



LIFE STAGE ASSESSMENT – NONPROFIT GOVERNANCE  
Adapted from The 5 Life Stages of Nonprofit Organization  
By Judith Sharken Simon,  
Amherst H. Wilder Foundation Publishing Center, 2001

STAGE ONE: **Imagine & Inspire** (Can this dream be realized?)

- Begin to locate people who will serve on the board
- Review information on how to start a board
- Draft articles of incorporation and bylaws
- Secure a source of legal, financial & management expertise
- Make the vision explicit – mission, goals, structure, costs

STAGE TWO: **Found & Frame** (How are we going to pull this off?)

- Create a formal governance structure
- Expand the small, passionate, working group that founded the board
- Obtain board training on basic board roles and responsibilities
- Cultivate prospective donors
- Institute basic administrative and record-keeping systems

STAGE THREE: **Ground & Grow** (How can we build this to be viable?)

- Systematize the board recruitment process
- Provide board training on becoming a policy board vs. working board
- Develop board policies and procedures
- Clarify board's role vs. executive director's role
- Develop a strategic plan with objectives

STAGE FOUR: **Produce & Sustain** (How can we sustain the momentum?)

- Formalize an executive director performance review process
- Initiate an annual or biennial board self-assessment
- Develop or revise the board committee structure
- Consider hiring or contracting the fund development function
- Get smart about marketing, technology, strategic planning

STAGE FIVE: **Review & Renew** (What do we need to redesign?)

- Hold board retreat to review the mission & plan for future
- Revitalize the board nominating or board development committee
- Look for collaborative opportunities and new perspectives
- Ensure programs & internal systems are top-notch
- Assure board members are motivated and adequately recognized.