

| Capacity to Be Evaluated | Emerging | Stable  | Sustainable |
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| Mission, Vision & Strategic Plan | Focus has jelled into missionSome boundaries in place (market, clients served) | Mission is clear expression of focus which reflects values & purpose (social impact)Strategic plan existsMinimal knowledge of players & alternative models in program area(s) | Focused approach that’s unique from other players & alternative modelsWell defined vision of what organization aspires to become or achieveStrategic plan of how it will grow capacity in short term to fulfill visionCommunity assessment & feedback processes in placeDefined measures of success |
| Board Leadership | Passionate about mission Willing to serve Focus on operationsMay have a committee or 2 | Understands & carries out basic legal & fiduciary responsibilities, Written policies & procedures, Clearly defined roles & responsibilitiesMore 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 staffRole clarification is evolving | Staff stable & functioning wellStrong & 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 feedbackStrategic recruitment & succession processes existStaff 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 successOutcome measures of programs demonstrate community impact  |
| Funding, Fundraising & Finances | Basic accounting system in placeAccounting practices conform to accepted standards Annual budgetAnnual fundraising effort in place or being planned | Income exceeds expenses in most yearsFinancial reporting complete & up-to-dateSome operating reserves in place or at least letter of creditDevelopment director in place with annual fundraising goals and strategies | Strategic fundraising plan in place that is appropriately staffed and hitting targetsOversight 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 timeEndowment & reserve funds are well established |
| Communication & Marketing | Organization’s presence known in target communityLimited use of alliances & partnerships | Numbers & great stories to demonstrate mission success Up-to-date, clear & jargon-free messagingOrganization respected in community Building relationships & collaborations with other organizationsWebsite in place and updated regularly | Communicates ~~a~~ consistent and clearly branded messaging defining organization & every interaction explains and illustrates that notionStrategic marketing/ communications planStrong & content-rich website, effective use of social mediaCreates 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 |  |  |  |