

**EMERGING NONPROFITS
SELF-ASSESSMENT SURVEY©**

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Please complete the following survey prior to _____ in preparation for attending CNE’s Sustainability Planning for Small Nonprofits. The questions are designed to allow you to candidly and confidentially assess the capabilities and functioning of your organization and to identify those areas of governance and management on which you wish to focus during this training program. Your responses will be held in the strictest confidence and will be made available to you during and following the training session.

If you are a Board member, please how your board would rate the current capabilities and functioning of your organization by selecting the number associated with the degree to which you agree with each statement below. If you are an Executive Director, please rate your organization from your own perspective using the same rating scale.

Governance

1. *Our board members are influential leaders in our community and a large majority of them make significant financial contributions to us annually.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

2. *All members of our board understand their fiduciary and governance responsibilities.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

3. *Many of our board members play significant roles as volunteers, but they understand the difference between their roles as volunteers and as governance leaders.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

4. *Board members evaluate the performance of the board annually.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

Strategic Direction

5. *We have a clear sense of the future direction of our organization.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

6. *Our long-term priorities, strategic initiatives and expected outcomes are outlined in a written plan that is aligned with our financial and staff resources.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

7. *Our board reviews our financial and operational status at each board meeting.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

8. *We look to our Executive Director for leadership in setting priorities, identifying opportunities and ensuring our sustainability.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

Program Delivery

9. *We have identified a target population that we can serve more effectively than other nonprofits.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

10. *We have specific outcome measures for each of our programs which we assess annually.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

11. *We collaborate with other nonprofits, businesses, public officials and community leaders with whom we share common goals, service delivery plans and expected outcomes.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

Program Delivery (cont.)

12. Our programs are established and recognized for their value to the community.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Talent Management

13. We have leadership succession plans in place for our ED, Board Chair and officers to ensure continuity and to ensure the development of future leaders.

Strongly Disagree 1 2 3 4 5 Strongly Agree

14. We have identified the financial resources we will need to add new staff positions as needed and to enhance the development and advancement of high performing staff.

Strongly Disagree 1 2 3 4 5 Strongly Agree

15. Our board conducts an annual review of our ED's performance reviews and sets goals for the coming year.

Strongly Disagree 1 2 3 4 5 Strongly Agree

16. We have a structured program for recruiting, training and deploying volunteers who play critical roles in delivering services or expertise.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Marketing & Communications

17. Our major constituents understand our mission and the value we bring to the community.

Strongly Disagree 1 2 3 4 5 Strongly Agree

Marketing & Communications (cont.)

18. *We have identified our key audiences and communicate with them using a variety of media to convey the messages we want to share with each.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

19. *We have a Marketing Plan, budget marketing funds, and have the necessary staff expertise and other resources to communicate effectively with key audiences.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

Financial Resources & Infrastructure

20. *We operate with a balanced annual budget, and we manage cash flows to ensure that operations are never disrupted.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

21. *We have stable sources of revenue so that we are not dependent on a single source of funds to support programs and staffing.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

22. *We operate with a Fund Development Plan and have a highly qualified person designated to lead our fundraising efforts, including outreach to major donors.*

Strongly Disagree 1 2 3 4 5 Strongly Agree

23. *We have software and trained staff capable of providing timely, accurate information on:*

a. *Our financial status* - Strongly Disagree 1 2 3 4 5 Strongly Agree

b. *Fund development* - Strongly Disagree 1 2 3 4 5 Strongly Agree

c. *Program evaluation*- Strongly Disagree 1 2 3 4 5 Strongly Agree

General Information

24. Our two greatest strengths are:

a. _____

b. _____

Our two biggest challenges are:

a. _____

b. _____

25. Using the graphic below as a guide, indicate the stage in the nonprofit lifecycle you consider your organization to be?

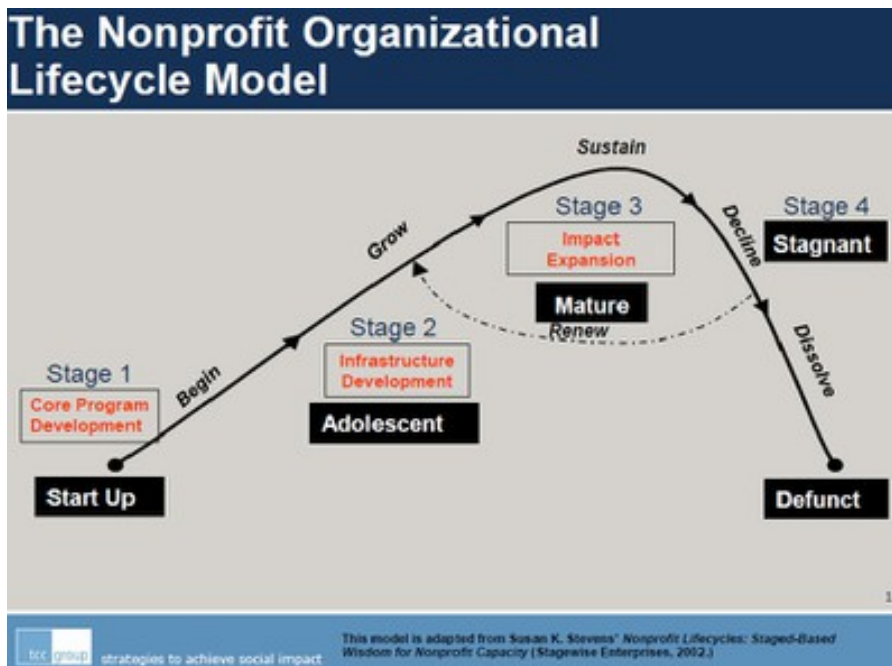
Stage 1

Stage 2

Stage 3

Stage 4

Renew



Name: (optional) _____

Board or ED (circle one)