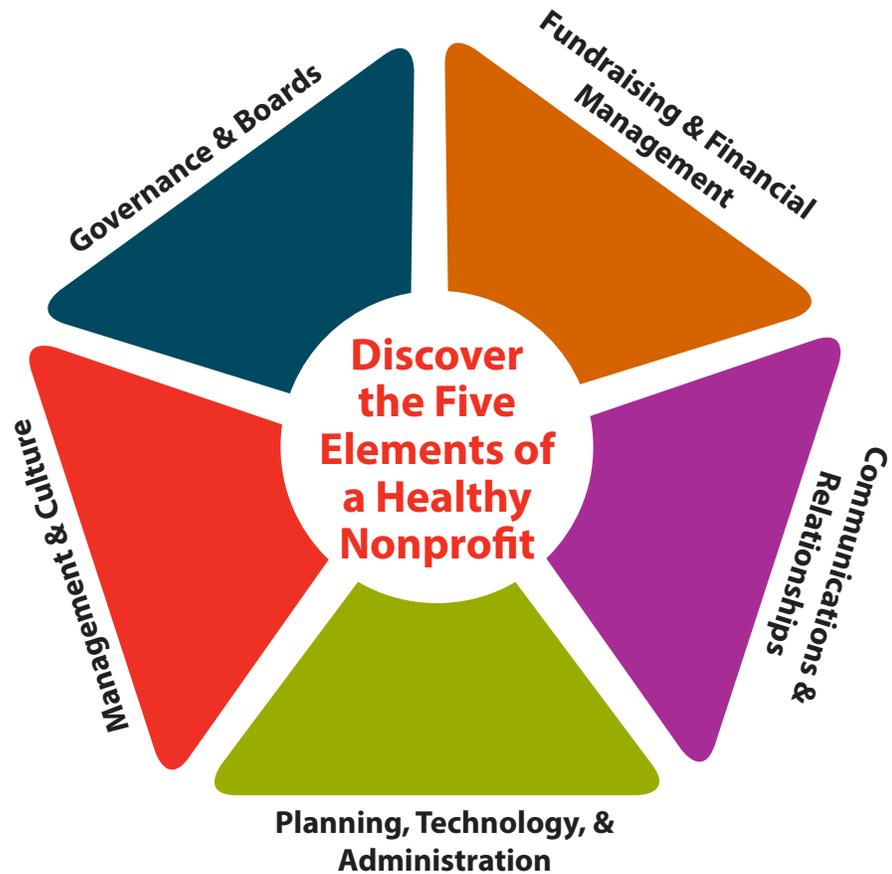




Five Elements Self-Assessment



Presented by





Introduction to the Self-Assessment

You have been invited by your organization to take part in 501 Commons' **Five Elements of a Healthy Nonprofit Self-Assessment**. Here is some background information.

About the Self-Assessment

This self-assessment is drawn from nonprofit research and 501 Commons' experience working with more than a thousand nonprofits. We call this the **Five Elements of a Healthy Nonprofit**. They are:

1. Governance & Boards
2. Fundraising & Financial Management
3. Communications & Relationships
4. Planning, Technology & Administration
5. Management & Culture

In this Self-Assessment, you will review 58 standards (10-15 for each element) and decide how your organization is doing. The Self-Assessment is designed as an educational tool since the standard describes the desired practice.

For each standard you will choose a score, from Level 1 (limited) to Level 4 (very developed), that reflects your perception of the performance of your organization. Knowing where you stand points the way for you to make your organization more effective and resilient.

How to approach the Self-Assessment

No assessment can capture the passion you have for your organization's mission, the leadership qualities found in your staff and board, or the trust those in the community place in your organization. This tool allows you to check to see if you have addressed the operational factors that help you manage risk, deploy your staff and volunteer resources effectively, and put your passion into action.

You have been selected to participate in this Self-Assessment because you have a strong working knowledge of the organization's operational systems. Most people will take about 45 minutes to complete the form. Honest, thoughtful answers will help you identify your priorities for improvement. There is no benefit to inflating your scores. Make your choice quickly without overthinking your response. And enjoy the experience!

Directions

1. Review each standard and choose a response, from Level 1 (limited) to Level 4 (very developed) that reflects your perception of the performance of your organization.
2. Be conservative: When you believe your organization is doing most of Level 2 and also some of Level 3, be conservative and mark Level 2.
3. If you do not feel you have enough information to answer, do not mark a response.



4. In the case where a standard does not apply to your organization, choose “Not applicable.” However, don’t be quick to assume that because a standard is unfamiliar, it does not apply. Even large organizations sometimes skip over important aspects of organizational effectiveness as they grow. If you are not doing something now, consider whether you should be doing it in the future.
5. Bring your completed form to the scheduled assessment team meeting.
6. In the assessment meeting:
 - Pause and refresh your understanding of the standard and your response.
 - Before any discussion, quickly write up your scores for each standard on a white board or paper.
 - Where there is a high level of agreement, quickly design on the appropriate response (Remember: Be conservative).
 - If you have a difference of two or more points stop and discuss the situation in detail to arrive at agreement on how to mark the [online assessment](#).
 - Note: Do not just average the scores – doing so will not give you useful information!

Thank you for your interest in the Self-Assessment. We hope it is very useful to you.



501 Commons, 2016.

This work is licensed under a Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License <http://creativecommons.org/licenses/by-nc-nd/4.0/>