

Charitable Advisors Organizational Inventory Tool

With 2020 behind us and looking forward to a better 2021, this simple tool is designed to assist in thinking about ways that your organization can increase its impact and sustainability. In each category, an “ideal” has been presented for you to consider that would be rated as a “5”. You are requested to share your rating as of early 2020, pre-COVID, and then again as of December 2020. The second segment of the inventory survey provides a list of potential responses or actions for 2021.

PART I - SEVEN AREAS TO RATE (SUMMARY EXPLANATIONS)

MEETING COMMUNITY NEEDS/RELEVANT - Our organization has outstanding programs and activities that create the outcomes defined in our mission and vision. We actively engage our key stakeholders and community and change our approaches in response to community needs.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

IMAGE AND INFLUENCE IN THE COMMUNITY - We are viewed as mission-driven, effective, well led, and connected to the people we exist to serve. Our organization is known for taking the initiative to bring people and organizations together to create change.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

FINANCIAL FLEXIBILITY - We have a diverse base of financial supporters. We generate a financial surplus from annual operations and have established a financial reserve that can help us through hard times or enable us to act more quickly to seize an opportunity to serve. Our board and staff members understand and act in their critical roles in cultivating financial support.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

PLANNING, DECISION MAKING, AND ACCOUNTABILITY - Our organization has clearly defined our priorities and path forward through a strategic plan or business plan with goals and timelines. Our culture effectively encourages accountability for both board and staff leaders.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

RIGHT PEOPLE IN RIGHT SEATS (LEADERSHIP/TALENT) - Both board and staff leaders are excited and passionate about the work of our organization. Board leaders back up their passion with their actions. Staff leaders are executing effectively in their roles. Board and staff leaders are conscious of the pressures placed on staff through changes and transitions and provide appropriate supports.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

GROWTH, EXCITEMENT, AND ENERGY - We are on a roll. Our momentum is building, and people want to be part of our efforts. We are energetic and growing as exhibited by the number of people we serve, the number of staff, volunteers, or our budget.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

STRATEGIC PARTNERSHIPS - We routinely develop and nurture partnerships that strengthen our program delivery, connection to our community, and funding. We have a reputation with our partners for creating win-win situations and new partners often seek us out.

	Not like us				Very Much Like Us
January 2020	1	2	3	4	5
December 2020	1	2	3	4	5

PART II – DEFINING PRIORITIES FOR 2021 - Please prioritize what will be most important to your organization in facing the current crisis and preparing for the year ahead.

	NOT A CURRENT PRIORITY	MEDIUM PRIORITY	HIGH PRIORITY
Clarify our purpose/mission/vision			
Update our strategic/business plan			
Develop/Implement a racial/equity plan/strategy			
Board training			
Increase engagement of board members			
ED/CEO Retirement preparation/Succession planning			
Add board members (what skills/connections?)			
Invest in external communications/marketing			
Invest in fundraising people or programs			
Invest in financial forecasting/cost accounting			
Invest in program evaluation/outcomes			
Staff training			
Provide emotional/mental health supports to staff			
Add key staff (what position/skill set?)			
Explore partnership/merger possibilities			
Explore how we responsibly close/suspend operations			

At your request, Charitable Advisors can survey your board and senior staff and provide the results in a virtual debrief.



FOR MORE INFORMATION:

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