

THE LONG ISLAND CENTER FOR NONPROFIT LEADERSHIP ORGANIZATIONAL ASSESSMENT©

Developed for the Long Island Community Foundation by Patricia Sparks, MSW, 2001
And modified by Ann Marie Thigpen, Director, Long Island Center for Nonprofit Leadership, 2007

INTRODUCTION

This comprehensive organizational assessment instrument, originally developed for the Long Island Community Foundation by Patricia Sparks, MSW, 2001, is a useful learning tool. The Center wants to enable nonprofit organizations to determine where they stand in critical areas of organizational infrastructure and functioning. This assessment can help you get a clear picture of your organization.

Used as a self-assessment this instrument will highlight areas where an organization is strong and alert it to those that might need attention. Regular assessment and acting on the results can help organizations sustain their strengths and consider preventive approaches to any potential problem areas. The assessment can be used on its own or as part of a larger organizational development, strategic planning or consulting process. You can also select segments from the assessment and use them as single entities.

The assessment consists of a series of questionnaires, one in each of the following areas:

- . Mission
- . Board Governance
- . Planning
- . Resource Development
- . External Relations
- . Administration and Management:
 - Executive Leadership
 - Finance
 - Human Resources
 - Program Planning and Evaluation
 - Space, Facilities, Systems, Technology

Not every item on every questionnaire will apply to all organizations but most will have some relevance. For simplicity and consistency, all questions call for “yes/no” responses. Some questions ask for additional details and descriptions.

INTRODUCTION (continued)

Each questionnaire indicates who should complete it. In some instances the questionnaire is to be completed by one person, in others by more than one. Those completed by more than one person should be considered individually and also consolidated for a collective perspective.

Taken together, the responses to the questionnaires can help you gauge the health of your organization. Completing the assessment will require an investment of time and effort, but digesting and acting on the results will pay off in an even more effective organization and one with greater prospects for long-term success.

If you would like to identify technical assistance resources to address your organizational needs, contact The Long Island Center for Nonprofit Leadership by email, linonprofit@adelpi.edu, or phone (516) 877-4429.

We hope this assessment tool will be of assistance to Long Island's nonprofits and welcome feedback from users.

**The Long Island Center for Nonprofit Leadership
ORGANIZATIONAL ASSESSMENT©**

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COVER SHEET

The information provided below provides a brief overview of your organization. All staff and board members should be familiar with this information. This information should be regularly updated and placed in accessible place with current organizational documents.

Name of Organization: _____

Address: _____

Phone: _____ Fax: _____ E-mail: _____

Web site: _____

(If the organization operates at other sites in addition to the above, please attach list.)

Director: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____ E-mail: _____

Mission: _____

Year organization was founded: _____

Is the organization incorporated in the State of New York? Yes ____ No ____

If no, is it qualified to do business in New York? Yes ____ No ____

If yes, date of incorporation: _____

Has the organization applied for federal tax exempt status? Yes ____ No ____

If yes, when? _____

If granted: Date of IRS determination letter: _____ Type of exemption: _____

Is this an advance determination? Yes ____ No ____

If yes, what is the expiration date? _____

Is this a membership organization? Yes ____ No ____

If yes, number of members: _____

Total operating budget for current fiscal year: _____

Last three fiscal years: _____

Number of board members: _____

Number of paid staff - Full time: _____ Part time: _____

Number of volunteers, interns - Full time: _____ Part time: _____

**ORGANIZATIONAL ASSESSMENT©
MISSION QUESTIONNAIRE**

To be completed separately by each of the following:

- Executive
- Board Chair

1. Does the organization have a written Mission Statement? Yes _____ No _____

If yes, please write it here: _____

2. Has your Mission Statement been reviewed within the past three years by the following:

Board of Directors Yes _____ No _____

Staff Yes _____ No _____

Individuals or groups outside your organization who affect, or are affected by, what your organization does

Yes _____ No _____

(please specify): _____

3. If reviewed, was your Mission Statement either:

affirmed Yes _____ No _____

updated or substantially revised Yes _____ No _____

4. In planning and evaluating initiatives and programs, do your board and staff refer to the Mission Statement?

Yes _____ No _____

5. Does your Mission Statement reflect the current needs of your:

community Yes _____ No _____

clients Yes _____ No _____

consumers of service Yes _____ No _____

If yes, how do you ensure that it does (for example, periodic formal community needs assessments, consumer feedback, etc.)?

(A “no” answer to any of these questions indicates the item should be given attention.)

ORGANIZATIONAL ASSESSMENT©

BOARD GOVERNANCE QUESTIONNAIRE

To be completed separately by:

- each board member

Composition/Recruitment

1. Is the composition of the board representative of the organization's constituency with respect to each of the following:

race Yes _____ No _____

ethnicity Yes _____ No _____

gender Yes _____ No _____

age Yes _____ No _____

and is it diverse in terms of length of tenure on the board?

Yes _____ No _____

If no, what's missing? _____

2. Does the composition of the board reflect an adequate range of talents, skills, experience and knowledge?

Yes _____ No _____

If not, what's missing? _____

3. Are procedures for board recruitment clear?

Yes _____ No _____

and do they reflect a broad understanding of board roles and needs?

Yes _____ No _____

BOARD GOVERNANCE QUESTIONNAIRE (continued)

4. Are potential board members fully informed about the organization and what is expected of them prior to being offered a board position?

Yes _____

No _____

5. Do new board members receive an orientation and a board manual that includes at a minimum the by-laws, budget, most recent strategic plan, list of board members and list of current programs?

Yes _____

No _____

6. Is there a statement of roles and responsibilities that all board members sign upon joining?

Yes _____

No _____

7. Does the organization have a pool of potential board members identified for the future?

Yes _____

No _____

Officers/Committees:

8. Does the board have officers and an executive committee to coordinate the work of the board, provide leadership and handle matters between board meetings? A governance committee to oversee the work of the board?

Yes _____

No _____

9. Has the board established standing committees, each guided by a charge issued by the board?

Yes _____

No _____

10. Does each board member serve on at least one committee?

Yes _____

No _____

11. Do board committees meet regularly and report to the board?

Yes _____

No _____

12. Does the organization develop future board members by including non-board members on its committees?

Yes _____

No _____

BOARD GOVERNANCE QUESTIONNAIRE (continued)

Meetings:

13. Has a quorum been present at 90% of board meetings over the past 12 months?

Yes _____ No _____

14. Are board meetings held on a schedule that conforms to the by-laws, well-planned and conducted, with materials available prior to meetings and minutes available shortly thereafter?

Yes _____ No _____

15. Do board meetings begin and end on time? Do they stimulate rather than bore participants?

Yes _____ No _____ Yes _____ No _____

16. Do board meetings deal primarily with policy formulation, financial oversight, resource development, and planning and evaluating the work of the organization?

Yes _____ No _____

Key Responsibilities:

17. Is training available for board members to increase their skills and knowledge in areas related to their board service?

Yes _____ No _____

18. Is there a succession plan in place for future board leadership?

Yes _____ No _____

19. Does the board have a good grasp of issues and matters of concern to the organization, such as community needs, government policies, external trends and best practices within the organization's field?

Yes _____ No _____

20. Has the board established financial management procedures and does the board monitor and review the organization's finances and ensure that necessary taxes are paid on time?

Yes _____ No _____

21. Are all board members involved in some way with raising funds for the organization?

Yes _____ No _____

BOARD GOVERNANCE QUESTIONNAIRE (continued)

22. Does each board member make a financial contribution annually?

Yes _____ No _____

23. Does the board assess its own performance annually?

Yes _____ No _____

24. Does the board hire, and regularly assess, the executive director according to a clear written understanding of that individual's responsibilities and standards for performance?

Yes _____ No _____

25. Does the board delegate to the executive director sufficient authority to reflect the respective organizational roles of board and staff and facilitate the effective day-to-day administration and management of the organization?

Yes _____ No _____

26. Do the by-laws specify terms of office for directors and for officers, with term limits and a provision for rotation of membership on the board and for officers?

Yes _____ No _____

By-laws/Legal Matters:

27. Does the board have, and observe, a formally adopted set of by-laws that sets forth the duties of board members and officers and the procedures by which the board conducts its business?

Yes _____ No _____

28. Have the by-laws been reviewed within the past two years by an attorney who is knowledgeable about not-for-profit law and, if necessary, revised according to the attorney's advice?

Yes _____ No _____

29. Are all board members familiar with the by-laws?

Yes _____ No _____

30. Does the board understand and comply with its legal obligations including making sure that the organization is operating in accordance with its Certificate of Incorporation?

Yes _____ No _____

BOARD GOVERNANCE QUESTIONNAIRE (continued)

31. Does the board observe a formal set of ethical guidelines and policies covering conflict of interest situations?

Yes _____ No _____

32. Does the organization strictly avoid making any loans to directors or officers?

Yes _____ No _____

33. If any compensation is provided to officers and/or directors, is that compensation within legal guidelines for “reasonable” compensation?

Yes _____ No _____

34. Does the board provide for the organization to have ongoing access to legal counsel knowledgeable about not-for-profit law and applicable regulations?

Yes _____ No _____

*(A “no” answer to any of these questions indicates the item should be given attention.
Some of these items may have serious legal implications.)*

ORGANIZATIONAL ASSESSMENT©

PLANNING QUESTIONNAIRE

To be completed separately by each of the following:

- Executive
- Board Chair

1. Is there an ongoing process used by the organization to:

examine internal strengths and weaknesses Yes _____ No _____

examine external trends Yes _____ No _____

establish priorities Yes _____ No _____

systematically plan for the future Yes _____ No _____

Who participates in that process and how? _____

2. Does the organization have a formal strategic plan that was adopted within the past five years?

Yes _____ No _____

If yes, does the plan include details of implementation such as timeframes and persons responsible?

Yes _____ No _____

If yes, has the plan been reviewed and updated annually?

Yes _____ No _____

3. If the organization has a strategic plan, do the board and staff refer to the plan when developing and evaluating initiatives and programs?

Yes _____ No _____

If not, why not? _____

PLANNING QUESTIONNAIRE (continued)

4. Are any of the following operational plans in effect? (If yes, please describe who was instrumental in their creation [board, board committee, staff, others] and when each was last updated. A “no” response indicates that the item should be given attention.)

Fundraising Yes _____ No _____
Who _____ Last updated _____

Program Yes _____ No _____
Who _____ Last updated _____

Staffing Yes _____ No _____
Who _____ Last updated _____

Space/facilities Yes _____ No _____
Who _____ Last updated _____

Technology Yes _____ No _____
Who _____ Last updated _____

Equipment Yes _____ No _____
Who _____ Last updated _____

Other (describe) Yes _____ No _____
Who _____ Last updated _____

ORGANIZATIONAL ASSESSMENT©

ADMINISTRATION AND MANAGEMENT / EXECUTIVE LEADERSHIP QUESTIONNAIRE

To be completed separately by each of the following:

- Executive
- Board Chair
- 10% of staff (in confidence) drawn from various levels

1. Does the executive take steps to articulate the mission of the organization and embody it in all of the programs?

Yes _____

No _____

Please describe: _____

2. Does the executive systematically monitor:

external trends affecting the organization

Yes _____

No _____

state-of-the-art knowledge and best practices
in the organization's field

Yes _____

No _____

state-of-the-art knowledge and best practices
in nonprofit management

Yes _____

No _____

Does the executive bring the above to bear on what the organization does and how?

Yes _____

No _____

Please describe: _____

3. Does the executive monitor the organization's overall performance and effectiveness on an ongoing basis, and implement course corrections as needed?

Yes _____

No _____

ADMINISTRATION AND MANAGEMENT / EXECUTIVE LEADERSHIP QUESTIONNAIRE (continued)

Please describe: _____

4. Does the executive work closely, and in appropriate balance, with the board of directors on:

long-range and annual planning Yes _____ No _____

budgeting Yes _____ No _____

fiscal monitoring Yes _____ No _____

policy and resource development Yes _____ No _____

5. Does the executive see that the board of directors and board committees receive adequate staff support?

Yes _____ No _____

6. Does the executive see to it that the board of directors benefits from the expertise and experience of the staff and hears their voices when engaging in:

policy deliberations Yes _____ No _____

budgeting and planning Yes _____ No _____

Does the executive see that the staff is aware on an ongoing basis of board decisions?

Yes _____ No _____

Please describe: _____

7. Does the executive plan and implement an equitable allocation of internal resources, and distribution of workload, in consultation with staff?

Yes _____ No _____

Please describe: _____

ADMINISTRATION AND MANAGEMENT / EXECUTIVE LEADERSHIP QUESTIONNAIRE (continued)

8. Does the executive provide for ongoing communication with and among staff, including regularly scheduled staff meetings, so that staff has the knowledge and information they need in order to do their jobs as well as a means to offer their ideas about the organization and their work?

Yes _____ No _____

Please describe: _____

9. Does the executive play a key role in fostering positive working conditions and working relationships throughout the organization, including:

problem-solving Yes _____ No _____

stress reduction Yes _____ No _____

recognition and rewards Yes _____ No _____

ordering internal conflict Yes _____ No _____

Please describe: _____

10. Does the organization provide support to the executive to prevent/alleviate executive stress and burnout?

Yes _____ No _____

Please describe: _____

11. Does the organization have a succession plan in place for future executive leadership?

Yes _____ No _____

ANY "NO" ANSWERS INDICATE THAT THE ITEM NEEDS ATTENTION

EXTERNAL RELATIONS QUESTIONNAIRE (continued)

4. Do board members represent and communicate the organization's mission, goals, services and accomplishments to:

the public Yes _____ No _____

and to key external decision-makers including:

funders Yes _____ No _____

government Yes _____ No _____

the media Yes _____ No _____

5. Does the executive represent and communicate the organization's mission, goals, services and accomplishments to:

the public Yes _____ No _____

and to key external decision-makers including:

funders Yes _____ No _____

government Yes _____ No _____

the media Yes _____ No _____

6. Does the organization systematically monitor legislative and regulatory activity that has implications for the organization and/or its constituents/community?

Yes _____ No _____

7. Does the organization have a system for obtaining input/feedback from individuals and groups affected by its mission, activities, methods and results?

Yes _____ No _____

Please describe: _____

8. Does the organization have any staff dedicated to:

public education/outreach to
potential consumers/participants Yes _____ No _____

public relations Yes _____ No _____

EXTERNAL RELATIONS QUESTIONNAIRE (continued)

media relations and/or marketing Yes _____ No _____

If yes, how many full time? _____ Part time? _____

9. Does the organization engage directly, or through participation in alliances, in:

government relations activity Yes _____ No _____

Please describe: _____

public policy advocacy Yes _____ No _____

Please describe: _____

10. Has the organization made the election under Internal Revenue Code section 501(h) regarding the reporting of lobbying activities on Form 990?

Yes _____ No _____

11. Has the organization, within the past two years, engaged in a systematic analysis of potential strategic alliances with other organizations or groups that might enhance or strengthen the organization's work in fulfillment of its mission?

Yes _____ No _____

If yes, please describe and also indicate any actions taken as a result of that analysis: _____

(Any questions that were answered "no" indicate that the item should be given attention.)

ORGANIZATIONAL ASSESSMENT©

ADMINISTRATION AND MANAGEMENT / FINANCE QUESTIONNAIRE

To be completed separately by each of the following:

- Executive
- Chief Fiscal Officer
- Board Treasurer

1. Does the organization operate according to a written annual budget that is approved and monitored by the board and modified when necessary?

Yes _____ No _____

2. Does the organization undergo an annual independent audit conforming to requirements of the American Institute of Certified Public Accountants?

Yes _____ No _____

3. Does the organization have written financial management procedures covering such matters as:

expenditure control Yes _____ No _____

check signing and check writing
authority and signature control Yes _____ No _____

financial reports Yes _____ No _____

purchasing Yes _____ No _____

4. Does the organization have a financial management system with a clear audit trail of income and expenses?

Yes _____ No _____

5. Are required reports submitted to funding sources in a timely manner?

Yes _____ No _____

6. Does the bookkeeping system include all of the following:

general ledger Yes _____ No _____

books of original entry (journals) for

ADMINISTRATION AND MANAGEMENT / FINANCE QUESTIONNAIRE (continued)

11. Does the board of directors at each meeting receive a written financial report that includes:

statements of cash balance	Yes _____	No _____
current liabilities and accounts receivable	Yes _____	No _____
statement of total revenues and expenses	Yes _____	No _____
income and expenses broken down by program	Yes _____	No _____
year-to-date variances, with explanations of any variances	Yes _____	No _____

If no, what's missing? _____

12. Does the organization insure its board members against liability?

Yes _____ No _____

13. Does the organization bond all staff who handle funds?

Yes _____ No _____

(A "no" answer to any of these questions indicates the item should be given attention.)

ORGANIZATIONAL ASSESSMENT©

ADMINISTRATION AND MANAGEMENT / HUMAN RESOURCES QUESTIONNAIRE

To be completed separately by each of the following:

- Executive
- Staff member responsible for personnel
- Chair of the Board's Personnel Committee or, if there is not such a committee, the Board Chair

1. Does the organization follow a written set of personnel policies that have been approved by the board of directors?

Yes _____

No _____

2. Have the personnel policies been reviewed and updated by the administration in the past two years?

Yes _____

No _____

3. Have the organization's personnel policies (along with any job advertisements or announcements, application forms and interview questions, hiring letters or employment agreements that the organization uses) been reviewed in the past two years by an attorney who is an expert in employment law and revised according to the attorney's advice?

Yes _____

No _____

4. Is there a written job description for each staff position that includes minimum qualifications, responsibilities and salary range?

Yes _____

No _____

If yes, have these been reviewed and updated within the past year?

Yes _____

No _____

5. Does the organization conduct a formal performance appraisal of each staff member annually?

Yes _____

No _____

6. Is there a written equal opportunity and non-discrimination policy?

Yes _____

No _____

ADMINISTRATION AND MANAGEMENT / HUMAN RESOURCES QUESTIONNAIRE (continued)

7. Is there a written sexual harassment policy?

Yes _____

No _____

8. Are there written nepotism, conflict of interest and ethical guidelines for staff?

Yes _____

No _____

9. If any persons working for the organization are classified as independent contractors do they meet current IRS standards for that classification?

Yes _____

No _____

10. Are all non-exempt personnel paid time and a half for any hours worked over 40 in a given work week?

Yes _____

No _____

11. Does the organization encourage promotion from within?

Yes _____

No _____

Please describe: _____

12. Are job-related skills development and educational opportunities offered to staff?

Yes _____

No _____

Please describe: _____

13. Is there a table of organization that visually displays job positions and reporting relationships?

Yes _____

No _____

14. Does the organization participate in the New York State Unemployment Insurance System and purchase workers compensation and disability insurance for all employees?

Yes _____

No _____

ADMINISTRATION AND MANAGEMENT / HUMAN RESOURCES QUESTIONNAIRE (continued)

15. Do the personnel who are responsible for administering the organization's human resources receive ongoing training and updated information about all federal, state and local laws and regulations that pertain to the organization?

Yes _____ No _____

Please describe: _____

16. Are equal treatment and fully documented progressive discipline practiced in a standardized way prior to termination of any employee for cause (except in the case of extremely serious violations)?

Yes _____ No _____

17. Does the organization have a written annual staffing plan that relates to the program plan and budget

Yes _____ No _____

If yes, does the plan identify:

number of staff needed Yes _____ No _____

core and specialized competencies required Yes _____ No _____

the means of meeting those organizational needs Yes _____ No _____

18. Does the organization regularly review its staff compensation package in light of industry standards and the organization's staffing needs?

Yes _____ No _____

19. Is the organization able to attract and retain a sufficient number of qualified staff to meet the organization's goals?

Yes _____ No _____

20. Does the organization offer benefits and incentives to employees that:

apply the values implicit in its mission to staff as well as clients Yes _____ No _____

enhance its ability to attract and retain staff (for example, job sharing, flextime, flexible benefits, substantial leave time)? Yes _____ No _____

21. Does the organization keep (for at least six years) personnel records for each employee including identifying information, hours worked and compensation?

Yes _____ No _____

ADMINISTRATION AND MANAGEMENT / HUMAN RESOURCES QUESTIONNAIRE (continued)

22. Does the organization have a form I-9 Employee Eligibility Verification Form on file for each employee?

Yes _____

No _____

23. Are employee records kept confidential and in limited access cabinets?

Yes _____

No _____

*(Any questions that were answered "no" indicate that this item should be given attention.
Many, although not all, of these items have legal implications for organizations that could be serious.)*

ORGANIZATIONAL ASSESSMENT©

**ADMINISTRATION AND MANAGEMENT / PROGRAM PLANNING
AND EVALUATION QUESTIONNAIRE**

To be completed separately by each of the following:

- Executive
- Program Director
- head of the board's Program Committee
or, if there is not such a committee, the Board Chair

1. Does the organization have an annual program plan that corresponds to its strategic plan and budget?

Yes _____

No _____

2. Does the organization take steps to ensure that its current and planned programs correspond to the needs of its target population and/or community?

Yes _____

No _____

Please describe: _____

3. Does the organization consider its service delivery role and scope in the light of other similar or related services available in the community?

Yes _____

No _____

Please describe: _____

4. Does the organization ensure that it is applying the best practices of its field in designing and implementing programs?

Yes _____

No _____

Please describe: _____

**ADMINISTRATION AND MANAGEMENT / PROGRAM PLANNING
AND EVALUATION QUESTIONNAIRE (continued)**

5. Has the organization developed, and does it apply consistently, organization-wide performance standards across all programs?

Yes _____ No _____

6. Does the organization conduct ongoing systematic program monitoring and evaluation that includes measurement of outcomes?

Yes _____ No _____

Please describe: _____

7. Does the organization coordinate its service delivery with other organizations providing similar or related services?

Yes _____ No _____

8. Does the organization engage in any programmatic collaborations with other organizations?

Yes _____ No _____

Please describe: _____

(Any questions that were answered "no" indicate that the item should be given attention.)

ORGANIZATIONAL ASSESSMENT©

RESOURCE DEVELOPMENT QUESTIONNAIRE

To be completed separately by each of the following:

- Executive
- Development or Fiscal Officer
- Board Treasurer or Fundraising Committee Chair

1. Does the organization have a fund development plan in place?

Yes _____ No _____

If yes, who created the plan (board, executive, staff, consultant, other)? _____

Who is responsible for its implementation? _____

Has it been updated within the past year?

Yes _____ No _____

2. Does the organization have a diversified funding base so it is not overly dependent on one source or type of income?

Yes _____ No _____

Please list what percentage of the organization's income in the current fiscal year is derived from each of the following:

Individuals (special events, direct mail, membership, major donors, etc.)	_____ %
Foundations	_____ %
Government grants, contracts or fees	_____ %
Corporations or small businesses	_____ %
Fees for service	_____ %
Related earned income	_____ %
Unrelated earned income	_____ %

3. Does the organization have a contingency plan so that, if a particular source of funds is withdrawn or severely cut back, this would not imperil the organization's existence?

Yes _____ No _____

RESOURCE DEVELOPMENT QUESTIONNAIRE (continued)

The Long Island Center for Nonprofit Leadership at Adelphi University's School of Social Work

Phone: 516-877-4429 Email: linonprofit@adelphi.edu

Please explain: _____

4. Is fundraising for the organization a joint effort of board and staff?

Yes _____ No _____

How many paid staff work on fundraising full time? _____ Part time? _____

Does the board have an active fundraising committee?

Yes _____ No _____

5. Have staff and/or board members participated in training during the past year to increase their skills in fundraising?

Yes _____ No _____

6. Does the organization have sufficient income to meet expenses?

Yes _____ No _____

If the organization has experienced a deficit in any of the past five years, please describe. _____

7. Does the organization have a balance between unrestricted and restricted income?

Yes _____ No _____

Please indicate the organization's projected income for the current fiscal year and the past three years:

	<u>Restricted Income</u>	<u>Unrestricted Income</u>	<u>Total Income</u>	<u>Expense</u>
Current Year:	_____	_____	_____	_____
Last Year:	_____	_____	_____	_____
2 Years Ago:	_____	_____	_____	_____
3 Years Ago:	_____	_____	_____	_____

RESOURCE DEVELOPMENT QUESTIONNAIRE (continued)

8. Has the organization been able to maintain its staff and programs?

Yes _____ No _____

If it has been necessary to decrease staff and/or programs any time during the past five years due to lack of funding, please describe. _____

9. Does the organization take advantage of any of the following types of resources:

In-kind donations Yes _____ No _____

Interns Yes _____ No _____

Volunteers Yes _____ No _____

Pro-bono services Yes _____ No _____

Facilities or other resources shared with other organizations

Yes _____ No _____

Group purchasing Yes _____ No _____

Barter Yes _____ No _____

For each "yes," please describe. _____

10. Do board members play an active role in fundraising and in otherwise bringing material resources to the organization?

Yes _____ No _____

Please explain: _____

(A "no" answer to any of the above questions indicates the item should be given attention.)

ORGANIZATIONAL ASSESSMENT©

**ADMINISTRATION AND MANAGEMENT /
SPACE, FACILITIES, SYSTEMS, TECHNOLOGY QUESTIONNAIRE**

To be completed by:

- Executive

1. Does the organization keep detailed records of all leased property and equipment?

Yes _____ No _____

2. Is there a detailed record of all owned property, plant and equipment?

Yes _____ No _____

3. Is there a periodic physical inventory or inspection of property, plant and equipment?

Yes _____ No _____

4. Does the organization have a regular maintenance plan for any buildings and/or vehicles?

Yes _____ No _____

5. Does the organization have an annual space and facilities plan that relates to the program plan and budget and ensures that the organization will have adequate and appropriate space and facilities for its current and anticipated programs and administrative needs?

Yes _____ No _____

6. Has an energy audit been performed within the past 12 months at each facility where the organization pays utility costs?

Yes _____ No _____

7. Does the organization use information technology to support any of the following:

Basic office functions –
word processing, spreadsheets Yes _____ No _____

Fiscal management Yes _____ No _____

Fund development/donor tracking Yes _____ No _____

Internal communication, information sharing Yes _____ No _____

ADMINISTRATION AND MANAGEMENT /

The Long Island Center for Nonprofit Leadership at Adelphi University's School of Social Work
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SPACE, FACILITIES, SYSTEMS, TECHNOLOGY QUESTIONNAIRE (continued)

Research and information gathering Yes _____ No _____

Client tracking / service reporting Yes _____ No _____

Other: _____

8. Have computer software and hardware, telephone systems, etc. been considered for upgrading within the past two years?

Yes _____ No _____

Please describe: _____

9. Does the organization utilize:

e-mail Yes _____ No _____

If yes, please describe and indicate who the users are: _____

The Internet Yes _____ No _____

If yes, please describe and indicate who the users are: _____

10. Do staff receive training in the use of technology?

Yes _____ No _____

If yes, please describe: _____

11. Does the organization have a technology plan? Yes _____ No _____

If yes, is it:

related to the strategic plan and budget Yes _____ No _____

ADMINISTRATION AND MANAGEMENT /

SPACE, FACILITIES, SYSTEMS, TECHNOLOGY QUESTIONNAIRE (continued)

updated annually	Yes _____	No _____
dealing with programmatic, administrative, connectivity and staff training issues	Yes _____	No _____
setting forth the organization's technology needs and means for meeting those needs	Yes _____	No _____

(Any questions that were answered "no" indicate that this item should be given attention.)