

FIELD GUIDE TOOL #18

The Sustainability Audit

Chapter 18: Ownership Endurance: Protecting the Energy

DATE _____ COMPLETED BY _____

SITUATION _____

Use this tool to assess the endurance of ownership in your current team or organization. Complete it quarterly. The signals of erosion are easier to address early than late.

When to use it. Best used quarterly and whenever the team's initiative or decision quality seems to be declining.

Part A: Capacity Assessment

For each team member, assess current scope against available capacity.

Team member	Active responsibilities (list all)	Capacity assessment (Sustainable / At limit / Over limit)
1.		
2.		
3.		
4.		
5.		
6.		

Part B: The Closure Inventory

List items that have been completed, embedded, or resolved but have not yet been explicitly named as finished.

Item	Closure action needed
1.	
2.	
3.	
4.	
5.	
What specifically will you say to declare each of these finished?	

Part C: The Erosion Signals

Based on what you have observed in the last 60 days, rate each signal on a scale of 1 to 5: 1 = Not present, 2 = Rare / faint signal, 3 = Occasionally observed, 4 = Frequently observed, 5 = Clearly present.

Erosion signal	Rating (1–5) and evidence
Decision quality: more hedging, qualification, and requests for confirmation than six months ago	
One-on-one quality: more backward-looking updates, less forward-looking ownership thinking	
Initiative frequency: fewer unprompted proposals, ideas, and self-directed improvements	
Energy quality: visible engagement declining even as performance metrics hold	
Overall erosion assessment (Low / Medium / High):	

Part D: The Endurance Plan

Based on your assessment, identify the structural actions required to restore or sustain ownership endurance.

Discipline	Specific action needed and owner
Priority limitation: What needs to come off the plate before anything new is added?	
Visible closure: What needs to be explicitly named as finished?	
Reinforce before reinvent: Is any current initiative ready to be declared standard practice?	
Cadence over urgency: Which meetings or rhythms need to be restored or restructured?	
Leadership restraint: Where are you intervening when you should be supporting?	

This is the final field guide tool. Before closing the book, confirm:

- ☐ You have assessed capacity honestly for each team member.
- ☐ You have named at least three things that can be explicitly closed.
- ☐ You have rated the four erosion signals against recent observation.
- ☐ You have identified at least one structural action for each of the five endurance disciplines.
- ☐ You have a committed date for the next sustainability audit.