The Non-Profit Organization Self-Evaluation Checklist Checklist

The checklist below is meant to provide a quick overview of the health of your major organizational systems. It does not produce an organizational evaluation and will not let you know if your services are effective or efficient. It will, however, let you know if you have the systems in place that are necessary to operate effectively and efficiently.



Board of Directors

- [ ] The Board of Directors is elected by a membership that represents the community that the organization serves.
- [ ] The Board of Directors is elected by a membership that represents the people who use or benefit from the programs and services of the organization.
- [ ] New Board members are given an information package on assuming their position that includes:1. " Board minutes from the previous two years ", 2. Financial statements from the previous two years ", 3. Annual and Auditor's Reports for the previous two years ", 4. A copy of the Constitution and By-Laws ", 5. An organization chart ", 6. Summaries of all programs/services ", 7. Copies of any program/service evaluations from the previous two years ", 8. A list of key staff and their positions ", 9. Brief biographies of all Board Members.
- [ ] New Board members are given an orientation to the organization within their first month on the Board.
- [ ] Board job descriptions covering all Board positions are provided to all Board members.
- [ ] The Board meets at least quarterly.
- [ ] Written agendas are sent out before meetings.
- [ ] Minutes are sent out shortly after Board meetings.
- [ ] The Board sets annual goals for its own work.
- [ ] The Board evaluates its performance annually.

- [ ] The Board evaluates the C.E.O. annually.
- [ ] The Board has a process for handling emergencies between meetings.

Policy Management

- [ ] The organization has a Values Statement that is reviewed regularly.
- [ ] The Mission Statement is reviewed by the Board at least every two years.
- [ ] The Constitution and By-Laws are reviewed by the Board at least every three years.
- [ ] In addition to the standard sections, the By-Laws have policies covering Board member conflict of interest, Board members who apply for jobs with the organization, Board member absenteeism, and Board member liability.
- [ ] The Board sets annual goals for the organization.
- [ ] The organization has a Strategic Plan that is reviewed regularly.
- [ ] Every program/service that the organization provides has a set of measurable objectives/outcomes that are approved by the Board or its delegate committee.
- [ ] The Board controls signing authority.

Financial Management

- [ ] The organization has a realistic annual budget and a plan for achieving it.
- [ ] Financial statements are presented to the Board at least quarterly.
- [ ] Financial statements provide comparative information for the previous year and for the current budget.
- [ ] The Board Treasurer is skilled at financial analysis.
- [ ] The organization has unrestricted operating reserves to cover a minimum of three months' operating costs.
- [ ] The cost of fund raising does not exceed 25% of funds raised.
- [ ] At least 75% of all expenses are directed to the Charitable Objects of the organization.
- [ ] The organization has an annual independent audit.

Risk Management

- [ ] Limits are put on over-spending without Board approval.
- [ ] All staff/volunteers who are in regular contact with vulnerable people or who are in a position of authority over vulnerable people are screened by police.
- [ ] The organization carries Directors and Officers liability insurance.
- [ ] The organization carries a minimum of $2 million liability insurance.
- [ ] The organization has, regularly educates its staff and volunteers on, and enforces policies on discrimination and harassment.
- [ ] The organization has, and enforces policies on, confidentiality where appropriate.

- [ ] The organization has policies on the use of office equipment.
- [ ] The organization makes all mandatory government filings and payments on time.
- [ ] Fund raising activities follow the ethical guidelines set out by the Canadian Society of Fund Raising Executives and/or the Canadian Centre for Philanthropy.
- [ ] Independent contractors meet all the requirements of the Canada Revenue and Customs Agency for independent contractors.

Human Resources Management

- [ ] Staff are hired on a competitive basis through a formal process.
- [ ] The organization has a written personnel policy.
- [ ] The personnel policy is provided to all staff.
- [ ] The organization has a written volunteer policy.
- [ ] The volunteer policy is provided to all volunteers.
- [ ] Every staff person and volunteer has an up-do-date job description.
- [ ] Staff/volunteers are provided with a comprehensive orientation to the organization within one week of arriving.
- [ ] Staff/volunteers are evaluated annually.
- [ ] Evaluations are growth oriented.
- [ ] Staff/volunteers are provided with opportunities to upgrade their skills.
- [ ] Staff/volunteers are provided opportunities for promotion and/or change in assignment.
- [ ] The organization recognizes staff and volunteer achievement.
- [ ] Administrative staff turnover is under 15% annually.
- [ ] Program staff turnover is under 15% annually.

Program/Service Delivery

- [ ] Programs/services are delivered to meet identified needs.
- [ ] Goals that cover output and outcome are set for every program/service.
- [ ] Individuals from all levels of the organization participate in planning processes.
- [ ] Service users are involved in program planning.
- [ ] Programs are physically accessible.
- [ ] Programs are linguistically accessible.
- [ ] Programs are provided by staff and volunteers with appropriate training and expertise.
- [ ] Eligible human service users are not denied service because of an inability to pay.
- [ ] The organization communicates regularly with its stakeholders.

Evaluation

- [ ] Every program/service is evaluated against its output and outcome goals annually.
- [ ] Program and administrative evaluations are compiled and published annually.
- [ ] The results of all evaluations are used in annual planning.
- [ ] Service users are involved in evaluations.

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