Organizational Check-up

This assessment is intended to be repeated yearly as part of an annual strategic planning cycle.

The assessment can be taken by the staff and/or board.

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I. General Information

Your Name	
Your Role in the Organization	
Date	

II. Ratings

Category		1 = Absolutely Not 2 = No 3 = Not Really 4 = Sort Of 5 = Yes 6 = Absolutely Yes! N/A = Not Applicable, Don't Know, or Doesn't Exist Circle the Rating						
Mission and Vision Statements	**1. Mission Statement:** We have an up-to-date mission statement that is brief, well-communicated, and used as a filter for key decisions.	1	2	3	4	5	6	N/A
	2. Vision Statement: We have an up-to-date vision statement that is brief, well-communicated, and used as a filter for key decisions.	1	2	3	4	5	6	N/A
Programs / Services	**3. Programs / Services:** We have a focused, effective, and well-organized program(s) / service(s).	1	2	3	4	5	6	N/A
	4. Key Metrics: We have a small set of key metrics that we use to measure the success of our program(s) / service(s).	1	2	3	4	5	6	N/A
People	**5. Board of Directors:** Our board of directors governs the organization effectively.	1	2	3	4	5	6	N/A
	6. Staff: Our staff has the skills and capacity needed to run the organization effectively.	1	2	3	4	5	6	N/A
	7. Volunteers: We have a sufficient number of volunteers that are effectively trained and engaged.	1	2	3	4	5	6	N/A
Fund Development	**8. Plan**: We have an up-to-date fund development plan.	1	2	3	4	5	6	N/A
	9. Process: We regularly review, revise and measure progress on our fund development plan.	1	2	3	4	5	6	N/A
Marketing	**10. Plan**: We have an up-to-date marketing plan.	1	2	3	4	5	6	N/A
	11. Process: We regularly review, revise and measure progress on our marketing plan.	1	2	3	4	5	6	N/A
Operations	**12. Financial Management**: We implement a regular process of financial review, control, and reporting.	1	2	3	4	5	6	N/A
	13. Technology: Our organization utilizes technology effectively.	1	2	3	4	5	6	N/A
	14. Facility/Office: Our facility/office is well organized, maintained, meets the needs of the existing programs, and enables expansion opportunities as they arise.	1	2	3	4	5	6	N/A
Strategic Planning	**15. Plan**: We have an up-to-date strategic plan.	1	2	3	4	5	6	N/A
	16. Process: We regularly review, revise and measure progress on our strategic plan.	1	2	3	4	5	6	N/A

III. SWOT Analysis

The following set of four questions is known as a SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats). This is a time-tested strategic planning tool designed to efficiently and effectively aid in analyzing an organization.

Internal Strengths: What, specifically, are up to three of your organization's greatest internal strengths?	1.
	2.
	3.
Internal Weaknesses: What, specifically, are up to three of your organization's greatest internal weaknesses?	1.
	2.
	3.
External Opportunities: What, specifically, are up to three of your organization's greatest external opportunities?	1.
	2.
	3.
External Threats: What, specifically, are up to three of your organization's greatest external threats?	1.
	2.
	3.

IV. Priorities

Priorities: What, specifically, should your organization's top three priorities be over the next year?	1.
	2.
	3.

V. Final Thoughts (Optional)

This checkup may have sparked ideas, comments, or visions of areas to elevate or improve. Provide comments or notes about these areas (or others not listed) that will aid in the overall assessment.	