

KEY ROLE DEPENDENCY ASSESSMENT FOR NONPROFITS

Could we function effectively if this person were unavailable for 6 to 8 weeks?

Choose one position and rate each statement: Yes, Partly, No, or Not Sure. The goal isn't to answer "Yes" to everything. It's to identify where your organization may be overly dependent on one individual and decide which vulnerabilities are worth addressing.

DO WE KNOW WHAT THIS PERSON ACTUALLY DOES?	YES	PARTLY	NO	NOT SURE
The employee's core responsibilities are clearly defined				
We know which responsibilities the employee performs that aren't reflected in their formal job description				
We can identify which responsibilities are essential and must continue during an extended absence				
We know which responsibilities could be reduced, delayed, delegated, or temporarily stopped				
Recurring deadlines, reports, meetings, approvals, and other obligations are documented				
Important projects and their current status can be understood by someone other than this employee				

IS CRITICAL KNOWLEDGE DOCUMENTED, OR DOES IT LIVE WITH ONE PERSON?	YES	PARTLY	NO	NOT SURE
Critical processes are documented well enough for another person to follow them				
Important files and essential information are stored in organizational systems and other employees know where to find them				
Important historical context is documented or known by more than one person				
Passwords, accounts, systems, and other critical access aren't dependent on one employee				
Someone other than this employee understands the most important aspects of how their work gets done				

DO WE HAVE REAL BACKUP COVERAGE?	YES	PARTLY	NO	NOT SURE
We have identified who would handle this employee's most important responsibilities during an absence				
Backup staff understand the responsibilities and have received enough training to perform essential tasks				
Staff have the access, information, and systems permissions they would need				
Coverage isn't dependent on simply adding an entire second job to an already overloaded employee				
We have considered whether responsibilities could be divided among several people rather than transferred to one person				
We know where temporary, contractor, or outside support might be needed				
At least some backup responsibilities provide useful development opportunities for other employees				

IS DECISION-MAKING AUTHORITY TOO CONCENTRATED?	YES	PARTLY	NO	NOT SURE
We know which decisions this employee normally makes				
Someone else has clearly defined authority to make time-sensitive decisions during their absence				
Staff know when they can make decisions independently and when something needs to be escalated				
Important approvals wouldn't stall simply because this person is unavailable				
Decision-making authority is documented rather than dependent on informal norms				
Employees have enough context and authority to handle appropriate issues without contacting the absent employee				

ARE IMPORTANT RELATIONSHIPS DEPENDENT ON THIS PERSON?	YES	PARTLY	NO	NOT SURE
More than one person has relationships with our most important stakeholders				
Key contacts and relevant relationship information are accessible to others				
Another employee could communicate with important stakeholders during an extended absence				
Stakeholders would know whom to contact while this person is away				
Important commitments or expectations are known by more staff than just this employee				

WHAT WOULD THIS PERSON'S ABSENCE REVEAL ABOUT HOW THE ROLE IS STRUCTURED?	YES	PARTLY	NO	NOT SURE
The role has a reasonable and sustainable scope				
Responsibilities that have accumulated over time still logically belong in the position				
Work is distributed appropriately across the team				
We aren't relying on this employee to routinely compensate for staffing, systems, or process problems elsewhere in the organization				
Other employees understand where this person's responsibilities begin and end				
Essential work doesn't depend on excessive hours or constant availability from this employee				
We could temporarily stop some work without creating significant organizational harm				