NON-PROFIT
ORGANIZATIONAL SELF-ASSESSMENT TOOL

No, None, Never	Very Limited, Not Often	Partially, Frequently	Mostly, Regularly	Yes, Fully, Always
1	2	3	4	5

Self Assessment Questions	Self Score Please fill in the answer that best describes your organization
Board and Management	
1. To what extent does the Board understand its role in the organization?	
2. Is there a process for recruiting new board members and providing them with orientation and training?	
3. How well informed are board members and top management concerning nonprofit management issues such as organizational mission, resource development and outcome evaluation?	
4. Are you experienced at strategic planning, modifying plans, and developing contingency plans to meet emerging opportunities and challenges?	
5. To what extent is the board oriented to service delivery effectiveness and business success?	
6. Does management staff have significant experience at contract negotiation and management?	
7. To what extend will the Board be active and entrepreneurial in pursuit of new funding sources?	
Staff and Staff Training	
1. Do you have a formalized staff orientation program?	
2. Do you have an ongoing staff-training program?	
3. Is staff informed concerning funding sources and the need for outcome measurements for client services and program activities?	
4. Does staff understand the mission of the organization and feel a sense of ownership of the mission?	
5. To what extend are staff conflicts handled in a positive fashion?	
6. Does staff exhibit a sense of loyalty to the organization in the community?	

Management Information Systems (MIS)	
1. Do you have a MIS, which can readily retrieve client/program information ?	
2. Does your MIS have integrated functions; service utilization; financial information, client records?	
3. To what extent does your MIS produce information that is used by direct service staff, supervisors, and managers, Board members?	
4. Is information from your MIS used in program planning and resource allocation?	
5. To what extent does your MIS integrate information from various programs and sites?	
6. Is your MIS designed so that client and service information can be reported to all funders?	
7. Does your MIS generate monthly statistical reports for funders, Board of Directors, program managers or others?	
8. Have direct service staff received training on use of MIS program as an enhancement of client services? Do they understand and support its use?	
Organizational Relationships	
1. Is your organization part of any formal collaborative efforts?	
2. To what extent have you implemented referral and business arrangements with other organizations?	
3. Does your organization belong to an association or group that represents organizations of your type?	
4. To what extent are you part of networks or partnerships in your community?	
5. To what extent are you involved in economic arrangements with other service providers such as joint ventures, partnerships or mergers?	
Fiscal Analysis	
1. To what extend is your revenue diversified?	
2. Do you have liquid revenues for at least 2-3 months?	
3. Does your fiscal system, in combination with the MIS, allow analysis of cost per unit of service?	
4. Can the fiscal staff readily compare actual to anticipated revenue and expense by contract?	

Business Office	
1. Is the business office experienced at fee-for service invoicing, contract management?	
2. Does the business office conduct internal audits to ensure that documentation of services is in client records and can withstand an external audit?	
3. To what extent is the business office's invoicing function integrated into your MIS?	
Outcome Evaluation	
1. Do direct service provider staff members understand and accept the importance of the use of outcome evaluation for ongoing program and client service improvement?	
2. Is outcome data routinely collected, analyzed and shared throughout the organization?	
3. Is the collection of data part of the daily or weekly routine of the organization?	
4. Is data used to conduct program planning, target resources and improve delivery of services?	