



RAICES
Coaching & Consulting

Organizational Life Cycle Self-Scan Worksheet

This quick self-assessment helps you reflect on which areas of your organization are aligned with its current life cycle stage—and which might need more attention or support. For each of the seven arenas below, rate where you believe your organization is right now using the following scale:

- 1 – Very Early Stage
- 2 – Developing, but Inconsistent
- 3 – Functioning with Some Gaps
- 4 – Stable and Aligned
- 5 – Strong and Evolving with Intentionality

1. Leadership / Management

(Executive and senior leadership clarity, strategic decision-making, alignment)

Rating: ____

Comments:

2. Finances

(Funding sustainability, budget management, reserves, fundraising capacity)

Rating: ____

Comments:

3. Administrative Systems / Operations

(Internal infrastructure—HR, IT, compliance, internal systems)

Rating: ____

Comments:

4. Marketing / Community Outreach

(Branding, storytelling, community engagement, public visibility)

Rating: ____

Comments:

5. Governance / Board

(Board structure, engagement, role clarity, oversight)

Rating: ____

Comments:

6. Staffing

(Team capacity, role clarity, recruitment, retention, workload distribution)

Rating: ____

Comments:

7. Programs / Services

(Clarity, effectiveness, relevance, responsiveness to community needs)

Rating: ____

Comments:

Reflection Questions:

- Which area(s) scored the lowest? What might that reveal?
- Which areas are most aligned with your mission or goals?
- Where is your organization overextended or out of sync with its current capacity?
- What kind of leadership or support is needed to move toward balance?

This tool is adapted from Judith Sharken Simon's framework in The Five Life Stages of Nonprofit Organizations.