

Health Through Action

Capacity Building Session: Assessment Tool for Nonprofit Organization¹

This assessment tool is designed

- 1) to provide insights on the stages of development of an organization;
- 2) to provide benchmarks to gauge an organization; and
- 3) as a tool for staff and board to develop their organization.

Instructions

On a scale of 1-5 (1=least like us; 5=most like us), circle the number that best represents the current state of your organization for each question. After each section is completed, please add up the scores for each section.

¹ This assessment tool is a shortened version of The Nonprofit Life Stage Assessment tool that is available free from Fieldstone Alliance. <http://surveys.wilder.org/fieldstone/lifestages/>

A. Governance

- 1. The organization is still primarily reacting to external forces more than planning how the organization will take advantage of external forces “on the horizon”.

1 2 3 4 5

- 2. Our organization needs to complete or has recently completed a comprehensive strategic planning process.

1 2 3 4 5

- 3. The executive director and the Board have a pretty clear sense of the division of roles and responsibilities for the governance and daily operation of the organization.

1 2 3 4 5

Sub-TOTAL

B. Staff Leadership

- 1. The executive director consciously divides her/his time between tending to the daily operations of the organization and community meeting, meeting with funders, participating in non-profit trade.

1 2 3 4 5

- 2. Our organization has an executive director who understands no-profit finances and organizational development concepts.

1 2 3 4 5

Sub-TOTAL

C. Financing

1. Our organization’s current source(s) of funding are sufficient for the work we are doing.

1 2 3 4 5

2. Our organization has a fundraising plan, not necessarily written, which generally targets specific funding sources rather than a “shotgun” approach to fundraising.

1 2 3 4 5

3. Our organization can produce all financial documents that could be required by a funding source (e.g. multi-year budget, balance sheet, audit, cash flow analysis).

1 2 3 4 5

4. Our organization has a steady cash flow, adequate accounting systems and an efficient budget.

1 2 3 4 5

5. Our organization needs to develop and sustain new financing sources.

1 2 3 4 5

Sub-TOTAL

D. Administrative Systems

1. Our organization tends to follow mostly what is written in state and federal law because we have not written our own policy and procedure manual.

1 2 3 4 5

2. Our organization has and generally uses personnel policies, salary schedules, annual performance reviews and formal job descriptions.

1 2 3 4 5

Sub-TOTAL

E. Staffing

1. The organization does not have clearly identified supervisory and reporting relationships among the volunteers.

1 2 3 4 5

2. Our organization is thinking about what we will eventually need for paid and unpaid staff to un our programs.

1 2 3 4 5

3. Our organization has found a comfortable balance between providing service by the organization exclusively and providing service through join/collaborative ventures.

1 2 3 4 5

Sub-TOTAL

F. Products and Services

1. Our organization thinks our products and services will do well and meet a need but we lack the evaluation systems to know if we are doing well.

1 2 3 4 5

2. The organizations products and services are well-designed and operated.

1 2 3 4 5

3. Our organization has a schedule for conducting evaluation of products and services.

1 2 3 4 5

Sub-TOTAL

TOTAL SCORES