

# Nonprofit Organizational LIFECYCLE ASSESSMENT TOOL

This assessment tool is designed to summarize — in an easy-to-use — chart form the leadership capacity necessary at each stage of the nonprofit lifecycle. It can help focus on which developmental stage or stages your nonprofit is currently passing through and whether its current executive and board leadership capacities are sufficient to sustain it at that stage.

Space is provided below each capacity summary for your own assessment and comments. It is a useful instrument at any time, but particularly when a nonprofit is undertaking an organizational assessment or strategic planning process.

Additional charts included in this assessment tool can be found in [Navigating the Organizational Lifecycle: A Capacity Building Guide for Nonprofit Leaders](#).

LEADERSHIP CAPACITY	START-UP (to begin)	ADOLESCENT (to grow)	MATURE (to sustain)	STAGNANT (to renew)	DEFUNCT (to dissolve)
<b>Board Development</b>	<ul style="list-style-type: none"> <li>• Organization establishes a small homogenous board.</li> <li>• Board develops a clear purpose and vision that is understood by itself, staff, and volunteers.</li> <li>• Board plays a hands-on role in overseeing and managing the organization.</li> <li>• Board conducts an informal performance review of the chief executive.</li> </ul>	<ul style="list-style-type: none"> <li>• Organization expands the size of the board.</li> <li>• Board's role is formalized and there are job descriptions for board members.</li> <li>• Board articulates a clear mission, vision, and set of values and they are well understood by board, staff, and volunteers.</li> <li>• Board clarifies its role in relation to chief executive, increases its planning function, and develops a deliberate decision-making process.</li> <li>• Board conducts a formal annual evaluation of the chief executive and talks about a succession plan.</li> <li>• Board discusses how it is performing and how it needs to improve.</li> </ul>	<ul style="list-style-type: none"> <li>• Organization has a formal nominating process and adds people to the board who represent the community that the organization serves and have skills that the organization requires, such as program, financial, and legal expertise.</li> <li>• Organization affirms or revises its mission, vision, and values, and they are well understood by board, staff, and volunteers.</li> <li>• Board clarifies its role in relation to the chief executive, reduces its operational role, and increases its policy and fundraising function.</li> <li>• Board has committees, work groups, or task forces and, possibly, advisory committees.</li> <li>• Board conducts a formal annual evaluation of the chief executive and creates a succession plan.</li> </ul>	<ul style="list-style-type: none"> <li>• Organization retires some veteran board members who are not engaged and adds new board members who support the renewal effort.</li> <li>• Organization affirms or revises its mission, vision, and values, and they are well understood by board, staff, and volunteers.</li> <li>• The board plays a hands-on role during the renewal effort and ensures the financial viability of the organization.</li> <li>• The board reviews the performance of the chief executive and, if necessary, terminates the person and hires a new one to lead the renewal effort.</li> </ul>	<ul style="list-style-type: none"> <li>• Board ensures that the organization's dissolution process is responsible and orderly.</li> <li>• Board dissolves itself</li> </ul>
Check the best fit for your organization					
Comments on rationale for choice and how much this matters:					

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<b>Executive Leadership Development</b>	<ul style="list-style-type: none"> <li>•Volunteer or staff person founds organization or board hires staff leader.</li> <li>•Staff leader is entrepreneurial and adept at establishing and growing the organization.</li> </ul>	<ul style="list-style-type: none"> <li>•Chief executive's role is distinct in relation to the board.</li> <li>•Chief executive disconnects personal and organizational needs as the organization ages and expands.</li> <li>•Chief executive has the ability to manage the growth of the organization.</li> </ul>	<ul style="list-style-type: none"> <li>•The chief executive and board have distinct roles and they hold each other accountable.</li> <li>•Chief executive is adept at managing a large staff and complex finances and sustaining the organization.</li> <li>•Chief executive forms a strong senior management team, including possibly a chief operating officer.</li> </ul>	<ul style="list-style-type: none"> <li>•Chief executive is adept at managing a turnaround process.</li> </ul>	<ul style="list-style-type: none"> <li>•Chief executive completes his or her duties and leaves the organization.</li> </ul>
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<b>Comments on rationale for choice and how much this matters:</b>					
<b>Leadership Transitions</b>	<ul style="list-style-type: none"> <li>•Board hires chief executive.</li> <li>•Board appoints board chair.</li> </ul>	<ul style="list-style-type: none"> <li>•Board ensures that chief executive has the ability to manage the growth of the organization, and, if necessary, hires a new chief executive who is more able to do so.</li> <li>•Succession plans exist for staff and board leadership.</li> </ul>	<ul style="list-style-type: none"> <li>•Board ensures that chief executive has the ability to sustain the organization and, if necessary, hires a new chief executive who is more able to do so.</li> <li>•Succession plans exist for executive and staff leadership.</li> </ul>	<ul style="list-style-type: none"> <li>•Board determines if chief executive is able to renew the organization and, if necessary, hires a new chief executive who is more able to do so.</li> </ul>	<ul style="list-style-type: none"> <li>•Chief executive leaves job and board dissolves itself in an orderly manner.</li> </ul>
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