

**MSI Q1 SELF-ASSESSMENT TOOL**

A reflective tool for nonprofit and social impact leaders

Purpose: To help leadership teams pause, assess Q1 progress, and enter Q2 with clarity, alignment, and strategic focus.

SECTION 1: Q1 GOALS & PROGRESS

Priority Area	Planned Q1 Outcome	Status (Achieved / In Progress / Not Started)	Notes / Observations

SECTION 2: KEY LEARNINGS**What worked well in Q1?**

Think about team collaboration, systems, resourcing, communication, board engagement, etc.

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What created challenges or delays?

Think about internal barriers, shifting priorities, external events, capacity issues, etc.

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Were any of our assumptions off-track?

E.g., partner readiness, timeframes, funding expectations, staff availability

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SECTION 3: TEAM ENERGY & ENGAGEMENT

Prompt	Reflection / Notes
How would we describe the current morale and energy of our team?	
What feedback have we heard from staff or key stakeholders?	
Are we creating space for learning and feedback?	
Are we operating in a way that reflects our values and culture?	

SECTION 4: STRATEGIC ALIGNMENT CHECK

Prompt	Yes / No / Partially	Reflection / Notes
Are we clear on our strategic priorities?		
Do our Q1 activities align with our mission and vision?		
Has anything shifted in the external landscape that affects our focus?		
Is there anything we need to stop, start, or change in Q2?		

SECTION 5: Q2 FOCUS & NEXT STEPS

What are our top 3 priorities for Q2?

1

2

3

What lessons from Q1 should influence how we approach Q2?

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What support, resourcing, or collaboration do we need to succeed in Q2?

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How will we stay accountable and check in on these priorities?

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TRAFFIC LIGHT CHECK-IN

Area	Green = On Track	Yellow = Needs Attention	Red = Off Track
Strategy Alignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team Energy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Governance & Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial Health	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Key Projects & Priorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NOTES & ACTION POINTS

(Use this space to summarise key insights and assign next steps.)



MOSAIC
SOCIAL IMPACT