Organizational Growth Readiness Snapshot

Before you expand: identify capacity and control gaps

Expansion increases operational complexity. Use this snapshot before adding locations, programs, contracts, or staff to test whether your current systems can support additional demand.

How to use: Mark each statement 0 = Not in place, 1 = Partially in place, 2 = In place and evidenced. Mark N/A only when genuinely outside your organization's scope; exclude N/A from the denominator. For each score of 0 or 1, record the missing evidence or corrective action.

Organization: _____ Review date: _____ Reviewer: _____

Leadership & direction

01. Leadership has approved a written expansion rationale, success measures, and decision owner.	0 / 1 / 2 / N/A
02. The organization has identified material expansion risks and assigned mitigation owners.	0 / 1 / 2 / N/A
03. Governance or leadership reviews performance and growth decisions on a documented schedule.	0 / 1 / 2 / N/A

Financial & delivery capacity

04. Cash-flow projections include startup costs, delayed payments, and a realistic downside scenario.	0 / 1 / 2 / N/A
05. Staffing and service-delivery forecasts account for workload, coverage, and training time.	0 / 1 / 2 / N/A
06. Critical processes are documented so services can continue if key personnel are absent.	0 / 1 / 2 / N/A

Systems, controls & external readiness

07. Current licenses, insurance, contracts, and eligibility conditions have been checked for the proposed expansion.	0 / 1 / 2 / N/A
08. Data and reporting systems can produce accurate, timely information for additional programs or sites.	0 / 1 / 2 / N/A
09. Participant/client feedback and service quality are reviewed before scaling.	0 / 1 / 2 / N/A
10. Expansion has stage gates: pilot, review, corrective action, and approval before full rollout.	0 / 1 / 2 / N/A

Scoring & interpretation

Score: ____ points earned / (2 x ____ applicable statements) = ____%. Suggested triage only: 85-100% generally established controls; 65-84% targeted gaps; below 65% significant preparation needs. These cutoffs are planning conventions, not validated thresholds. A single critical legal, safety, privacy, or financial failure overrides the percentage.

Priority warning signs: Unfunded commitments; undocumented ownership; unverified contractual eligibility; expansion dependent on one employee.

Immediate action plan

Highest-risk gap and supporting evidence: _____

Owner and corrective action: _____

Target completion date: _____ Verification method: _____

Evidence cross-reference

GAO, Standards for Internal Control in the Federal Government (2025 Green Book), framework for risk assessment, controls and monitoring: https://www.gao.gov/greenbook

OSHA, Management Leadership: resources, defined roles and measurable objectives (analogous management practice): https://www.osha.gov/safety-management/management-leadership

Important: This is an original, evidence-informed preview checklist, not a licensed or psychometrically validated assessment. Applicable requirements depend on your sector, funding, contracts, and jurisdiction. A completed checklist does not establish compliance or guarantee audit outcomes.

REQUEST THE EXPANDED ASSESSMENT

To request the expanded organizational growth readiness snapshot toolkit, choose one pathway: subscribe to the Thrive Forward Solutions newsletter; or follow Thrive Forward Solutions on three different social media platforms; or leave three separate comments on our social posts using the keyword SNAPSHOT. Then contact info@tfs-tin.org with the keyword and your preferred delivery email.

Full version preview: extended item bank, evidence register, scoring worksheet, corrective-action tracker, and management review template. Access and fulfillment details are subject to confirmation by TFS.