Operational Fitness Assessment for Nonprofit Organizations

Assessment Approach

1. Best accomplished in live discussion (Zoom works fine) with or without initial scoring by the organization's leaders.
2. Assess each category; check the box(es) indicating the org's status: I.e., Major Issues; Minor Issues; Don't Know; or Seems Okay.
3. Within each category (except those that Seem Okay), specify priority/urgency: Circle **top** and underline **other** concerns/opportunities.
4. Identify whole categories or individual items where more in-depth evaluation is needed to best understand challenges/opportunities.
5. Highlight where external resources could help expedite beneficial results (vs. where qualified internal/local help is available and trusted).

Operational Challenges and Opportunities	Description	Major Issues	Minor Issues	Don't Know	Seems Okay
1) Strategic & Operational Alignment	Clear shared mission and vision; goals and success metrics supporting both; core values stated & embraced; capacity to execute = strategic direction, processes, and resourcing plan (organization and finances); governance / staff synergy & teamwork.				
2) Human Resource Management	Employee policy handbook; online payroll system; HR info system (HRIS); position descriptions; organization chart; legal compliance; employee benefit plans; recruiting/compensation procedures; mission-driven performance management.				
3) Financial Stewardship	Financial management/admin policies; fiscal year and annual budget fits ministry year; fund administration; oversight and control provisions; fund-raising strategy including non-cash giving plan; emergency reserve fund; segregation of duties; accountable reimbursement plan; vendor and procurement guidelines; contract approval and disbursement authority; online bill-pay and reimbursement system; long-term capital plan; fixed asset tracking plus repair/replacement reserve; accounting and financial reporting system; investment policy; annual financial review or audit.				
4) Constituent Management System	Constituent/client/donor database including relationships based on attributes, church, presbytery, etc.; email/text to constituents & groups; e-giving (online, mobile, text-to-give) integrated with designated fund mgt. and donor records; user permissions control; reporting; event management and registration/payment.				
5) Communications & Technology	Organization "brand" identity; vision/mission-aligned communications strategy including oral, print, website, social media, email, text messaging, and phone-blast; content management approach; technology strategy; unified voice communications system; virtual meeting tools; shared email, apps, & online document systems.				
6) Risk Mitigation	Organizational stewardship plan for the governing body; up-to-date legal structure including articles of incorporation and bylaws; religious liberty safeguards; local attorney(s) & insurance broker; commercial & liability insurance; employment & volunteer applications; policies related to conflict of interest, employees, financial administration, sexual misconduct, data/ID protection, records retention, facility use, public/media relations, and emergency response.				

DISCERN STRATEGY ▶▶ ASSESS SITUATION ▶▶ IDENTIFY OPPORTUNITIES ▶▶ PRIORITIZE ACTION ▶▶ EXECUTE WORKPLAN ▶▶ EVALUATE RESULTS