



SPiN: Strategic Planning in Nonprofits

Nonprofit Snapshot

A quick quiz to take the pulse of your organization's systems and practices

Governance	Yes	No
Do you have a clear mission statement that guides your leadership?		
Do you have an organizational chart that includes the board of directors?		
Are board members aware of the organization's mission and programs?		
Does the board hold regularly schedule board meetings and/or committee meetings?		
Are there written expectations and responsibilities for board members?		
Are board members recruited through a transparent process?		
Do board members contribute to the health of the organization?		
Do you have a conflict of interest policy signed by board members?		
Do board members represent the different demographic groups related to your mission and its implementation?		

Human Resources	Yes	No
Is there an organization chart that describes the roles of staff members?		
Are staff members aware of the organization's mission and programs?		
Are there written job descriptions for each staff member?		
Does the staff hold regularly scheduled meetings?		
Do staff members receive orientation at the start of their employment?		
Do staff members receive regular professional development?		
Are staff members evaluated?		
Is there a succession plan in place for the director and top organization staff members?		
Do you track how many people volunteer during a one year period?		
Are volunteers oriented and supported?		

Communication	Yes	No
Is there a communication plan in place?		
Does your communication include information for donors about impact and finances?		
Do you have an annual report?		
Do you have a donor services system that includes tracking actual and potential donors, tracking money received, thanking donors, and following up some time later with impact statements?		
Do you have a social media outreach plan that grows your community?		
Is every member of your board and staff able to speak in a compelling way about your mission?		

Planning	Yes	No
Does the organization have a strategic plan (or other organizational work plan)?		
Did board members contribute to this plan?		
Did staff members contribute to this plan?		
Is a regular needs assessment of the community performed with written documentation?		
Does the organization have a technology plan?		
Do major programs have a business plan that aligns them with the organization's mission and funding reality?		

Evaluation	Yes	No
Do you know how many people your organization serves? Has served since its founding?		
Is there an evaluation plan in place that measures the impact of programs in the short and long-term?		
Do you track indicators that would prove achievement of the organization's mission?		
Are these indicators reviewed annually/regularly?		
Are program participants tracked in a database?		
Is evaluation a topic during regular staff meetings?		
Is information gathered through evaluation used in program design?		
Is information gathered through evaluation used in communications with donors and extended community?		

Financial Overview	Yes	No
Does the organization have an annual budget?		
Does the organization review the budget after six months?		
Does the organization prepare a bank reconciliation on a monthly basis?		
Does a qualified bookkeeper manage the organization's money day to day?		
Does a different person from the bookkeeper sign checks?		
Does the organization have at least two signatories on the bank account?		
Does an accountant—or someone with accounting experience—serve as the organization's treasurer?		
Does the executive director review expenditures on a monthly basis?		
Does the organization have a printed organization receipt book?		
Are payments made by check?		
Does the organization have a clear system for managing cash?		
Is the accounting function computerized (using a program like Quicken or Quickbooks)?		
Is funding stable and from a diversity of sources?		

Risk Management	Yes	No
Do you maintain minutes of all board meetings?		
Do you file all of the necessary tax documents (local, state, federal)?		
Do you maintain necessary records at necessary levels of government to show nonprofit status?		
Do you maintain enough insurance to protect the organization's assets?		
Do you maintain employment records?		
Do you pay all necessary employment taxes?		
Do you maintain technology safeguards, including backing up systems and virus control?		
Do you maintain a central listing of organization passwords?		
Do you track grants to ensure proper handling of funds?		
Are all formal partnerships clearly outlined in signed agreements?		
Are you protected against patent/copyright infringement?		
Is all documentation related to property up to date?		

