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| --- | --- | --- |
|  | **Current Status** | **Work Needed** |
| **Mission, Vision, Values** Mission, Vision and Values statements help define the purpose and direction of a successful organization. These statements intentionally affect strategic decisions. |  |  |
| **Staff: Leadership and Team** The employees of the organization, including staff leader(s) and the policies/procedures that define staff responsibilities, performance, and terms of employment. May also include consultants, contractors, and volunteers who support staff or extend the capacity of staff. |  |  |
| **Board/Governance** The organization’s management and/or board structure. How the organization is managed and governed, which includes the specific responsibilities defined both by law and by the culture/structure of the organization. |  |  |
| **Community Role/Partnerships** The relationship that the organization has with their external stakeholders, including other nonprofit organizations, the local community, elected officials, etc. |  |  |
| **Programs** The service and/or policy programs the organization offers to the community. |  |  |
| **Impact/Evaluation** Methods by which an organization assesses, evaluates, or measures their mission impact (i.e. the social change they are achieving through their work). Evaluation helps guide future planning, allows the organization to continuously improve their work, and proves to others that the work is valuable. |  |  |
| **Marketing and Communication** The marketing plans and strategies that help the organization gain visibility. Also refers to how the organization communicates with the community at large. |  |  |
| **Financial Management**  The management of funds and cultivation of best financial practices so as to maximize the value and growth of actual resources. |  |  |
| **Fundraising/Resource Development** Where and how an organization funds itself, including the processes by which an organization generates funds and sustains diverse financial and material resources. |  |  |
| **Systems: Administrative, Technology and Infrastructure** The internal systems used by the organization. These systems include, but are not limited to, what technology systems are used, what internal communication systems are in place, what data collection tools are used, and what systems are developed to ensure that the administrative functions of the organization run smoothly. |  |  |
| **Planning** How the organization plans for its future, including development and integration of the organization’s mission and vision. This also includes planning both for short and long-term sustainability. |  |  |

Adapted from *Smart Growth: A Life-Stage Model for Social Change Philanthropy*, Women’s Funding Network, San Francisco, California: 2004.