

Stakeholder Assessment Example



Stakeholder	Typical titles	What would they say your organization's strengths are?	How does your organization help them meet their goals?	What reservations do they have about your organization?	What action are you hoping for this stakeholder to take?	Why should this stakeholder choose your organization over others?
Board Member	N/A	Provides services in areas they care about	Wants to make a direct, local impact	Not sure they are able to be as hands-on as they'd like to be	Donate	Trusted in the community for years
Corporate Donor	Philanthropy Program Officer	Mission directly aligns with giving priorities	Local partner that helps them meet their goals	Don't always have volunteer opportunities for employees	Donate	Our work resonates with potential donors, volunteers, staff
Client	N/A	Customer service first	We meet their immediate needs, while also providing them with the supports to meet their long-term goals	They are reluctant to ask for help	Transition from emergency relief to long-term stability	We treat the whole person

To fill in the next page:

Your organization's stakeholders are the 3-5+ most important groups that impact the future of your organization. This can include groups like clients, funders, board members, etc.

Determine the groups most important to your organization and then fill in the table by answering the questions across the top row.

Stakeholder Assessment Worksheet



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Organization Assessment Example



Scope	Includes	Doesn't Include	Comments
Geography	Sacramento region 7 counties: Sacramento, Placer	Chicago Loop	
Target Demographic	Men, 18 and older	Unaccompanied Youth	
Programs	Shelter Drop in center Outreach programs		Plans for job training and placement to begin in May of this year
Funding Sources	Board Government City State Federal (HUD, HHS) Corporate Foundations Foundations Individuals Program Income Events Interest and Investment Income		
Other	We've focused on developing relationships with the city and other organizations in our space to expand our referral network.		

To fill in the next page:

Start by identifying the geography your organization serves.

Then, identify the individuals your programs serve. Also be specific as to the individuals your programs do not serve.

List your programs and your organization's funding sources.

Feel free to include any other relevant information that paints a picture of where your organization is today.

This information grounds the strategic planning committee in the current realities of your nonprofit, and ensures you're all working off of the same information.

Organization Assessment Worksheet



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Geography			
Target Demographic			
Programs			
Funding Sources			
Other			

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Ecosystem Assessment Example



	Your Organization	Comparator 1	Comparator 2	Comparator 3
Operating Budget	\$3.5M	\$8.4M	\$8.6 M	\$5.5M
Staff Size	40	167	134	142
Clients	Adult men	Men & Women	Men & Women	Youth and Families
Geography	Bronzeville, Auburn Gresham, Englewood, Pilsen, Little Village	Englewood, Bronzeville, Lakeview	Pilsen, Little Village	Wicker Park, Humboldt Park
Programs	Shelter, drop in center, outreach programs	Healthcare, counseling services, drop in center, shelter, transitional living, permanent housing	Emergency shelter, transitional living, permanent housing	Emergency shelter, outreach programs, healthcare, mental health support
Funding Sources	Government, corporate, foundation, individuals, program fees, investments, events	Government, corporate, foundation, individual, program fees, investments	Government, corporate, foundation, individual, program fees, investments, events	Government, corporate, foundation, individual, program fees, investments
Comments			Replaced ED last year	

To fill in the next page:

Choose 3-5 "comparator" organizations or nonprofits that provide similarly aligned services.

You want to get a sense of how they are similar or different from your nonprofit in terms of size, individuals they serve, where they serve them, the programs they offer and how they are funded.

You can do this through web research, media articles, and LinkedIn. You can also review publically available 990s or use websites like Charity Navigator.

Ecosystem Assessment Worksheet



	Your Organization	Comparator 1	Comparator 2	Comparator 3
Operating Budget				
Staff Size		6		
Clients				
Geography				
Programs				
Funding Sources				
Comments				

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Financial Assessment Worksheet



Source of Revenue	Percent of total budget last fiscal year	Percent of total budget current fiscal year	Comments
Board			
Government (city, state, federal)			
Corporate			
Foundations			
Individual			
Program revenue			
Events			
Interest and investment income			

To fill in this page:

Get a sense of your organization's overall financial picture by breaking down your nonprofit's revenue by source. It's important to look at the previous fiscal year as well as your current fiscal year.

In the comments section, list notes on things such as why funding may have changed from last year to this year or what you anticipate from this funding source next fiscal year.

To take this a step further, you can also complete this same exercise for each one of your nonprofit's programs.

Financial Assessment Worksheet



Source of Revenue	Percent of total budget last fiscal year	Percent of total budget current fiscal year	Comments
Board			
Government (city, state, federal)		8	
Corporate			
Foundations			
Individual			
Program revenue			
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SWOT Analysis



STRENGTHS

Fill in

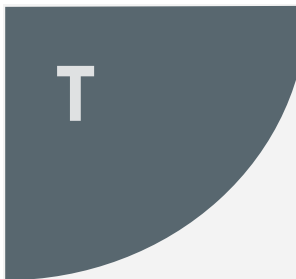
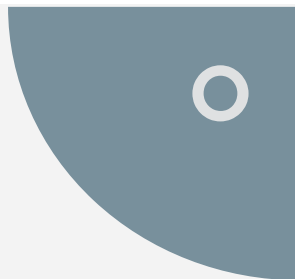
WEAKNESSES

Fill in



OPPORTUNITIES

Fill in



THREATS

Fill in



Strategy Exercise 1: What does our organization look like in 3 years?



To fill in this page:

1. Based on your assessments, come together as a strategic planning committee and discuss your organization's ideal business model and approach in 3 years. The goal of this exercise is to ground everyone in the same, visionary, 3-year picture.
2. Determine the geographies you'd like to serve.
3. Identify who you plan to serve.
4. List out any programs you hope to have.
5. Set a target number for your ideal staff size.
6. Write down any other aspirations you might have as an organization that you hope to achieve within the next three years. Think big and feel free to create additional pages to summarize your ideas.

Scope	Includes	Doesn't Include	Comments
Geography			
Target Demographic	1 0		
Programs			
Funding Sources			
Staff			
Other			

