Nonprofit Organization Health Check

This assessment is designed to help your nonprofit identify areas of strength and opportunities for growth across various aspects of your operations. By completing this questionnaire, you'll gain valuable insights to guide your strategic planning and organizational development efforts. Your responses will be analyzed to provide tailored recommendations for enhancing your nonprofit's effectiveness and impact.

Please answer each question thoughtfully. The assessment should take about 25-30 minutes to complete.

Organizational Overview

- Your email
- Name of your organization
- Name of the person completing this Health Check
- In one sentence, what is your organization's mission?
- How many years has your organization been operating?
- What is your organization's annual budget range?
  - Under $100,000   - $100,000 - $500,000
  - $500,001 - $1 million   - $1 million - $5 million
  - Over $5 million
- How many full-time employees does your organization have?

Impact and Programs

- How do you primarily measure the impact of your programs? (Select all that apply)
  - Number of people served   - Specific outcome metrics
  - Testimonials/stories   - External evaluations
  - We don't consistently measure impact - Other
- What's the most significant challenge you face in achieving your mission?
- On a scale of 1-5, how effective do you believe your programs are in addressing your mission? (1 = Not effective, 5 = Highly effective)

Strategy and Planning

- Do you have a current strategic plan?
  - Yes, updated within the last year
  - Yes, but it's over a year old
  - No, but we're planning to create one
  - No, we don't have a strategic plan
- How often do you review and adjust your organizational strategies?
  - Quarterly
  - Annually
  - Every 2-3 years
  - Only when there's a major change or crisis
  - We don't regularly review our strategies
- What's your biggest challenge in long-term planning?

Leadership and Governance

- How many members are on your board of directors?
- How often does your board meet?
  - Monthly
  - Quarterly
  - Bi-annually
  - Annually
  - Other
- Which of the following board policies or practices does your organization have in place? (Select all that apply)
  - Conflict of interest policy
  - Board member term limits
  - Annual board self-assessment
  - Board member giving policy
  - Whistleblower policy
  - Document retention and destruction policy
  - Executive compensation review process
  - Board orientation for new members
  - None of the above
  - Not sure
- How would you describe the diversity of your leadership team and board?
- Does your board have committees? (Select all that apply)
  - Executive Committee
  - Finance Committee
  - Fundraising/Development Committee
  - Governance/Nominating Committee
  - Program/Mission-related Committee
  - Audit Committee
  - We don't have board committees
  - Other
- What percentage of your board members made a financial contribution to your organization in the last fiscal year?
  - 0-25%
  - 26-50%
  - 51-75%
  - 76-99%
- What's the most pressing leadership challenge your organization faces?

Financial Health and Management

- How many months of operating expenses do you have in reserve?
  - Less than 1 month
  - 1-3 months
  - 3-6 months
  - 6-12 months
  - More than 12 months
- What percentage of your funding comes from individual donations?
- What percentage of your funding comes from corporate donations?
- What percentage of your funding comes from government grants?
- What percentage of your funding comes from foundation grants?
- What percentage of your funding comes from earned income?
- How do you currently manage your bookkeeping and financial reporting?
  - In-house, dedicated financial staff
  - In-house, shared responsibility among staff
  - Outsourced to a professional service
  - Volunteer-managed
  - Board treasurer handles it
  - Other
- On a scale of 1-5, how confident are you in your organization's financial reporting and compliance? (1 = Not at all confident, 5 = Very confident)
- What's your biggest financial management challenge?
- Has your organization conducted a capital campaign in the last 5 years, or is it planning one in the next 2 years?
  - Yes, we've conducted one in the last 5 years
  - Yes, we're planning one in the next 2 years
  - Both: we've conducted one recently and are planning another
  - No, but we're considering it
  - No, we haven't and aren't planning to
  - Not sure what a capital campaign is
- If you've conducted or are planning a capital campaign, what's your biggest related challenge?

Operations, Efficiency, and Technology

- On a scale of 1-5, how would you rate your organization's use of technology to improve operations? (1 = Not at all, 5 = Highly efficient)
- How do you currently manage your IT infrastructure and support?
  - In-house IT staff
  - Volunteer-managed
  - We don't have formal IT management
  - Outsourced to a managed IT service provider
  - Board member or staff handle it as needed
  - Other
- Which of the following technology solutions does your organization currently use? (Select all that apply)
  - Cloud-based file storage and sharing (e.g., Google Drive, Dropbox)
  - Donor management software
  - Project management tools
  - Website content management system
  - None of the above
  - Financial management/accounting software
  - Video conferencing tools
  - Cybersecurity solutions
  - Other
- On a scale of 1-5, how confident are you in your organization's cybersecurity measures? (1 = Not at all confident, 5 = Very confident)
- What's your biggest challenge related to technology or IT management?

Human Resources and Volunteer Management

- How would you describe your staff retention rate?
  - High (low turnover)
  - Average - Low (high turnover)
  - N/A (no paid staff)
- Do you have a volunteer program?
  - Yes, well-established
  - Yes, but it needs improvement
  - No, but we're planning to start one
  - No, we don't use volunteers
- If you have volunteers, approximately how many are actively engaged?
- What's your biggest challenge in managing human resources (staff or volunteers)?

Community Engagement and Marketing

- How do you primarily communicate with your stakeholders? (Select all that apply)

  - Email newsletters
  - Social media
  - Website
  - Direct mail
  - In-person events
  - Phone calls
  - Other

- On a scale of 1-5, how would you rate your organization's brand recognition in your community?
  (1 = Unknown, 5 = Highly recognized)

- What's your biggest challenge in community engagement or marketing?

Adaptation and Innovation

- On a scale of 1-5, how would you rate your organization's ability to innovate?
  (1 = Struggle to innovate, 5 = Highly innovative)

- How has your organization adapted to changes in the past year?

Partnerships and Collaboration

- Do you currently collaborate with other organizations to achieve your mission?
  - Yes, extensively
  - Yes, occasionally
  - No, but we're interested in exploring partnerships
  - No, we prefer to work independently

- What's your biggest challenge in forming or maintaining partnerships?

Future Outlook

- What do you see as the biggest opportunity for your organization in the next 1-3 years?
- In which area do you feel your organization most needs to improve to achieve its goals?
- On a scale of 1-5, how optimistic are you about your organization's future?
  (1 = Not at all optimistic, 5 = Very optimistic)