



ORG HEALTH CHECKLIST

For new / early stage / in-transition groups



MISSION STATEMENT

A well-written Mission Statement defines the organization's purpose, guides the work the organization engages in, and clarifies the organization's niche role in the community. A Mission Statement should be succinct: one sentence that clearly states WHY the organization exists.

- *What are the main goals of your mission statement (up to three)?*
- *Does your mission statement state why your organization is unique?*
- *When was the mission statement last revised/updated?*
- *Does the mission statement help you decide what projects and programs are right for your organization?*

Some organizations also have vision and values statements: a vision statement states WHAT the organization will do, and a values statement suggests HOW the organization will achieve it. Not all of these pieces are necessary, but in combination they can help with making clear decisions about how to invest the organization's capacity.



LEADERSHIP

Regardless of whether a group is an incorporated nonprofit organization or a collection of committed community members, it's important to have an organized leadership structure. This could be a co-leader model, a team model, or a working group model - or something unique to your group!

- *How many people currently make up your leadership team?*
- *Do you need to in-fill any expertise or skills on your leadership team?*
- *Does your leadership team model advance the work and values of the organization?*
- *Does the leadership team have a shared understanding of how decisions are made?*

For more information on leadership models, [check out this article](#) from the Johnson Center for Philanthropy at Grand Valley State University.



DEFINED ROLES

Defining roles for those involved in your group or organization serves a number of purposes: avoiding confusion and duplication of efforts, giving individuals the ability to self-manage confidently, guiding work and directing outcomes, and giving folks a sense of purpose. It's a best practice to define roles in writing with a position or role description, similar to a job description.

- *What roles exist in your group/organization?*
- *Which roles need clarity and a written description?*
- *Are any roles/positions out-of-date, and need revision?*
- *Where do you keep/will you keep position descriptions, so members can access them?*



FINANCE / BUDGET

Whether your group/organization is grant-funded, relying on individual donations, or accepting business sponsorships, it's important to understand your revenue and expenses. This will allow you to anticipate an accurate budget and understand what resources you need in the future. Even organizations hosting one or two events per year can benefit from a basic budget!

- *How are you tracking income and expenses (and who is responsible for this?)*
- *How are others involved in the organization made aware of spending / income?*
- *Where can you access your organizational budget?*
- *Does your budget reflect the goals laid out in your workplan/roadmap?*



WORKPLAN (ROADMAP)

A workplan (or roadmap) helps guide the work of the group/organization within a certain timeframe. Some organizations find it helpful to create a 12-month workplan, while others find it more accessible to plan for 3 or 6 months at a time. You can think of a workplan as a “to-do list” for the organization. No matter the timeframe, defining actions in a workplan will help those involved in the organization feel organized, and will advance progress toward the mission.

- *Where can you access the organization's workplan?*
- *Is the workplan up-to-date?*
- *Are others in the organization referring to the workplan regularly?*
- *Does the workplan help you identify the best ways to utilize funds?*

Follow this link to access a [basic workplan template](#) - for guidance on using the template, check out [this short video](#).