



# Non-Profit Organizational Evaluation

The first step in creating effective change or growth is to understand where we are currently. The following is an organizational evaluation to identify areas of your organization that are working well and areas that need further attention and development. At the end is an opportunity for self-assessment. Feel free to share this evaluation with your Leadership Team and Board of Directors. You may be surprised at the results.

### I. Our Foundation: *Our Organization has a solid Foundation.*

✓ **Our Organization has a clear Mission Statement, Guiding Principles and/or Values, and Vision.**

We know who we are, what we do and why. We know what we want to achieve - the difference our organization will make to our stakeholders, our community, our world. These sentiments are articulated and each of our Board Members, Staff or others involved in Our Organization can articulate the essence of these statements and beliefs.

✓ **Our Organization has a dynamic Board of Directors.**

Our Board is diverse, contributes input, opinions and guidance from many different perspectives, roles, general beliefs and professional backgrounds. Our Board of Directors as individuals has different strengths and weaknesses that help strengthen and diversify Our Organization.

✓ **Our Organization has a Board of Directors united on a common theme.**

Our Organization's Vision, Mission, and Guiding Principles/Values provide commonality for our Board of Directors. Our Board of Directors works well together - respecting each others' contributions and perspectives, communicating effectively and efficiently, and actively participating for the best resolution of the Our Organization. Each Board Member is an excellent reflection of our values and purpose.

✓ **Our Organization has a documented Legacy Plan or Contingency Plan.**

Our Organization is not dependent on a single person(s), but rather has a plan for continuation in case the leadership steps down.

✓ **Our Organization has a documented Strategic Plan.**

We know what we want to achieve, how we are going to achieve it, and what our next steps are. We have outlined goals, activities, timelines and deliverables that are clear and concise. Board Members and those responsible for executing these plans know the goals, or at least where to find the document when they need it.

✓ **Our Organization *is achieving* our Vision.**



### II. Our Structure: *Our Organization is organized to execute Our Strategic Plan.*

✓ **Our Organization has sufficient financial resources.**

We have the financial resources to effectively and efficiently execute Our Strategic Plan. Our Organization's financial base is diverse and steady. Our Organization has created, and maintains, a steady donor base, grant awards and/or public funding. If not optimal, we have a plan to meet our financial goals.

✓ **Our Organization has sufficient human resources.**

We have the people power (paid and/or unpaid) to effectively and efficiently execute Our Strategic Plan. Both the number of people and their experience/expertise/role within Our Organization are optimized. If not optimal, we have a plan to meet our human resource needs.

✓ **The people in Our Organization work as a cohesive team – everyone is on the same bus.**

Our Board of Directors is enthusiastic and supportive of Our Leadership Team and communicates clearly and effectively. Our Leadership Team is enthusiastic and supportive of Our Staff and communicates clearly and effectively.

✓ **Our Organization's Corporate Structure is up-to-date.**

Our Organization has documented and up-to-date By-Laws, Articles of Incorporation, Statements of Conflict of Interest, Whistle-Blower Statements, etc. in compliance with state and federal regulations and 501(c)(3) requirements.

✓ **Our Organization is structured to *achieve* Our Mission.**



### III. Our Operations: *Our Organization possesses the tools we need to support activities.*

✓ **Our Image is consistent with Our Mission.**

Our Organization has a name and logo that is a clear reflection of who we are and what we do. These graphics are in formats and files easily referenced and used by members of Our Organization.

✓ **Our Organization has an articulated and documented Marketing Plan.**

Our Marketing Plan provides guidance and action-steps in building community awareness and education, recruiting stakeholders, volunteers and potential program partners, communicating with possible funders and sponsors and maintaining strong relationships with our donor base. As an Organization, our actions and communications reflect the Guiding Principles/Values articulated in our official statements.

✓ **Our Organization has a presence on the Internet.**

We have a website that clearly communicates who we are, what we do, educates our community and calls for community involvement. Our website has easy-to-find contact information and donation information. Our inbound contact (phone or email) is monitored regularly.

✓ **Our Organization practices Quality Improvement.**

Our Organization has a documented protocol for evaluating and measuring Our Impact and Our Success. Our Organization has a formal Evaluation Plan that collects individual feedback and incorporates that feedback into a Continuous Quality Improvement plan.

✓ **Our Organization operates in alignment with Our Mission.**



**Organizational Self-Assessment**

Attributes	Rating Scale (Which most accurately describes your organization's performance?)				
	Truly Outstanding	Excellent	Good	Just Ok	Poor
<b>Foundational Attributes</b>					
Our Organization has a clear Mission Statement, Guiding Principles and/or Values, and Vision.					
Our Organization has a dynamic Board of Directors.					
Our Organization has a Board of Directors unites on a common theme.					
Our Organization has a documented Legacy Plan or Contingency Plan.					
Our Organization has a recorded Strategic Plan.					
Our Organization <i>is achieving</i> our Vision.					
<b>Structural Attributes</b>					
Our Organization has sufficient human resources.					
The people in Our Organization work as a cohesive team.					
Our Organization has sufficient financial resources.					
Our Organization's Corporate Structure is up-to-date.					
Our Organization is structured to <i>achieve</i> Our Mission.					
<b>Operational Attributes</b>					
Our Image is consistent with Our Mission.					
Our Organization has an articulated and documented Marketing Plan.					
Our Organization has a presence on the Internet.					
Our Organization practices Quality Improvement.					
Our Organization operates in alignment with Our Mission.					



**Our Organization is a work in progress..**

- ✓ The biggest *External / Environmental* obstacles for Our Organization in achieving Our Vision are:


- ✓ The biggest *Internal* obstacles for Our Organization in achieving Our Vision are:


- ✓ Our Organization would like to address these specific goals and / or challenges:
