

Public Works Nonprofit Tune-Up

The Public Works Nonprofit Tune-Up helps executives analyze organizational practices to find areas for improvement and opportunities to build organizational strength. After you complete the assessment, we will work with you to review strengths and challenges, and identify how and where to align operations and infrastructure with your goals. If you are considering updating your strategic plan or are in a time of organizational transition, our Tune-Up will help you gain a comprehensive view of current needs and prioritize actions to accomplish your goals.

Before you start the online Nonprofit Tune-Up, please review the questions below to help you prepare the materials required for the survey.

Category	Questions
Organizational Overview	<p style="text-align: center;">[Upload: Strategic Plan]</p> <ol style="list-style-type: none"> 1. Contact information for the person completing the assessment (Name, Role, Email Address, Phone Number) 2. What is the name of your organization? 3. What year was the organization founded? 4. Organization’s website – provide a link. 5. What is your organization’s mission statement? 6. Where do you provide services and programs? 7. Do you have a strategic plan in place? 8. Name three of your greatest organizational assets. Be as specific as possible (e.g. Board Members, Staff, Programs, Funders, Location, etc.) 9. Name three of your current organizational challenges. (e.g. Board Members, Staff, Programs, Funders, Location, etc.)

Category**Questions**

**Organizational
Structure &
Administration****[Upload: Organizational Chart]**

10. How many staff are currently in the organization?
 11. Were staff positions added in the last fiscal year?
 - a. If so, how many?
 12. How many staff have left the organization in the last:
 - a. One year
 - b. Three years
 13. Do you plan to add more staff to your organization?
 14. Do you currently pay for any contracted services or temporary workers?
 15. In your organization, do interns have project management duties? For example: Interns leading key-programmatic efforts, managing organizational finances or other integral organizational processes.
 16. Does your organization have a leadership and management succession plan?
 - a. If no, why?
 17. How frequently do the following formal meetings occur in your organization?
 - a. Organization-Wide Meetings
 - b. Division or Team Meetings
 - c. One-on-One Meetings (Supervisor to Staff or Peer to Peer)
 18. How do you communicate the organization's overall performance to staff? (check boxes)
 - a. Team Meetings
 - b. Internal Company Newsletter
 - c. Circulation of Internal Memo
 - d. Internal E-mail announcements
 - e. Central database
 - f. Other
 19. How are policy changes communicated within the organization?
 - a. Team meetings
 - b. Internal company newsletter
 - c. Circulation of internal memo
 - d. Internal e-mail announcements
 - e. Central database
 - f. Website
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Category	Questions
	<p>g. Other</p> <p>20. How often does your organization offer professional development opportunities for your staff?</p> <ul style="list-style-type: none"> a. Once a month b. Once a quarter c. Once every 6 months d. Once a year e. Less than once a year or never f. Other (please specify) <p>21. Does your organization have a formal system of accountability for staff? (performance targets, quotas, professional development goals)</p>
<p>Programs & Services</p>	<p style="text-align: center;">[Upload: Metrics and Programs Worksheet]</p> <p>22. Please select your organization’s areas of focus. (Check all that apply)</p> <p>23. What are the populations you serve? (Check all that apply)</p> <p>24. Beyond the metrics submitted in the ‘Metrics and Programs Portfolio’ worksheet, how else do you assess the performance of your programs?</p> <p>25. Is there a formalized process to share resources between different service areas within your organization?</p>
<p>Board & Governance</p>	<p>26. Number of active board members.</p> <p>27. How frequently does the board meet?</p> <p>28. Is your organization’s board organized into committees?</p> <p>29. Do board members have distinct roles and responsibilities?</p> <p>30. Does your board have a give/get benchmark for its members? Also: if so, do board members meet this requirement?</p> <p>31. Please rank your board’s performance in the following three categories:</p> <ul style="list-style-type: none"> a. Vision and Strategic Planning b. Resource and Financial Oversight c. Managing Organizational Performance d. Development e. Not Applicable <p>32. What are the top three priorities of the board this year?</p>

Category	Questions
	<p>33. What decisions are under the board’s jurisdiction versus the President/Executive Director?</p> <ul style="list-style-type: none"> a. Overall Strategy b. Financial Decisions c. Program Decisions d. Human Capital e. Expansion and Contraction <p>34. How often does the board review your organization’s finances?</p> <p>35. Does the board represent a diverse set of skills?</p> <p>36. Is the board representative of the population served by your organization’s mission?</p>
<p>Development & Marketing</p>	<p>37. Do you have staff and resources dedicated for fundraising and development?</p> <p>38. Do you have an established development strategy?</p> <p>39. How often do you meet or exceed your annual fundraising targets?</p> <p>40. Does your organization produce a yearly report detailing the organization’s performance and outcomes?</p> <p>41. What strategies and tools do you use to market your organization and its services?</p> <p>42. How often do you interact and share information, strategies, or best practices with the groups you interact with?</p> <ul style="list-style-type: none"> a. Local Elected Officials b. Government Agencies c. Local Nonprofits d. Civic Leaders and Groups e. Other <p>43. Does your organization have at least one fundraising event per year?</p> <p>44. Does your organization have any contractual or grant-defined partner organizations?</p>
<p>Budget & Finance</p>	<p>[Upload: Form 990, Financial Statements, Audited Financials]</p> <p>45. Do you have an endowment or a reserve fund?</p> <p>46. Do you have any budget allocations for capital investments/innovation?</p> <p>47. Please describe your financial goals for this fiscal year.</p>

Category	Questions
	<p>48. Are there specific types of funding you are looking to expand?</p> <p>49. Do you have a plan in place for covering new expenses in the event of organizational growth?</p> <p>50. What financial challenges is your organization experiencing?</p> <p>51. What processes do you have in place to manage your financial operations?</p> <p>52. What finances are reported to the board?</p> <p>53. Please describe your grant compliance process.</p>
<p>Looking Forward</p>	<p>54. Is your organization a member of any professional networks or coalitions in the sectors in which you operate?</p> <p>55. Are you aware of other nonprofits in the area? In the U.S.? that provide similar services?</p> <p>56. What are your organization's goals for the next year?</p> <p>57. Are you on track to reach your goals for next year?</p> <p>58. What resources might enable you to reach your goals for the next year?</p> <p>59. What are your organization's goals in three years?</p> <p>60. Are you on track to reach your goals in three years?</p> <p>61. What resources might enable you to reach your goals in three years?</p>