

The Five Elements of a Healthy Nonprofit Self-Assessment Completed on September 8, 2016 by Test Sample Nonprofit

	Item Score	Section Average		Item Score	Section Average
Element 1 - Governance & Boards		2.25	Element 4 - Planning, Technology & Administration		2.23
Board Effectiveness		2.20	Planning and Program Effectiveness		1.75
1.1 MISSION/VISION	3.00		4.1 GOALS AND STRATEGIC PLAN	2.00	
1.2 BOARD ROLES AND RESPONSIBILITIES	2.00		4.2 PROGRAM EFFECTIVENESS	3.00	
1.3 BOARD CHARACTERISTICS	2.00		4.3 EMERGENCY PLAN	1.00	
1.4 STRATEGIC ISSUES AND ORGANIZATIONAL PERFORMANCE	2.00		4.4 EMERGENCY INFORMATION, GO-KIT AND PROVISIONS	1.00	
1.5 BOARD DEVELOPMENT	2.00		Technology		2.43
Board and Executive Relations		2.33	4.5 TECHNOLOGY INFRASTRUCTURE	2.00	
1.6 ORGANIZATIONAL SUPPORT BY BOARD MEMBERS	3.00		4.6 SECURITY AND DISASTER RECOVERY	2.00	
1.7 ALLOCATION OF AUTHORITY TO THE EXECUTIVE	2.00		4.7 DATA COLLECTION AND MANAGEMENT SYSTEMS	2.00	
1.8 EXECUTIVE EVALUATION	2.00		4.8 DATA PROTECTION	3.00	
Element 2 - Fundraising & Financial Management		2.73	4.9 PROGRAM DATA REPORTING	3.00	
Fundraising		2.25	4.10 TECHNOLOGY BUDGET AND RESOURCES	3.00	
2.1 DIVERSE AND STABLE FUNDING	2.00		4.11 FILE SHARING AND COLLABORATION	2.00	
2.2 DONOR STEWARDSHIP	2.00		Administration		2.50
2.3 CULTIVATING POTENTIAL DONORS	2.00		4.12 RISK ASSESSMENT	2.00	
2.4 CHARITABLE DONATIONS AND GIFT ACCEPTANCE POLICIES	3.00		4.13 ETHICS	3.00	
Financial Management		3.00	4.14 MAINTAINING NONPROFIT AND TAX EXEMPT STATUS	N/A	
2.5 FINANCIAL POLICIES AND PROCEDURES	3.00		Element 5 - Management & Culture		2.67
2.6 FINANCIAL REPORTING CAPABILITY	3.00		Culture and Change Management		2.40
2.7 MANAGEMENT REPORTING	3.00		5.1 RESILIENCY AND CHANGE MANAGEMENT	2.00	
2.8 MONITORING FINANCIAL AND BUDGET PERFORMANCE	4.00		5.2 STAFF DIVERSITY	3.00	
2.9 FINANCIAL RESERVES AND CASH FLOW MONITORING	2.00		5.3 INTENTIONAL SUPPORT FOR DIVERSITY AND INCLUSION	2.00	
2.10 BUDGETING AND FINANCIAL PROJECTIONS	3.00		5.4 ORGANIZATIONAL CULTURE	3.00	
2.11 CLEAR BUSINESS MODEL AND TREND ANALYSIS	3.00		5.5 DECISION-MAKING	2.00	
Element 3 - Communications & Relationships		3.13	Human Resources Process		2.80
Communications and Marketing		3.33	5.6 STAFF RECRUITMENT AND RETENTION	3.00	
3.1 COMMUNICATION PLAN	3.00		5.7 JOB DESCRIPTIONS	3.00	
3.2 WEBSITE, SOCIAL MEDIA AND BRAND	3.00		5.8 INTERVIEW PROCESSES	3.00	
3.3 STORYTELLING AND COMMUNICATING IMPACT	4.00		5.9 EMPLOYEE HANDBOOK	2.00	
Advocacy and Relationships		3.00	5.10 NEW EMPLOYEE ORIENTATION	3.00	
3.4 ORGANIZATIONAL STATURE	N/A		5.11 FEEDBACK AND PERFORMANCE REVIEWS	3.00	
3.5 PUBLIC POLICY IMPACT AND PRIORITIES	N/A		5.12 SKILL AND EXPERIENCE OF PERSONNEL	3.00	
3.6 CAUSE BUILDING	3.00		5.13 STAFF COMPENSATION	3.00	
3.7 PARTNERSHIPS	3.00		5.14 SUCCESSION PLANNING	2.00	
Use of Volunteers		3.00	5.15 STAFFING LEVELS	3.00	
3.8 VOLUNTEER PROGRAM MANAGEMENT AND RESOURCING	3.00				
3.9 VOLUNTEER PROGRAM EVALUATION AND PLANNING	3.00				
3.10 TRACKING OF VOLUNTEER DATA	3.00				

Overall Average Score

2.60



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