

## STATEWIDE AND LOCAL PARTNERS

# Organizational Assessment

Prepared by the Statewide Development Task Force  
Statewide and Local Partners Steering Committee

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Statewide and Local Partnerships Program, Center for Preservation Leadership  
National Trust for Historic Preservation  
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[www.PreservationNation.org](http://www.PreservationNation.org)



Photos courtesy of (clockwise): Cincinnati Preservation Association; Statewide and Local Partners; Connecticut Trust for Historic Preservation.

**Introduction** This Organizational Assessment is a tool for board members and staff to self-assess their organization in five key areas of its operations: Mission, Vision and Strategy; Governance and Leadership; Program Development and Impact; Strategic Relationships; Resource Development; and Internal Operations and Management. The checklist can, more importantly, be used as a forum for group discussions about the status of the organization and its future direction, allowing board members and staff to celebrate successes and identify and address areas of concern.

**Why should you use this document?** A nonprofit organization's success is directly related to the strength of its governance. For a nonprofit preservation organization to sustain and grow its operations and program service delivery long-term, the organization must be governed by a skilled board of directors and led by a knowledgeable staff that delivers services and programs tied to a clear mission. Organizations will flounder over time without a strong foundation established by organizational vision, leadership, and good governance.

## How to use this document

1. We recommend that the process include board members and staff. Both affect the health of the organization.
2. Go at your own pace. There is no set timeline for completion.
3. Discuss one section at a time. You can take them in order or select the section where you feel you need the most discussion.
4. We recommend that board members and staff read through and complete the checklist in advance of a meeting. Follow-up with a group conversation.
5. The checklist is set up to make this process user-friendly and to assist you in assessing what the organization is doing well and what needs a little or a lot of work.
6. Yes/no questions will help you gauge the big picture followed by more detailed questions to help you define your organization's areas of need.
7. A numbered rating system then helps you assess your organization's strengths and weaknesses:
  - 1: Think of this as a **green light**—you are good to go! Your organization has the tools in place in this area.
  - 2: Yellow light—**slow down**, assess what more is needed. This is where your organization can use some development.
  - 3: Red light—**stop** and recognize that you are lacking tools in this area. It is an area that needs development and improvement.
8. Where you recognize that you need work, put down an action step in the column and identify a point person who is accountable.

9. Determine the time frame in which you want the action completed. This will ensure that the process continues to move forward.
10. Finally, you may find that you need additional guidance to help you address problem areas. The Resources / Tools section provides online or print resources to guide you. Hyperlinks to sample documents have also been provided.

**When to use this document?** The assessment provides a roadmap to recognize organizational successes and identify areas for improvement. The process of completing the checklist and the responses will be beneficial to the organization at any point in its annual work plan. However, the assessment can best inform the organization's direction when carried out as part of an annual or semi-annual visioning or strategic planning process.

**How often?** At least every three years. Organizations are most effective when they regularly assess their progress, take into account work still to be done, and chart a course for the future based on strengths and opportunities. This is often achieved through a strategic planning process, which ideally should be completed at least every three years. Challenges and opportunities for the organization can change markedly in that amount of time and the organization must be prepared to respond based on a solid vision. Some organizations may opt to complete the checklist on an annual basis as part of an organizational assessment of achievements and work plan development.

## Tips on how to move forward.

- Consider taking action on items rated #3 and #2;
- Build consensus as to the priority of these items (you will not be able to do everything all at once);
- Assign action items and a point person for each priority;
- With this, you have already created a work plan!
- Ask for regular progress reports at board or committee meetings to ensure the work is moving forward as scheduled;
- Use the resources provided in the resource column;
- Ask for help. Engage your National Trust Regional Office and Statewide and Local Partners Office staff to assist you, especially if you need a tool or resource that has not been provided in the checklist;
- Seek out a mentor (which can be funded by a grant from the Peter H. Brink Leadership Fund). The Partners office can match you with an appropriate mentor.
- Congratulations! You have already begun to put in place additional building blocks for your organization's success. Enjoy the results.

## Mission, Vision, and Strategy

		Action/Point Person	Timeframe	Resources and Tools
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Does the organization have a mission statement?</b>			<a href="#">Sample mission statement (PDF)</a>
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Does the mission statement clearly convey the purpose of the organization?		
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Is the mission statement succinct?		
	Y • N <input type="checkbox"/> <input type="checkbox"/>	Do you use the mission statement in written and oral communications?		
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Does the organization have a vision statement?</b>			<a href="#">Sample vision statement (PDF)</a>
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Does the organization have a business plan?</b>			<a href="#">Planning to Succeed: Preparing a Business Plan for Your Nonprofit Organization, Vicki Gillette, Susan Christian, 2000, NTHP</a>
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Does the organization have a strategic plan?</b>			<a href="#">Strategic Planning for Nonprofit Organizations, Marc Smiley, 1998, NTHP</a>
	Y • N <input type="checkbox"/> <input type="checkbox"/>	Is the strategic plan less than five years old?		
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Does the plan set realistic goals for the next year?		
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Does the plan set realistic goals for the next three-to-five years?		
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Does the plan have an implementation strategy including tools such as an annual work plan, committee structure, and budget?		
	1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Are you able to deviate from the plan to take advantage of emerging opportunities and address challenges?		
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Do you use and reference the documents above on a regular basis?</b>			

## Governance and Leadership

1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Has the organization developed governing policies that ensure the organization is managed in a professional manner consistent with sound business practices?</b>			<a href="#">Steering Nonprofits: Advice for Boards and Staff Karl Mathiasen, Susan Gross, Nancy Franco, 1998, NTHP</a>  <a href="#">"Principles &amp; Practices for Nonprofit Excellence," 2005, Minnesota Council of Nonprofits (PDF)</a>
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1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Does your organization have a sustainable work plan ensuring continued evaluation and response to measurement indicators?</b>			<a href="#">Self-Assessment Guide for Community Preservation Organizations (w/CD), Katherine Adams, 2002, NTHP</a>
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Has your organization developed clear and sufficient standards to guide the conduct of staff, board members, and volunteers including</b> <ul style="list-style-type: none"> <li>- Conflict of interest</li> <li>- Sexual harassment</li> <li>- Substance abuse</li> <li>- E-mail and internet usage</li> <li>- Media relations</li> <li>- Whistle blowing</li> <li>- Dress and behavioral codes</li> <li>- Donor discontinue contact policy</li> <li>- Dispute resolution process</li> <li>- Fiduciary expectations and authority</li> </ul>			<a href="#">Sample conflict of interest policy (PDF)</a> <a href="#">Sample sexual harassment policy (PDF)</a> <a href="#">Sample whistle blower policy (PDF)</a> <a href="#">Sample gift and entertainment policy (PDF)</a>
<b>Board of Directors</b>				
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Do the board members have written job descriptions/expectations?</b>			<a href="#">Sample board job description and commitment form (PDF)</a>
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Do you have a board manual or binder?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Do board members and staff collaborate in a congenial and supportive work environment empowered by their enthusiasm for the mission, respect for one another's unique contribution, and enjoyment in working together toward a common vision?</b>			<a href="#">Better Boards Training Workshop</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Has the organization identified the needed skill sets necessary to effectively govern the organization?</b>			<a href="#">Board Self-Assessment Worksheet (PDF)</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Does the Board of Directors consist of members who contribute those necessary skills to effectively govern the organization?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Does the composition of the Board of Directors reflect the diversity of the constituency served?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Are the board members engaged in the governing and leadership of the organization? (Measured by meeting</b>			

	<i>attendance, committee and event participation, and the contribution of financial and other resources)</i>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Are the board members well versed in the organization's mission and able to articulate that mission to others?</b>			<a href="#">Basic Preservation: What Every Board Member Needs to Know (An Introduction to Historic Preservation), 2005, NTHP</a> <a href="#">Sample charitable gifts policy (PDF)</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Do the board members marshal the resources necessary for the organization to fulfill its mission?</b>			<a href="#">Better Boards: Fundraising Training Workshop</a> and <a href="#">Better Boards: Major Gifts Training Workshop</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Is every board member active in financially supporting the organization?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Are opportunities provided for board member skill development?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Is there a succession plan in place to ensure the retention of the board's institutional memory, the maintenance of needed skill sets, and the minimization of interruptions to operations?</b>			
<b>Staff</b>				
Y • N <input type="checkbox"/> <input type="checkbox"/>	<b>Does the organization have professional staff?</b>			<a href="#">Starting with Staff: A Guide for the Nonprofit Board, Christine Graham, 2001, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Is there adequate administrative staffing to support professional positions?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Is the staff composed of individuals who possess the necessary skills to professionally manage the organization?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Are staff members well versed in the organization's mission and able to articulate that mission to others?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Do staff members marshal the resources necessary for the organization to fulfill its mission?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Are opportunities provided for staff member skill development?</b>			<a href="#">Preservation Leadership Training and Preservation Leadership Training/Advanced</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b>Is there a succession plan in place to ensure the retention of the staff's institutional memory, the maintenance of needed skill sets, and the minimization of interruptions to operations?</b>			<a href="#">"Management Guide for Executive Transitions," 1997, NeighborWorks (PDF)</a>

Y • N <input type="checkbox"/> <input type="checkbox"/>	<b><i>Do you have an employee handbook that outlines the organization's personnel policies?</i></b>			<a href="#">"Employee Handbook," 2009, Utah Heritage Foundation (PDF)</a>  <a href="#">Sample Personnel Policy (PDF)</a>
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## Program Development and Impact

1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization have well-defined programs, products, and services that support its mission?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are indicators in place to measure program impact and articulate organizational achievements? (For example, do you set goals for membership, revenue generation, technical assistance, properties preserved?)</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are projects, programs, and events regularly evaluated to ensure alignment with the strategic plan?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are projects, programs, and events regularly evaluated to analyze the return on investment on a cost/benefit basis? Do you include staff time in that calculation?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization consistently communicate its mission, activities, and accomplishments to members, constituents, and the community?</i></b>			<a href="#">Building Support Through Public Relations: A Guide to Nonprofit Preservation Organizations, Olivia Meyer, 1998, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are sufficient preservation tools and financial incentives in place to achieve your preservation objectives including:</i></b> <ul style="list-style-type: none"> <li>- Intervention protocols</li> <li>- Revolving Fund</li> <li>- Grant Fund</li> <li>- Easement Program</li> <li>- Tax Credit Project Assistance</li> <li>- Field Services</li> <li>- Other</li> </ul>			<a href="#">Sample intervention and litigation protocol (PDF)</a>

## Strategic Relationships

1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization have credibility in its community, and is it recognized as an expert in the field?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization successfully partner with national, state, and local preservation organizations; municipalities and government agencies; groups outside of preservation; and private entities and individuals to effect positive</i></b>			

	<b>outcomes?</b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Is the organization politically savvy in both understanding the political process and having a willingness to act upon that knowledge by affirming or interceding in the process?</i></b>			<a href="#">Blueprint for Lobbying, Susan West Montgomery, 2002, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization engage constituents and strategic partners in grassroots advocacy and in identifying issues and priorities in which the organization can play a role?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization foster strong relationships with elected officials to communicate its activities and act as a source for reliable and professional information?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization foster strong relationships with the media to communicate its activities and act as a source for reliable and professional information?</i></b>			<a href="#">Effective Communications for Preservation Nonprofit Organizations, Richard McPherson, Debra Ashmore, Timothy O'leary, 2003, NTHP</a>
<b>Resource Development</b>				
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are diverse and sustainable funding sources in place to adequately support the organization's operations and adapt to changing needs and opportunities?</i></b>			<a href="#">Creating a Fund Raising Plan, Marc Smiley, 2007, NTHP</a>  <a href="#">Successful Fund-Raising Activities for Preservation Organizations, Kerri Rubman, 1998, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization have a large and diverse membership and/or donor base that provides necessary financial, human, and technical resources to the organization?</i></b>			<a href="#">Membership Development: A Guide for Nonprofit Preservation Organizations, Catherine Horsey, Craig Lamb, 1996, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Is an annual resource development plan in place to guide the organization's fundraising activities?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Is everyone in the organization encouraged to participate in resource development after receiving appropriate training to build their fundraising skills, including engaging professional and personal contacts in giving?</i></b>			<a href="#">Better Boards Training: Getting Major Gifts</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization have a good understanding of its audience and the community in which it works?</i></b>			
<b>Internal Operations and Management</b>				
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization have adequate staffing levels, both paid and volunteer, to realize organizational goals?</i></b>			<a href="#">Investing in Volunteers: A Guide to Effective Volunteer Management,</a>

				<a href="#">Esther Hall, 2008, NTHP</a>  <a href="#">Personnel Issues for Preservation Nonprofit Organizations, Karen Peil, 1994, NTHP</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Are professional, qualified, and dedicated employees recruited to staff the organization?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the Board of Directors demonstrate that it values the staff by financially supporting them and encouraging their continued tenure?</i></b>			<a href="#">Statewide and Local Partners 2010 Compensation and Benefits Survey Findings, Statewide and Local Partnerships Office, 2010, NTHP (PDF)</a>
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Is staff leadership provided the necessary autonomy to do his/her job, empowered to expand his/her skills, and recognized for his/her contribution to the organization's success?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Is the organization managed in an ethical manner?</i></b>			
1 • 2 • 3 <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<b><i>Does the organization file required state and national tax returns, reports and other information?</i></b>			<a href="#">Financial Practices Checklist (PDF)</a> <a href="#">Sample records retention policy (PDF)</a>  <a href="#">Legal Considerations in Establishing a Historic Preservation Organization</a> Collette Goodman, Stefan Nagel, 1991, NTHP



# Recommended Publications, Online tools, Sample Documents, and Training

## Mission, Vision, and Strategy

[Sample mission statement \(PDF\)](#)

[Sample vision statement \(PDF\)](#)

[\*Planning to Succeed: Preparing a Business Plan for Your Nonprofit Organization\*, Vicki Gillette, Susan Christian, 2000, NTHP](#)

[\*Strategic Planning for Nonprofit Organizations\*, Marc Smiley, 1998, NTHP](#)

## Governance and Leadership

[\*Steering Nonprofits: Advice for Boards and Staff\*, Karl Mathiasen, Susan Gross, Nancy Franco, 1998, NTHP](#)

[“Principles & Practices for Nonprofit Excellence,” 2005, Minnesota Council of Nonprofits \(PDF\)](#)

[\*Self-Assessment Guide for Community Preservation Organizations \(w/CD\)\*, Katherine Adams, 2002, NTHP](#)

[Sample conflict of interest policy \(PDF\)](#)

[Sample sexual harassment policy \(PDF\)](#)

[Sample whistleblower policy \(PDF\)](#)

[Sample business gift and entertainment policy \(PDF\)](#)

[Sample board job description and commitment form \(PDF\)](#)

[Better Boards Training Workshop](#)

[Board Self-Assessment Work sheet \(PDF\)](#)

[\*Basic Preservation: What Every Board Member Needs to Know \(An Introduction to Historic Preservation\)\*, 2005, NTHP](#)

[Sample charitable gifts acceptance policy \(PDF\)](#)

[Better Boards: Fundraising Training Workshop](#)

[Better Boards: Major Gifts](#)

[Training Workshop](#)

[\*Starting with Staff: A Guide for the Nonprofit Board\*, Christine Graham, 2001, NTHP](#)

[Preservation Leadership Training](#)

[Preservation Leadership Training/Advanced](#)

[“Management Guide for Executive Transitions,” 1997, NeighborWorks \(PDF\)](#)

[“Employee Handbook,” 2009, Utah Heritage Foundation. \(PDF\)](#)

[Sample personnel policy \(PDF\)](#)

## **Program Development and Impact**

[\*Building Support Through Public Relations: A Guide to Nonprofit Preservation Organizations\*, Olivia Meyer, 1998, NTHP](#)

[Sample intervention and litigation protocol \(PDF\)](#)

## **Strategic Relationships**

[\*Blueprint for Lobbying\*, Susan West Montgomery, 2002, NTHP](#)

[\*Effective Communications for Preservation Nonprofit Organizations\*, Richard McPherson, Debra Ashmore, Timothy Oleary, 2003, NTHP](#)

[\*Creating a Fund Raising Plan\*, Marc Smiley, 2007, NTHP](#)

[\*Successful Fund-Raising Activities for Preservation Organizations\*, Kerri Rubman, 1998, NTHP](#)

[\*Membership Development: A Guide for Nonprofit Preservation Organizations\*, Catherine Horsey, Craig Lamb, 1996, NTHP](#)

[Better Boards Training: Getting Major Gifts](#)

## **Internal Operations and Management**

[\*Investing in Volunteers: A Guide to Effective Volunteer Management\*, Esther Hall, 2008, NTHP](#)

[\*Personnel Issues for Preservation Nonprofit Organizations\*, Karen Peil, 1994, NTHP](#)

[Statewide and Local Partners 2010 Compensation and Benefits Survey Findings, Statewide and Local Partnerships Office, 2010, NTHP \(PDF\)](#)

[Financial Practices Checklist \(PDF\)](#)

[\*Legal Considerations in Establishing a Historic Preservation Organization\*, Collette Goodman, Stefan Nagel, 1991, NTHP](#)

[Sample records retention and destruction policy \(PDF\)](#)

## Glossary of Terms

**Business plan:** A comprehensive planning document that clearly describes the developmental objectives of an existing or proposed business or organization. The plan outlines what and how and from where the resources needed to accomplish the objective will be obtained and utilized. Basically, it is a document that describes what you plan to do and how you plan to do it. Typical elements include: an executive summary, service or products to be provided, market research and analysis, organization and management, market and sales strategies, and financials.

**Conflict of Interest:** When the personal or professional concerns of a board member or a staff member affect his or her ability to put the welfare of the organization before personal benefit, a conflict of interest exists.

**Fundraising plan:** A fundraising plan includes a budget, total amount to be raised from donors, number of donors needed to meet goal, timeline, and tasks.

**Implementation strategy:** A list of specific steps and activities required to get to the desired goals.

**Intervention policy:** A policy adopted by an organization to establish an approach to be applied when determining whether a project, legislative action, or any preservation issue should be investigated and a formal position taken by the organization. The policy establishes criteria governing when the organization becomes involved and the appropriate level of involvement.

**Mission statement:** A good mission statement should accurately explain why your organization exists and what it hopes to achieve in the future. It articulates the organization's essential nature, its values, and its work. It should be current, concise and clear.

**Strategic plan:** A working plan that identifies the organization's goals for a certain time period and outlines how these goals will be achieved. Components of a strategic plan include mission statement, outline of goals, objectives, and activities, assessment of current resources, and a strategic analysis.

**Sustainability:** Using resources in a manner that prevents their depletion.

**Succession plan:** Planning for transition of chief leaders in an organization – Chief Executive Officer or Chairman of the Board of Directors. Important elements are clear communication and a transparent process, both within the organization and to external audiences and key stakeholders.

**Vision statement:** Motivates and offers a framework for the mission to grow and change. The vision statement should be a meaningful description of what an organization hopes to make happen.

**Work plan:** A work plan provides a framework for planning activities for a given period of time. It is a guiding document for the activities to be carried out during that time period. Work plans usual cover a 6-12 month period

### Sources:

- BoardSource [www.boardsource.org](http://www.boardsource.org)
- Center for Nonprofit Excellence, <http://www.cfnpe.org/ResourcesTools/NonprofitBusinessPlanOutline/tabid/169/Default.aspx>
- National Council of Nonprofits <http://www.councilofnonprofits.org>
- "Business Plan Development: From Vision, Mission and Values to Implementation." Terri Theissen, Healthcare Georgia Foundation, Publication #24, March 2008. [http://www.healthcaregeorgia.org/uploads/file/HGF\\_Strat\\_Plan.pdf](http://www.healthcaregeorgia.org/uploads/file/HGF_Strat_Plan.pdf)
- "Building and Sustaining Strong, Engaged Programs." Hildy Gottlieb [http://www.help4nonprofits.com/NP\\_Fnd\\_Building\\_Sustaining\\_Programs-Pt1.htm](http://www.help4nonprofits.com/NP_Fnd_Building_Sustaining_Programs-Pt1.htm)
- Texas Commission on the Arts Tool Kit. <http://www.arts.state.tx.us/toolkit/>
- U.S. Small Business Administration. [www.sba.gov](http://www.sba.gov).
- Western Organization of Resource Councils "Guidelines for Preparing a Work Plan." Phil Bartle, PhD. Seattle Community Network. <http://www.scn.org/cmp/modules/pm-pln.htm>
- "Developing a Work Plan." HandsOn Network. [http://www.handsonnetwork.org/files/resources/BP\\_DevelopingAWorkPlan\\_2010\\_HON.pdf](http://www.handsonnetwork.org/files/resources/BP_DevelopingAWorkPlan_2010_HON.pdf)