

Capacity Improvement Checklist

A starting point for strengthening systems, leadership, and sustainability

1. Mission & Strategy

- Yes In Progress Not Yet Mission and vision clearly guide decisions
- Yes In Progress Not Yet Strategic priorities are documented and aligned
- Yes In Progress Not Yet Programs align with mission and community need

2. Governance & Leadership

- Yes In Progress Not Yet Board and leadership roles are clear
- Yes In Progress Not Yet Board composition reflects needed skills and diversity
- Yes In Progress Not Yet Succession planning is discussed or documented

3. Operations & Structure

- Yes In Progress Not Yet Roles, workflows, and decision authority are clear
- Yes In Progress Not Yet Policies and procedures are documented
- Yes In Progress Not Yet Systems support efficiency (not workarounds)

4. Financial Sustainability

- Yes In Progress Not Yet Budget aligns with strategic priorities
- Yes In Progress Not Yet Financial reports are reviewed regularly
- Yes In Progress Not Yet Revenue streams are diversified

5. People & Culture

- Yes In Progress Not Yet Roles and expectations are clear
- Yes In Progress Not Yet Professional development is supported
- Yes In Progress Not Yet Workload and burnout risks are monitored

6. Data & Learning

- Yes In Progress Not Yet Key metrics or KPIs are defined
- Yes In Progress Not Yet Data informs decisions
- Yes In Progress Not Yet Learning and improvement are ongoing

7. Partnerships & Community

- Yes In Progress Not Yet Key partners are identified and aligned
- Yes In Progress Not Yet Community voice informs strategy
- Yes In Progress Not Yet Partnerships add mission value

8. Risk & Readiness

- Yes In Progress Not Yet Key risks are identified
- Yes In Progress Not Yet Compliance and data security are addressed
- Yes In Progress Not Yet Continuity or emergency planning exists

Top 3 Capacity Priorities (next 6–12 months):

1.	
2.	
3.	

Assessment creates insight. Action creates impact.

You’ve taken the first step, now let’s make it actionable. Completing the Capacity Improvement Checklist gives you clarity on where your organization is strong and where targeted support could make the biggest difference. Madrigal Coaching & Consulting works alongside leaders, boards, and teams to translate assessment findings into focused capacity-building strategies and explore options tailored to your organization’s goals, capacity, and stage of growth.