









Assessing Your Capabilities Worksheet

		Your Organization	 SERVICES PROVIDER	 CAPITAL PROVIDER	 INNOVATOR	 CAPACITY BUILDER	 FUNDER	 CONVENER	 ADVOCATE	 INVESTIGATOR
			Direct Operator ← → Intermediary							
Execution	Small Business Service Delivery		✓							
	Small Business Capital Administration & Servicing			✓						
	Program & Product Design		✓	✓	✓	✓				
	Quality Control & Compliance		✓	✓	✓	✓	✓			
	Impact Measurement & Evaluation				✓					✓
	Community Small Business Engagement		✓	✓				✓	✓	
	Fundraising		✓	✓			✓			
Planning	Reputation & Credibility in Small Business Work		✓	✓		✓		✓	✓	
	Awareness Building								✓	
	Partner Management				✓	✓	✓	✓		✓
	Research & Analysis								✓	✓
	Strategy-setting							✓	✓	✓

Comparing Your Capabilities to Your Peers Worksheet

	YOUR ORGANIZATION	PEER ORGANIZATION 1	PEER ORGANIZATION 2	PEER ORGANIZATION 3	PEER ORGANIZATION 4
Execution ↑	Small Business Service Delivery				
	Small Business Capital Administration & Servicing				
	Program & Product Design				
	Quality Control & Compliance				
	Impact Measurement & Evaluation				
	Community Small Business Engagement				
	Fundraising				
	Reputation & Credibility in Small Business Work				
	Awareness Building				
	Partner Management				
Planning ↓	Research & Analysis				
	Strategy-setting				

Implementation Planning Worksheet

		TIMELINE FOR IMPLEMENTATION				LONGER-TERM SUSTAINABILITY CONSIDERATIONS
		First 30 – 90 Days	First Six Months	First Year	Second Year	
IMPLEMENTATION PLAN						
KEY MILESTONES						