Organizational Vision

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.

NOTE: As you'll see on the following pages, this assessment references a three-year vision. Although three years is a common timeframe for organizational visioning, feel free to use a different time frame that may better suit your needs.

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I. General Information

Your Name	
Your Role in the Organization	
Date	

II. Three-year Focus Area Visions

A. Focus Area: Programs/Services
Three-year Vision: As specifically as possible, describe what you hope your organization's programs / services will look like in three years.
Actions: Specifically, what needs to happen to make your vision in the above row become a reality?
B. Focus Area: People
Three-year Vision -- Staffing: As specifically as possible, describe what you hope your organization's staffing structure and composition will look like in three years. (Be sure that your vision includes the number of staff persons that you hope are employed in three years.)
Actions: Specifically, what needs to happen to make your vision in the above row become a reality?
Three-year Vision -- Board of Directors: As specifically as possible, describe what you hope your board of directors' structure and composition will look like in three years. (Be sure that your vision includes the number of board members in three years.) NOTE: If your organization is a project of a fiscal sponsor and doesn't have an official board of directors then answer this question with your advisory board/council in mind.
Actions: Specifically, what needs to happen to make your vision in the above row become a reality?

C. Focus Area: Fund Development

Three-year Vision: As specifically as possible, describe what you hope your organization's fund development results and processes look like in three years. (Be sure that your vision includes a specific amount of the total income/revenue that you hope is raised annually in three years.)

Actions: Specifically, what needs to happen to make your vision in the above row become a reality?

D. Focus Area: Operations

Three-year Vision: As specifically as possible, describe what you hope your organization's overall operations will look like in three years. ("Operations" refers to things like financial management, human resource policies, risk management, facility maintenance, office management, etc.)

Actions: Specifically, what needs to happen to make your vision in the above row become a reality?

E. Focus Area: Marketing

Three-year Vision: As specifically as possible, describe what you hope your organization's marketing will look like in three years. (The Marketing focus area can include issues of branding strategy, customer/stakeholder identification, digital communications, events, etc.).

Actions: Specifically, what needs to happen to make your vision in the above row become a reality?

F. Focus Area: Strategic Planning
Three-year Vision: As specifically as possible, describe what you hope your organization's strategic planning process will look like in three years.
Actions: Specifically, what needs to happen to make your vision in the above row become a reality?

III. 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.