



ORG GROWTH CHECKLIST

For established / growing groups



COMMUNICATIONS / MARKETING

Each group/organization has a different approach to getting their message out: infrastructure such as a website, social media pages, and digital/printed newsletters are all effective platforms for informing the community about your work. In the digital age, evaluate what platforms are accessible for you and align with your outreach goals: social media can be a great tool, but it's often not the only tool organizations are using.

- *What are the key messages your group wants to communicate with the public AND are these messages aligned with your mission statement?*
- *Who speaks on behalf of the organization / whose voice is represented?*
- *How do you define the reach of your communications (is there a key audience)?*
- *Where can staff/volunteers access marketing assets (logo, boilerplate language, branding guidance, images)?*

River Network published an [*Inclusive Communications Guide*](#) - use it to better understand how your communications can be more accessible, welcoming, and ethical.



FINANCIAL & LEGAL INFRASTRUCTURE

When an organization starts receiving more funding and/or engaging more community members, there are additional financial and legal risks. Thinking through how to manage additional resources and risk is a statutory task for an organization's leadership team.

- *Does the organization carry insurance, or is it listed as additionally insured on another group's insurance policy?*
- *Who is responsible for bookkeeping, reporting, and other fund management?*
- *What internal controls exist to avoid misuse of funds?*
- *Where can staff/volunteers find information about donors and funders?*
- *Are fundraising files up-to-date and accessible to those who need them?*

For more information on insurance coverage, reference information from a trusted partner: [*Nonprofit Insurance Alliance*](#).



LEADERSHIP: POLICIES & PLANNING

Various elements come together to ensure smooth and sustainable leadership transitions: managing workloads, in-filling capacity, handing off information and duties, and more can be anticipated and well-planned for.

- *Does the organization have by-laws that name how leadership is added or removed from the organization? Or, that name a succession of leadership?*
- *How is/are the leader(s) held accountable for their project file management and record-keeping?*
- *Knowing that healthy turnover of leadership happens every 5-8 years in most groups, are workplans written to accommodate distributed workloads?*
- *Are staff/volunteers exposed to professional development opportunities and/or given opportunities to practice leadership skills, before they might be called upon to serve?*

Check out [this webinar by consultant Karen Strong](#) (Strong Outcomes) from the 2021 HRWA Annual Watershed Conference.



EVALUATION SYSTEMS

Evaluation is an often overlooked tool when considering workplanning and leadership needs. Having a way to constructively evaluate the organization's progress toward its mission, its leadership, and its value in the community will help guide work and identify needs in the future. Evaluation metrics also support fundraising and engagement goals.

- *How are you tracking progress made toward the organization's mission?*
- *What metrics help you understand the organization's impact?*
- *What questions help you understand the effectiveness of your leadership team?*
- *How are volunteers or staff being evaluated to understand their impact?*

Not sure where to start? Check out this [sample board/leadership evaluation template](#), written for nonprofit boards of directors, but easily adjusted for any group.



COMMUNITY ASSESSMENT

Every few years, it's good to take stock of your group's/organization's place in the community. This is often an assessment that happens during a broader strategic planning process, but can be completed internally with some key questions:

- *How does your organization fit into the community's culture?*
- *Who in the community is doing similar/related work to your group?*
- *Who are your allies in the community (collaborators, partners, advocates)?*
- *Does your organization feel unique and relevant to different community groups?*
- *Who in the community is engaging most with your work? Is this aligned with your mission / target audience goals?*