ORGANIZATIONAL SNAPSHOT

cataloguing your current resources and operations to identify your best opportunities for design

organizational snapshot

Who are you, what do you do, and how do you do it?

These sound like simple questions, but when we are busy running programs, responding to requests, and managing stakeholder relationships on a daily basis, it's easy to get lost in the weeds.

The purpose of this exercise is to capture the most important details about your organization on a single page. As you design mental health-related programming, this worksheet will serve as a reminder of what you already have. Your existing organization represents both the powerful ways in which you can make a difference, as well as your existing responsibilities and obligations.

instructions

Together with your leadership team, fill out the worksheet from top to bottom, referencing your current realities. You can time-box your snapshot to reflect the past year. Only write down programs, team members, finances, assets, and partners that exist for you right now. Do not write down any from the past or any from your aspirations for the future. The exception to this rule is if you have recently received funding dedicated to a pre-determined activity that you must deliver.

Resist getting too detailed in the worksheet (it's a single page for a reason!). Each team member should be able to look at your snapshot and agree that it represents the key elements of your organization. If you operate more than 4 programs, you may need additional space, but otherwise keep everything on this one page.

Upon completion, explore the following question with your team: Where is there room for us to build our desired mental health program or initiative? Remember that you do not have to create an additional program; perhaps mental health emphasis, training, content, or evaluation can be added to an existing program.

 related tools: swot analysis for mental health, stakeholder mapping, stakeholder risks and mitigations

📷 organizational snapshot

Our mission:

Program 1: activities & participants

Program 2: activities & participants

Program 3: activities & participants

Program 4: activities & participants

People: write their names below each program they help run.

List administrative / non-program workers here:

Financing:
1) Where have your funds come from? List sources.

2) Where does your money go? List expenses.

Assets: List the things your organization owns or uses. Property, equipment, materials, unique ideas and structures, etc.
What does the organization have besides the people involved?

Partners: List the entities or people that you engage with who are not part of your organization.