THE NONPROFIT AGENCY

STRUCTURE TO SCALE™ READINESS CHECKLIST

For Purpose-Driven Nonprofits Ready to Go from Overwhelmed to Operationally Excellent

Performance Criteria	Overall Performance Rating

SECTION 1: FOUNDATION

- ○ We have clearly defined mission and vision statements that are distinct and actionable
- ○ Our core values guide decision-making at every levelApplies job knowledge effectively.
- ○ Every board member and staff person can articulate our mission in under 30 seconds
- ○ We have a clear, written impact statement that aligns with our programming
- ○ Our programs directly support our mission without distraction or drift

SECTION 2: FORMATION

- ○ Our organizational chart is current and reflects how we actually operate
- ○ Everyone on staff knows who they report to and what their core responsibilities are
- ○ We've assessed team strengths and realigned roles where needed
- ○ We are not person-dependent in key roles (i.e., no one person holds all the knowledge)
- ○ We have clear onboarding plans for new hires and board members

SECTION 3: FUNCTION

- ○ We use at least one centralized system to track data, relationships, and results
- ○ Every major process has a documented SOP (Standard Operating Procedure)
- ○ Our team has an internal communication system (Slack, email policy, etc.)
- ○ We can onboard a new team member using existing documentation
- ○ Calendars, reporting timelines, and task management are tracked in a shared platform

SECTION 4: FLOW

- ○ Our team can access the data and tools they need without delays or silos
- ○ We have clear handoff procedures between departments or roles
- ○ Data flows between programs, finance, and development without bottlenecks
- ○ We've systematized recurring reports (grant reports, program evaluations, etc.)
- ○ Everyone knows where to find the most updated version of shared documents

SECTION 5: FREEDOM

- ○ If the ED or CEO stepped away for 30 days, operations would continue without collapse
- ○ We have a pre-built data system that feeds our annual report or funder updates
- ○ Leadership development and succession planning is in place
- ○ Our org is 'hit-by-a-bus ready'—key knowledge is shared, not siloed
- ○ We've identified what can scale, what must pause, and what needs to evolve

TOTAL SCORE: _____ / 25

- ○ 21–25: You're structurally strong and ready to scale
- ○ 15–20: Solid foundation—start optimizing and documenting
- ○ Below 15: Stop chasing growth. Start building systems.

READY TO BUILD YOUR INFRASTRUCTURE FOR IMPACT?
Let's discuss how Structure to Scale™ positions your organization for lasting growth. Reach out to connect.

✉ Email: info@pfalashaharrison.com
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