



List of Organizational Assessments Available Online

The tools listed on this form cover a wide range in both their level of complexity and the amount of time required to complete them. When choosing any organizational assessment tool, consider the resources it will take to conduct the assessment and to analyze the data.

Tool Name & Hyperlink	Brief Description
<p><i>Grantmakers for Effective Organizations Tool for Assessing Start-up Organizations</i></p> <p>http://www.lapiana.org/consulting/Start-Up_Assessment_Tool.pdf</p>	<p>This free toolkit will help start-up organizations anticipate and address questions and issues grantmakers might raise during their decision-making process on a funding request. Topics covered include:</p> <ul style="list-style-type: none"> • Governance/board of directors • Executive Director/leadership • Finances/financial management systems • Human resources/staffing, policies and procedures • Development/fundraising • Mission and message, communications to external audiences
<p><i>McKinsey Capacity Assessment Grid</i></p> <p>http://www.vppartners.org/learning/reports/capacity/assessment.pdf</p>	<p>The assessment grid can help an organization identify areas of strength and areas needing improvement, measure changes in capacity over time, and draw out different views within an organization regarding its capacity. Areas that are assessed include:</p> <ul style="list-style-type: none"> • Aspirations • Strategies • Organizational skills • Human resources • Systems and infrastructure • Organizational structure

Technical Assistance for Community Services (TACS) Nonprofit Organization Self Assessment Tool

http://www.tacs.org/qa/TACS_OrganizationSelfAssessment.pdf

This ten-page assessment tool uses a mix of yes/no questions and scale questions. The questions focus on the following topics:

- Fundraising strategies
- Financial condition
- Public and community relations
- Personnel management
- Financial management
- Planning and evaluation
- Governance

Capacity Benchmarking Tool for Faith and Community Based Organizations – Branch and Abt Associates

http://www.acf.hhs.gov/programs/ccf/resources/benchmarking_tool/cpct_toc.html

This tool is intended for newly-established and emerging community-based nonprofit organizations – including faith-based groups – that want to work toward greater stability and effectiveness. This tool addresses the following topics:

- Boards of directors
- Strategic planning and decision-making
- Program monitoring (monitoring effectiveness)
- Community linkages and partnerships
- Fundraising and grant writing
- Technology
- Managing staff and volunteers
- Financial management

Organizational Assessment Template adapted from the OAT- National Resource Center

http://www.ccfgrantees.org/Resource%20Library%20%20Documents/Organizational_Assessment_Template.doc

This template was adopted and adapted from the Organizational Assessment Tool (OAT) developed by NGO Manager. Part of the modification is to include a cross-reference to the SCORE categories (identified in the Change Management toolkit at www.ccfgrantees.org) so the organization can build on past successes and create even better future results. This tool addresses the following topics:

- Leadership and governance
- Management processes and procedures
- Resources
- Relationships
- Results

<p><i>Organizational Capacity Self Assessment Questionnaire</i></p> <p>http://www.ccfgrantees.org/Resource%20Library%20%20Documents/Organizational %20Capacity Self Assessment Questionnaire.doc</p>	<p>This three-page tool provides a general baseline for an organization’s capacity. The information gathered from this form can also be used to develop a customized assessment that will more thoroughly examine your organization’s capacity building needs. The tool addresses the following topics:</p> <ul style="list-style-type: none"> • Mission and programs • Governance • Evaluation and planning • Fiscal management • Legal • Human resources
<p><i>Point K Learning Center, Innovation Network</i></p> <p>http://www.innonet.org/index.php</p>	<p>The Point K Learning Center's free tools and resources (http://www.innonet.org/index.php?section_id=64&content_id=185) help nonprofits and funders:</p> <ul style="list-style-type: none"> • Develop their knowledge about evaluation, and knowledge about the results of their own programs. • The site also encourages visitors to collaborate and connect with peers.

This table contains two columns and eight rows. The first row is a header row, reading “Tool Name and Hyperlink,” and “Brief Description.” The first cell of each subsequent row contains the name of an online tool for organizational assessment, including “Grantmakers for Effective Organizations Tool for Assessing Start-up Organizations,” “McKinsey Capacity Assessment Grid,” “Technical Assistance for Community Services (TACS) Nonprofit Organization Self Assessment Tool,” “Capacity Benchmarking Tool for Faith and Community Based Organizations – Branch and Abt Associates,” “Organizational Assessment Template adapted from the OAT- National Resource Center,” “Organizational Capacity Self Assessment Questionnaire” and “Point K Learning Center, Innovation Network.” The remaining cells contain descriptions of the various tools.