

Nonprofit Self-Evaluation Form

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| 1. | Our organization has 501©3 or other charitable tax status. | Yes | Pending | No |
| 2. | We have a sufficient number of members on our board of directors. # _____ | Yes | In process | No |
| 3. | We are registered with the state regulatory authority if required. | Yes | In process | No |
| 4. | Our staff members have appropriate qualifications. | Yes | Pending | No |
| 5. | We have an organizational strategic plan. | Yes | In process | No |
| 6. | We have mission and vision statements written and approved by the board. | Yes | In process | No |
| 7. | We have organizational and program cases for support. | Yes | In process | No |
| 8. | We comply with annual filing requirements under relevant state nonprofit corporation or other state and federal statutes for all states where we operate and fundraise. | Yes | In process | No |
| 9. | We hold regular board meetings and take minutes at those meetings. | Yes | In process | No |
| 10. | We have written employment policies. | Yes | In process | No |
| 11. | We share financial statements with our board and we have our financials audited by an independent firm each annually. | Yes | In process | No |
| 12. | Our CEO provides good management, is well respected in the community, and is involved with cultivation and solicitation of donors. | Yes | Some | No |
| 13. | Our board members receive orientation and director's handbooks. | Yes | Some | No |
| 14. | Our board is comprised of a good mix of diverse backgrounds; they have the skills and talents needed by our organization; they have influence and affluence; they contribute financially; and they understand their role. | Yes | Some | No |
| 15. | Our board committees have written guidelines and are active. | Yes | In process | No |
| 16. | We have board and staff members complete conflict of interest policies. | Yes | In process | No |
| 17. | We have an investment policy that is regularly reviewed by the board. | Yes | Some | No |
| 18. | We have systems designed to produce accounting checks and balances. | Yes | In process | No |
| 19. | We require multiple authorizations for money transfers above a specified amount. | Yes | In process | No |
| 20. | We have a document retention policy reviewed by a qualified attorney. | Yes | In process | No |
| 21. | We regularly review our insurance needs. | Yes | In process | No |
| 22. | We have developed measures that the board and contributors can use to assess whether the organization is achieving its mission. | Yes | In process | No |
| 23. | We acknowledge gifts within 72 hours. | Yes | Some | No |
| 24. | We have an effective website. | Yes | In process | No |
| 25. | We have a gift acceptance policy and procedure manual in place. | Yes | Usually | No |
| 26. | We have all the necessary office equipment we need. | Yes | Some | No |
| 27. | We publish and distribute an annual report including names of donors. | Yes | Some | No |
| 28. | We have volunteer training and provide a volunteer handbook. | Yes | Some | No |
| 29. | Our board and staff receive continuing education on a regular basis. | Yes | In process | No |
| 30. | We have a planned giving program in place. | Yes | In process | No |