

Take Stock of Your Organization

All organizations are different, and have different issues and concerns. At Cause Effective, having helped hundreds of nonprofit executives assess their organizations, we have found the following questions to be most helpful. You can use this checklist on its own, or to help you work through the questions in the *Taking Stock Worksheet* (see page 1-4).

Consider the following topics when answering Big Questions One and Two on the Worksheet (or when you are assessing the present or past status of your organization).

Finances

Where does our money come from?

Source	Amount	% of Budget
<input type="checkbox"/> Foundations	_____	_____
<input type="checkbox"/> Corporations	_____	_____
<input type="checkbox"/> Government	_____	_____
<input type="checkbox"/> Local Businesses	_____	_____
<input type="checkbox"/> Individuals	_____	_____
<input type="checkbox"/> Other sources	_____	_____

How many individual donors are there and at what levels do they contribute?

How likely are the donors to continue contributing?

What is being done to seek new donors?

How is the money used? What are the largest expense categories?

What are the total net assets?

Human Resources

Board of Directors:

How many people are on the Board of directors? _____

Are all of them active in fundraising? _____

Do all of them make personal financial contributions?

Describe ways in which they are involved other than just coming to meetings (committees, special projects, etc.)

What skills and contacts are represented on your board?

- Lawyer
- Accountant
- Fundraising expertise
- Religious community
- Clients of your organization
- Contacts in business/banking
- Contacts in a particular business that is related to your organization
- Contacts in government
- Contacts at foundations
- Management expertise
- Facilities expertise

Staff

How many full-time and part-time staff are there?

How many are involved in fundraising/development?

How many are available to take on extra work planning and implementing an event? _____

Volunteers/Other Human Resources

Describe volunteers, advisors, clients, members, consultants and their role in the organization.

Other Resources

Describe any other resources available to the organization.

Resource Development History

How has the organization secured human and financial resources in the past?

- Direct mail
- One-to-one solicitations
- Corporate and foundation appeals
- Responding to government requests for proposals (RFPs)
- Special events
- Planned giving
- Other methods

Are there plans to change these strategies?

Objectives

Consider your answers to Questions One and Two and use the following categories to determine your Organizational Objectives in Question Three.

- Program objectives
- Development objectives
- Enlistment/Recruitment objectives
- Promotion/Marketing objectives
- Morale/Recognition objectives
- Administrative/Infrastructure objectives
- Other objectives