



Checkup for Small Organizations

Hello,

When was the last time that you paused and gave your organization a checkup?

On the following pages you'll be asked a set of questions intended to provide insights regarding your organization's capacity and strategy. Working quickly, the assessment will take about 15 minutes. You can take this assessment alone or in concert with others.

All the best,

The Mission Met Team

General Information

1. Name of your organization:

2. Your name(s):

3. Your primary role:

Staff member

Board member

Other:

4. Today's date:

5. Organization's EIN (Employer Identification Number):

Your organization's EIN is used to match other responses from your organization.

Mission, Vision, and Values

6. MISSION STATEMENT: We have an up-to-date mission statement that is brief, well-communicated, and used as a filter for key decisions.

Absolutely not!

No

Not really

Sort of

Yes

Absolutely yes!

Not applicable, don't know, or doesn't exist

7. VISION STATEMENT: We have an up-to-date vision statement that is brief, well-communicated, and used as a filter for key decisions.

Absolutely not!

No

- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

8. VALUES: We have an up-to-date set of organization values that guide our thoughts and actions.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Focus Area: Programs/Services

9. PROGRAMS/SERVICES: We have a focused, effective, and well-organized program(s)/service(s).

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

10. KEY METRICS: We have a small set of key metrics that we use to measure the success of our program(s)/service(s).

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!

Not applicable, don't know, or doesn't exist

Focus Area: People

11. BOARD OF DIRECTORS: Our board of directors governs the organization effectively.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

12. STAFF: Our staff has the skills and capacity needed to run the organization effectively.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

13. VOLUNTEERS: We have a sufficient number of volunteers that are effectively trained and engaged.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Focus Area: Fundraising/Revenue Generation

14. PLAN: We have an up-to-date fund development plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

15. PROCESS: We regularly review, revise, and measure progress on our fund development plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Focus Area: Marketing

16. PLAN: We have an up-to-date marketing plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

17. PROCESS: We regularly review, revise, and measure progress on our marketing plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Focus Area: Operations

18. FINANCIAL MANAGEMENT: We implement a regular process of financial review, control, and reporting.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

19. TECHNOLOGY: Our organization utilizes technology effectively.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

20. FACILITY/OFFICE: Our facility/office is well-organized, maintained, meets the needs of the existing programs, and enables expansion opportunities as they arise.

- Absolutely not!
- No

- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Strategic Planning

21. PLAN: We have an up-to-date strategic plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

22. PROCESS: We regularly review, revise, and measure progress on our strategic plan.

- Absolutely not!
- No
- Not really
- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

Diversity, Equity, and Inclusion (DEI)

23. DIVERSITY, EQUITY, AND INCLUSION: We have a DEI policy that provides guidance in our operations and strategy.

- Absolutely not!
- No
- Not really

- Sort of
- Yes
- Absolutely yes!
- Not applicable, don't know, or doesn't exist

SWOT Analysis

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

24. INTERNAL STRENGTHS: What, specifically, are up to three of your organization's greatest internal strengths?

25. INTERNAL WEAKNESSES: What, specifically, are up to three of your organization's greatest internal weaknesses?

26. EXTERNAL OPPORTUNITIES: What, specifically, are up to three of your organization's external opportunities?

27. EXTERNAL THREATS: What, specifically, are up to three of your organization's greatest external threats?

28. PRIORITIES: What, specifically, should your organization's top three priorities be over the next year?

Final Thoughts

29. (Optional) FINAL THOUGHTS: 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.