organization’s key elements, the key potential consequences or challenges, implications, and level of urgency (you can rate these from extremely urgent –3 to less urgent–1). This tool is designed for social sector organizations, especially nonprofit groups and private foundations. Many of the questions will be relevant and can be easily adapted for public sector agencies and institutions.

We organized this assessment tool around four connected tiers. You can use an “outside-in” orientation to focus first on the broader national-global dynamics and their implications on your business environment. Each successive level focuses more closely on your regional context and operating environment by emphasizing the impact of external forces on your organization. As an alternative, you can use an “inside-out” process. Start with the People dimension and focus to clarify your vision and the heart and talent of the organization to shape a positive future given the likely external realities your organization could face in the coming decade.

Ultimately, your leadership team will have to synthesize the emerging insights from all four tiers and to organize an effective approach to developing an appropriate strategic response. Ken Hubbell and Associates (KHA) is a consulting network with over twenty years experience providing strategy and planning solutions to the nonprofit sector. KHA excels at facilitating groups through synthesis and strategic thinking, so contact us to determine ways to develop more clarity and advantage and to reduce risks in an increasingly complex environment.

Here's a conceptual framework for this assessment guide. It combines both an outside and an inside look at your organization and its environment.



## The impacts of the national context

Obviously, we are all being affected by the broad, national context, where social, political, environmental, demographic, and technological forces are reacting to an increasingly global dimension involving ongoing wars, worries about pandemics and cyber-security, and the behavior and future of the global finance and planetary ecosystems. We map these as the outer ring of influential forces that are triggering changes in industries, communities, and organizations. When multiple forces interact they amplify the impact that might be possible from a single force. There are a number of good questions an organization might lift up to identify coming possibilities, tensions, or lingering uncertainties embedded in the broad national context—especially as the recession and recovery sputter beyond 2010.

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
What are the current drivers that will shape our decision-making in the next 6-12 months?			
What convergence of events could seriously disrupt our organization and business?			
Where are the biggest risks and unusual opportunities for us in this broad external context over the coming 3 years?			
How will our organization respond to the federal recovery and stimulus programs?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Is our core business still viable and sustainable and will our current strategies work in a constrained economy?			
How should we respond if market fluctuations, rising deficits, or budget cuts crimp investments in programs that affect our constituents?			
In a sluggish recovery, where will we secure new support or partners?			
Can we plan for any stability in cost and access for utilities and fuel?			
Will health care changes shift any elements of our operations in the next three-five years?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Will changes in weather systems or climate—or pending climate policy alter our plans?			
How will we be affected by continued political partisanship?			
What current practice do we need to release or discontinue because it has outlived its usefulness?			
What posture makes the most sense for us given the uncertainties on our own radar?			

## The impacts of changes in regional-state systems

Changes at the regional and state level are also reshaping our business environment. Like the larger, national issues, many of these shifts are slow-moving and longer-term impacts that may eventually alter the situation for our organizations and communities. We may not be able to anticipate how some changes will play out over the next 1-3 years. Other elements of this environment may be more volatile and must be considered as fairly urgent and turbulent for the immediate future.

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
What will the level of economic activity look and feel like for the next year in our region? Which industries or sectors will gain strength as the recovery unfolds and which will face continued hard times?			
How will the side effects of the national recession continue rippling out through state and municipal governments? How will we be affected?			
How would we take advantage of the downturn to shape the debate about the future of our field or our community/region?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Who is thinking ahead and promoting innovation in the civic arena? What is on the horizon that we should watch or challenge?			
What political challenges or changes are in store for the region?			
Are we engaged in the right conversations about the region's future workforce? Is the region promoting the most relevant learning and training system?			
How will the newest federal and state education frameworks affect our state, community? What might be different for our constituents or partners?			
Will any health issues or policies impact our organization or customers in the next year? How should we plan for this?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
What major public infrastructure efforts (highway, water, education, safety, etc.) are likely to affect us?			
Is the region's current social safety net effective and sustainable? Will this impact us in any way in the next few years?			
What blind spots could get in the way of our ability to perceive new opportunity?			

## The current pulse of our own organization and its ability to respond to external changes

It's fair to assume that every organization has been affected by the turbulent economic and social environment of the last two years. Some ideas and procedures are no longer successful or necessary, while in other cases, many groups are entering into new territory with different rules and expectations. These questions will help you assess the ability of your organization to respond to the external changes that were identified in the previous section.

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Do we still have a clear, coherent strategy—a set of congruent responses to the challenging environment—that set us apart and achieves impact?			
Does our business idea still work in the current environment or does it need refinement?			
Is our current strategic plan based on assumptions that have recently been turned upside down or is it flexible enough to provide direction?			
What are our basic approaches for understanding and anticipating the future? How well are these working?			
What are the biggest uncertainties the organization will face in the next three years?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
What have we learned recently about our impact and value to our core customers? Do we have an effective results framework in place?			
Has our view of our competition changed since the recession?			
Are our core goals and objectives still realistic? Are they in alignment with our mission and values?			
Is our current resource engine/model resilient enough to preserve our entire set of programs or products?			
How well does our organization manage its current work? Are we as effective as we intended?			
How has our workforce weathered the recession and How strong is our talent and energy?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
How effective and secure are our financial and data systems?			
How strong are our technological competencies? Are we investing in people so they can create new products, ideas with the most powerful and appropriate technology?			
What are the big frames and messages about our work that we communicate?			
What is the story that we feel most shines a positive light on our organization?			
What communication tools, competencies, or resources will we need in the next year to remain effective, relevant, and competitive?			
What additional facilities or infrastructure changes are on the horizon?			

An organization's ability to push through barriers or renew itself is heavily dependent on the belief systems and tacit assumptions of its people. Such **creative intangibles** are important assets in any resilient organization. As you continue checking the pulse of the organization, you could consider some additional questions.

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
What are the prevailing mindsets about the future inside our organization? In what ways has the recent recession shifted the tone, outlook, and expectations?			
How will we be affected by various social and technological networks like Twitter, Facebook, Linked In and others still in development?			
Do we have a strategic point of view about environmental issues and green methods or processes, and an assessment of their impact on our organization in the immediate future?			
How strongly connected and committed are the members of the leadership team, the board, the organization?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Is our whole organization, staff and board in sync and ready for the shifts that must be made?			
What have we learned about the pace of change in our business? What events might change or intensify this in the next year?			
What are our blind spots that may prevent a transformation in our thinking or in our work?			
Where is the untapped potential in the organization, and what will be required to unleash it?			
What is the conversation about our organization that we've never had that is now most critical for our future?			

## How well our people are navigating the current situation

At the center of every organization and institution are the people. The ways that people respond to relationships, challenges, uncertainties, and opportunities shapes the capacity for true resilience in nearly every organization. You can begin assessing the heartbeat of your organization with these questions. They should provide a clearer perspective of the current situation and identify areas that require fresh thinking and continued learning.

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Are we following through on current commitments to the work of change in our organization?			
Have individuals accepted personal responsibility for important outcomes?			
How would we describe our organizational culture?			
Are our core values alive in the organization? Are we walking our own talk?			
Is there a positive spirit in the organization? Where are we shining a light or casting a shadow as we lead?			

KEY QUESTIONS	SUMMARY OF RESPONSE	IMPLICATIONS	LEVEL OF URGENCY 3 =high 2= mod. 1= low
Is compassion and goodwill present in our work and across the organization?			
Can we identify a love for people being expressed in our work and actions? Are we nurturing the development of balanced, healthy people who can make sense of the world?			
How well are we stimulating innovation across our organization? How do we measure this?			
Do we have a clear eye on tomorrow's leaders on the staff and board? How effective is our leader development process?			
What fuels inspiration in our organization? How is this encouraged and incorporated into the work and culture?			
What is our dream for what is possible in the organization and in our community? Do we still have a common, shared vision that pulls people positively toward the future?			

## Organizing your findings and next steps

The assessment should have produced some challenges and questions for further strategic thinking. Your “Urgency Level” column should have a few issues that you rated at “3,” which provides an immediate priority list. **On the next page, we provide a simple Resilience Dashboard to record the FIVE most urgent issues or unfinished business you identified for the next 1-3 years.** We grouped the issues into three categories that reflect the essential sections of the graphic diagram on page 2.

<b>ORGANIZATIONAL STRATEGY CHALLENGES</b>	Includes broad national issues that shape the underlying strategic environment	Emerging issues and urgent challenges from pages 4-6
	Includes regional and state issues that amplify and reinforce the broader issues.	Emerging issues and urgent challenges from pages 7-9
<b>OPERATIONAL CAPACITY</b>	Includes issues about the technical and strategic features of the organization’s operational platform.	Emerging issues and urgent challenges from pages 10-12
	Includes issues about the creative intangibles that shape the organization’s attitude and innovative	Emerging issues and urgent challenges from pages 13-14
<b>TALENT AND CULTURAL ISSUES</b>	Includes people issues reflecting the spirit and heartbeat of the organization.	Emerging issues and urgent challenges from pages 15-16

The leaders work (paraphrasing Reinhold Niebuhr’s *Serenity Prayer*) is to recognize and save what needs saving, change what needs changing—and to have the wisdom to understand the difference and the courage and discipline to do what is required. We understand that this is easier to articulate than to live or implement. If you and other leaders of your organization need help facilitating the health and resilience plan for your organization, contact our firm. We’ll help you draw out your best solutions.

**ORGANIZATIONAL STRATEGY  
CHALLENGES**

**BROAD NATIONAL**

- 1.
- 2.
- 3.
- 4.
- 5.

**REGIONAL & STATE**

- 1.
- 2.
- 3.
- 4.
- 5.

**OPERATIONAL CAPACITY**

**BASIC STRATEGY &  
MANAGEMENT**

- 1.
- 2.
- 3.
- 4.
- 5.

**CREATIVE INTANGIBLES**

- 1.
- 2.
- 3.
- 4.
- 5.

**TALENT & CULTURE**

**HEART & SOUL**

- 1.
- 2.
- 3.
- 4.
- 5.

**RESILIENCE  
DASHBOARD**  
KEY CHALLENGES FOR LEADERSHIP

