

# GROWTH TOOLKIT

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**LET US KNOW IF YOU NEED HELP FACILITATING THIS GROWTH STRATEGY.**

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# MISSION TO GROWTH ALIGNMENT

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**Purpose:** Ensure that all growth discussions are grounded in the organization's mission and current strategic priorities. This template should be reviewed annually or whenever significant growth opportunities are considered.

**Board Role:** Confirm strategic focus, identify guardrails to prevent mission drift, and agree on what success looks like. This is not an operational exercise; the board should focus on direction and boundaries.  
**Time Allocation:** 45–60 minutes (discussion-focused).

## Board Instructions



### ● Mission Anchor

- A. Mission Statement:
- B. Primary Community Served:
- C. Core Problem the Organization Exists to Solve:

### ● Impact Focus

- Next 12–24 Months
- Top 1–2 outcomes that matter most right now:

### ● Growth Levers

(Check all that apply)

- Program Expansion
- Geographic Reach
- Funding & Revenue
- Partnerships
- Capacity  
(Staff, Systems, Volunteers)

### ● Strategic Guardrails

- Growth areas we will not pursue:
- Programs or activities to pause or stop:

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### ● Success Definition

3–5 indicators that demonstrate mission-aligned growth:

1. Increase impact per dollar spent
2. Expansion of services to priority service areas
3. Diverse mission aligned revenue



# GROWTH ASSESSMENT

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## Board Instructions

**Purpose:** Translate mission-aligned growth goals into a small number of realistic, high-impact strategic initiatives.

**Board Role:** Stress-test priorities, ensure alignment with financial and organizational capacity, and confirm sequencing. Avoid adding initiatives beyond what staff capacity can support.

**Time Allocation:** 60–90 minutes, often used in retreat or budget-planning sessions.



### Growth Objective

We will grow by \_\_\_\_\_ so that \_\_\_\_\_

### Target Population / Stakeholders

- Primary beneficiaries:
- Key supporters (donors, partners, staff):

### Key Initiatives (Maximum of 3)

- For each initiative include description, mission relevance, and expected impact.

### Capacity Check

- Skills required:
- Tools or systems required:
- Estimated cost (Low / Medium / High):

### Existing vs. new resources:

- Assessing if current resources are enough or;
- if new ones are needed

### Timeline

- Short-term (0–6 months):
- Mid-term (6–18 months):
- Long-term (18+ months):

### Risks & Assumptions

- Key assumptions:
- Primary risks if capacity is stretched:

## Success Definition

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