

Maximize Your Mission:

The Essential Nonprofit Success Formula

Does your nonprofit have what it takes to thrive in 2025 and beyond? Our assessment tool is here to help you find out! By diving into key areas like strategy, fund development, and talent, you'll get a clear picture of where your organization excels and where there's room for growth. Whether you're refining your strategic plan, improving donor outreach, or building a stronger team, this tool offers practical insights to help you succeed. Ready to elevate your mission and impact? Let's get started!

THE RIGHT PLAN

- Q:** Does your team have an organizational strategic plan?
 - A. No current plan
 - B. Plan is out-of-date, needs to be updated
 - C. Working current plan/adapting plan

- Q:** Does your organization have a written resource development plan?
 - A. Few/No fundraising plans, policies, or systems; little to no donor outreach
 - B. Basic fundraising plan, goals, and metrics to guide work; some donor outreach as needed
 - C. Comprehensive fundraising plan and goals, stewardship strategy, and policies/procedures aligned with overall strategic plan

- Q:** Does your board have an active annual engagement plan that includes clear options and expectations for how members engage, e.g. through committees, giving requirements, or event participation?
 - A. No or outdated plan or expectations shared
 - B. As opportunities to engage arise, options are shared with board
 - C. Meet annually with board members to discuss responsibilities and expectations

- Q:** Does your board participate in an annual retreat to set yearly goals, participate in board growth education, update bylaws, etc.?
 - A. No
 - B. Periodically, e.g. for strategic, anniversary, or campaign planning or special circumstances
 - C. Annually

THE RIGHT RESOURCES

- Q:** Does your organization have a customer (donor) database management system (CRM)?
 - A. Excel-based donor information list
 - B. Donor database software, used minimally
 - C. Donor database software with metric capabilities and consistent procedures used regularly to cultivate donors

- Q:** Does your organization have a Case for Support, a clear, compelling, and concise document describing your mission, impacts, goals, and strategy for accomplishing your goals?
 - A. No written Case for Support document or general communication plan
 - B. Elements of a Case for Support and communication plan
 - C. Consistent Case for Support with active communication plan, content reviewed annually

- Q:** Does your organization have a mechanism to gather and communicate mission impact data?
 - A. No system in place
 - B. Minimal data or feedback gathered (no consistent practice in place)
 - C. Impact data and consumer feedback solicited and tracked consistently

- Q:** Does your organization offer leadership support to its key executives and/or board members?
- A. No coaching available
 - B. Some board/executive coaching is available; small budget assigned
 - C. Board/executive regularly meets with professional development strategists

THE RIGHT PEOPLE

- Q:** How often does your organization experience turnover in key leadership positions?
- A. Every 1 to 2 years
 - B. Every 3 to 9 years
 - C. 10+ years
- Q:** Does your organization have a well-defined organizational structure?
- A. No staffing plan in place, hire as needed
 - B. New positions are created based on the direction of the strategic plan
 - C. Organization's staffing structure aligns with the strategic plan and professional development is in place that proactively supports staff career growth
- Q:** Does your organization have a succession plan for key leadership positions (e.g., executive director, development director, chief financial officer, chief operating officer)?
- A. No succession plan
 - B. Identified key positions where planned transition might occur in the next 3 years, but no plan
 - C. Written succession plan with HR/consulting resources in place; consider internal candidates
- Q:** Does your organization have written onboarding practices for all new hires?
- A. No process in place, inconsistent across hires
 - B. Basic onboarding procedures are in place
 - C. Comprehensive, structured onboarding procedures are in place

Unlocking Your Organization's Potential: Results Breakdown

EMERGING

If your nonprofit has mostly A's in one or more sections, your organization is working on building a strong foundation. Keep going! Also, know there are a number of free resources available to help you on your path.

ESTABLISHED

If your organization has mostly B's, you are working to scale practices and put in place capacity-building strategies to reach the next level. Take the time to develop practices and procedures, engage your stakeholders, and target your moves to maximize your organization's strategic growth and impact.

EXPERT

If your organization has mostly C's, congratulations on having a strong organizational foundation and proven impact, processes, and practices that show your power. The sector is always changing and evolving, as are the needs of our missions and organizations. Stay on top of the game through routine evaluation and education to navigate change.

*From grassroots start-ups to mature nonprofits needing to expand and grow, every organization is unique and we take that personally. We empower our client to imagine what's possible, develop customized solutions, and realize your unique goals. **If you would like to talk more about this assessment and your organization's needs and opportunities, [let's connect!](#)***