



NEEDS ASSESSMENT CHECKLIST

We know that you've been working hard on your cause for some time now and that you're not starting from square one. So we are sending you on a scavenger hunt to track down some information on your organization. Use the checklist below to find your starting point.

WHAT'S YOUR STARTING POINT?

The objective of this activity is to take stock of your organization's current state and to get a better sense of what you need. Make a copy of this document and then link the organizational documents you have as you move through the checklist. If you don't know what something is, it's okay for right now. We'll get to it later on!

Once you have tracked down as many as the above documents as possible, please share everything with your team. Your team should read through all of the materials and use them as a starting point for your strategic planning sessions.

Category	Link to Item
Organizational Systems / Internal Capacity	<ul style="list-style-type: none"><input type="checkbox"/> Business plan (formal or lean)<input type="checkbox"/> Incorporation status<input type="checkbox"/> Strategic plan<input type="checkbox"/> Board role descriptions<input type="checkbox"/> Staff job descriptions<input type="checkbox"/> HR materials (Employee Handbook, Onboarding Checklist)<input type="checkbox"/> Governance policies, Financial Policies, Conflict of Interest<input type="checkbox"/> Best practices; analogous organizations
Impact and Evaluation	<ul style="list-style-type: none"><input type="checkbox"/> Logic model, or theory of change<input type="checkbox"/> KPIs; major outputs and outcomes<input type="checkbox"/> Impact tracking sheet<input type="checkbox"/> Evaluation plan<input type="checkbox"/> Surveying material

Financial Sustainability	<input type="checkbox"/> General grant proposal template <input type="checkbox"/> Pitch deck to funders/sponsors <input type="checkbox"/> Development plan <input type="checkbox"/> Annual budget <input type="checkbox"/> Acknowledgement template <input type="checkbox"/> Donor database / CRM system <input type="checkbox"/> Accounting; bookkeeping systems
Communications and Marketing	<input type="checkbox"/> Marketing and communications plan <input type="checkbox"/> Brand guide <input type="checkbox"/> Website <input type="checkbox"/> Social media (Instagram, Facebook, Twitter, Linked-In)