

| Capacity to Be Evaluated | Emerging | Stable | Sustainable |
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| Mission, Vision & Strategic Plan | Focus has jelled into mission  Some boundaries in place (market, clients served) | Mission is clear expression of focus which reflects values & purpose (social impact)  Strategic plan exists  Minimal knowledge of players & alternative models in program area(s) | Focused approach that’s unique from other players & alternative models  Well defined vision of what organization aspires to become or achieve  Strategic plan of how it will grow capacity in short term to fulfill vision  Community assessment & feedback processes in place  Defined measures of success |
| Board Leadership | Passionate about mission Willing to serve  Focus on operations  May have a committee or 2 | Understands & carries out basic legal & fiduciary responsibilities,  Written policies & procedures,  Clearly defined roles & responsibilities  More focus on policy & planning  Working committees | Focus on policy & long-term planning and governance (less on operations)  Strategic approach to board recruitment & succession,  Clear expectations & accountability for board members,  Orientation for new board members |
| Staff Depth | Small staff  Role clarification is evolving | Staff stable & functioning well  Strong & experienced ED,  Key management roles are clearly differentiated (at least ED & board)  Organizational culture (shared values, widely held mission) exists | Strong organizational culture (mission & vision widely held which directs actions & priorities)  Clearly defined roles & expectations with regular, constructive feedback  Strategic recruitment & succession processes exist  Staff is valued & compensated by organization according to comparable market standards |
| Program Development & Evaluation | Limited measuring & tracking of performance | Programs & services well defined & aligned with mission & goals, Performance measured & progress tracked | Programming modified through regular assessment of needs & evaluation of success  Outcome measures of programs demonstrate community impact |
| Funding, Fundraising & Finances | Basic accounting system in place  Accounting practices conform to accepted standards  Annual budget  Annual fundraising effort in place or being planned | Income exceeds expenses in most years  Financial reporting complete & up-to-date  Some operating reserves in place or at least letter of credit  Development director in place with annual fundraising goals and strategies | Strategic fundraising plan in place that is appropriately staffed and hitting targets  Oversight of financial position by board Demonstrated support & participation of board in fundraising  Balanced portfolio of funding sources  Funder relationship management program, preferably with software to track over time  Endowment & reserve funds are well established |
| Communication & Marketing | Organization’s presence known in target community  Limited use of alliances & partnerships | Numbers & great stories to demonstrate mission success  Up-to-date, clear & jargon-free messaging  Organization respected in community  Building relationships & collaborations with other organizations  Website in place and updated regularly | Communicates ~~a~~ consistent and clearly branded messaging defining organization & every interaction explains and illustrates that notion  Strategic marketing/ communications plan  Strong & content-rich website, effective use of social media  Creates emotional experiences that help connect supporters to the group’s mission and core values |
| Technology, Human Relations & Infrastructure Support Systems | Mostly manual, ad hoc | Electronic databases & management reporting systems exist in a few areas | Database & management reporting systems for tracking clients, staff, volunteers, program outcomes & financial information |

| Capacity to Be Evaluated | Low | Medium | High |
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| Social Innovation |  |  |  |
| Equity |  |  |  |
| SVP Fit |  |  |  |