Nonprofit Business: _____**Phone:** _____

Business Address: _____**Year the Org. Founded:** _____

Name of person completing form: _____**Title:** _____

Email:_____ **Website:**_____

Nonprofit Mission Statement_____

_____

Governance

How many directors are currently on your board? _____

☐Yes ☐No Does your organization have a conflict of interest disclosure form for directors?

    ☐Yes ☐No If yes, is it completed annually?

☐Yes ☐No Does your organization have a succession plan for CEO and high-level staffing positions?

☐Yes ☐No Does your organization use a matrix for board development to ensure the presence of board members with varying experiences, backgrounds, skills and cultures?

☐Yes ☐No Does your organization hold a board orientation for new board members?

☐Yes ☐No Does your board do annual self-assessments/review/personal evaluations of their effectiveness?

☐Yes ☐No Does your board have term limits for directors?

    ☐Yes ☐No If yes, is the board following the term limits for directors?

☐Yes ☐No Does your organization provide monthly education and communication to the board?

☐Yes ☐No Does your organization provide a Duties and Expectations form for its directors/officers?

☐Yes ☐No Does the Duties and Expectations form outline a financial obligation to your organization?

☐Yes ☐No Does the Duties and Expectations form outline a volunteer commitment?

☐Yes ☐No Does your organization's board conduct an annual review of the CEO/Executive Director?

☐Yes ☐No Does your organization develop and maintain performance measures to monitor outcomes?

☐Yes ☐No Does your organization/board conduct an annual strategic planning session?

Policies

Does your organization have the following? (Please check all that apply.)

☐ Conflict of interest policy
☐ Gift acceptance policy
☐ Investment policy
☐ Whistleblower policy
☐ Policies & Procedures manual
☐ Bylaws Reviewed Annually

☐ Solicitation & Contributions number
☐ Spending Policy for daily transactions
☐ Public Information policy
☐ Fund Development policy
☐ Brand Management policy
☐ Social Media policy

Human Resources

☐Yes ☐No Does your organization have written job descriptions for all employees?

☐Yes ☐No Does your organization conduct background checks on all prospective employees & volunteers?

☐Yes ☐No Does your organization have a written employee handbook?

☐Yes ☐No Does your organization keep personnel and independent contractor records?

☐Yes ☐No Does your organization offer benefits to full-time employees?

☐Yes ☐No Does your organization hold regular staff meetings?

Financial Management

☐Yes ☐No Does your organization have an employed bookkeeper/accountant on staff?

☐Yes ☐No Does your organization utilize a contracted accounting firm?

☐Yes ☐No Does your organization engage an independent CPA for an audit, annual review or compilation?

    ☐Yes ☐No If you answered yes above, is it grantor/lender required or based on board discretion?

☐Yes ☐No Does your organization have an internal audit review committee?

☐Yes ☐No Does your organization utilize internal controls as directed by management?

☐Yes ☐No Does your organization use software to track accounting transactions? (ex. Quickbooks)

☐Yes ☐No Does your board of directors review the organization's financials monthly?

☐Yes ☐No Does your organization have an investment committee?

☐Yes ☐No Is your organization up to date on Form 990 filing with the IRS? (ex. Postcard, EZ or full form)

☐Yes ☐No If your organization is not religious or educational, have you filed with the Florida Department of Agriculture regarding the Solicitation of Contributions guidelines?

☐Yes ☐No Does your organization publish your Form 990 on your website?

☐Yes ☐No Does your organization create an annual budget for operations?

☐Yes ☐No Does your organization create an annual budget for all programs?

☐Yes ☐No Does your organization have Unrelated Business Income?

Fundraising and Sustainability

☐Yes ☐No Does your organization substantiate all donations as dictated by the IRS?

☐Yes ☐No Does your organization utilize a Donor Management software system? (ex. eTapestry?)

☐Yes ☐No Does your organization have recurring sources of revenue for operations and programs?

☐Yes ☐No Does more than 50% of your funding come from individual donations?

☐Yes ☐No Does more than 50% of your funding come from a single source? (ex. Grant, foundation, govt.)

☐Yes ☐No Has your organization conducted a competitive assessment to identify how many other organizations provide similar services in your service area? (gap analysis, duplication of services,

unique selling points of value to funders, etc.?)

☐Yes ☐No Does your organization have a financial sustainability plan?

☐Yes ☐No Does your organization require its directors to participate in fundraising activities?

How many fundraising events does your organization conduct in one year? _____

☐Yes ☐No Does your organization have an annual campaign?

☐Yes ☐No Does your organization have annual earned income? (ex. Memberships, tuition)

☐Yes ☐No Does your organization offer planned giving options to donors?

☐Yes ☐No Has your organization ever received a major gift?

☐Yes ☐No Does your organization apply for grants? (if yes, select all that apply)

☐ Federal		☐ Public corporations
☐ State		☐ United Way of Marion County
☐ Private foundations		☐ Marion County Hospital District

How many grants does your organization apply for in a year? _____

How many grants does your organization receive in a year? _____

Communications

☐Yes ☐No Does your organization send regular internal communications to its employees & staff?

☐Yes ☐No Does your organization have a crisis communications plan?

☐Yes ☐No Does your organization have a staff member who manages communications?

☐Yes ☐No Does your organization produce a newsletter?

☐Yes ☐No Does your organization produce an annual report?

☐Yes ☐No Does your organization utilize social media? (Select all that apply)

☐ Facebook		☐ Instagram
☐ Twitter		☐ LinkedIn

☐Yes ☐No Does your organization utilize a photo release form for photography or video?

☐Yes ☐No Does your organization have a recognized brand in the community?

Technology

☐Yes ☐No Does your organization utilize off-site data storage for all records?

☐Yes ☐No Does your technology include security devices? (ex. Firewall or Spyware)

☐Yes ☐No Does your organization have a data recovery plan in case of crisis?

☐Yes ☐No Does your organization have a plan to update technology? (ex. Computers, printers, etc.)

Collaborations & More

☐Yes ☐No Does your organization collaborate with other nonprofits in the community?

☐Yes ☐No Is your organization open to collaboration on projects?

☐Yes ☐No Does your organization have a process for evaluating the impact of programs?

☐Yes ☐No Does your organization carry Directors & Officers insurance for your board?