

How Can I Quickly Determine The Capacity Level Of My Nonprofit?

Mini/Basic Nonprofit Organizational Self-Assessment

Instructions: Complete the following chart as honestly as possible, indicating your nonprofit's relationship to each operational statement. Definitions of each relationship:

No: We have not thought about this issue at all.

Not Yet: We have recognized this is an issue, but are not yet actively working on addressing it.

In Progress: We are working on this issue, but have not finalized it or added a new policy or procedure.

Yes: We currently have policies and procedures in place that we actively follow about this issue.

Issue	No	Not Yet	In Progress	Yes
1. Board members have written job descriptions & receive an orientation & training.				
2. Organizational leadership builds a relationship with each individual board member, and speaks with each about how they both can and would like to help strengthen the organization.				
3. Every board member is actively attending meetings and contributing in some way.				
4. Board size is not too small (little oversight/support), or more importantly, too large (inactive).				
5. A policy & procedure is in place to ensure diversity in board, staff & volunteer personnel.				
6. Updated policies & procedures ensure consistency & quality throughout the organization.				
7. A finance committee meets at least quarterly & reviews budgets & financial statements.				
8. Finance committee annually engages third-party accountant to review/report activity to board.				
9. Board policy concerning the amount of operating reserves kept on hand for emergencies.				
10. Board has a long-term strategic plan & monitors set milestones for objectives and timelines.				
11. Organization establishes an annual plan with objectives consistent with the strategic plan.				
12. Organization has a diversified funding strategy including multiple streams, including earned income, government sources, foundations, corporations, individuals, endowments, events, etc.				
13. Board recognizes the role it must play in resource development, is actively engaged and personally gives to the organization each year.				
14. The market is regularly assessed relative to competition, client need & satisfaction.				
15. Policy & procedures encourage & ensure ongoing training and development of all staff.				
16. Outcomes are regularly measured & benchmarked against outside similar programs.				
17. Program policies and procedures are in place to ensure benchmark data, research on similar programs, and failed efforts are used to continuously improve.				
18. A succession plan is in place, as well as annual goals for leadership development in appropriate staff members. Board leadership is aware of emergency succession plan.				
19. Organization has a public relations plan & process in place.				
20. Every employee, including the president, receive a performance review at least annually, where both the employee & supervisor perform written assessments and review.				
21. Employees are paid a salary and benefits competitive with all sectors.				
22. Organization has a budget & stated financial goals for each program.				
23. Organization has written policies & procedures for accounting, including multiple checks & balances to ensure no one person can control the finances without others knowing.				
24. Organization continuously seeks collaborative relationships with other organizations.				
25. Technology & systems are in place & regularly updated to support competitive operations/planning.				

For each operational statement in which your answer was anything but "yes", support is available. Contact your local MSO, United Way or Community Foundation for more information.