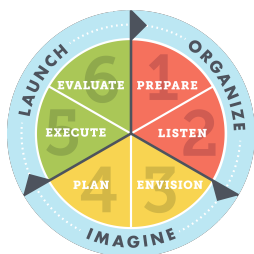


Resources for Organizational Assessment and Financial Analysis



Organizational Assessment

Strategic planning can be a great time to review your organization's strengths and weaknesses. This can take the form of a discussion or SWOT analysis, or you may decide to review your organization in a more formal, rigorous way to ensure you are healthy across a number of different domains. Collecting this information will help you set appropriate goals to strengthen the organization during your planning process.

One simple way to take your nonprofit's temperature is the Nonprofit Health Check-up created by Washington Nonprofits and available in the SPiN toolkit under the Listen phase. This check list will help you ensure that you are meeting basic expectations for sound nonprofit management.

A more detailed, ambitious approach to organizational assessment is to complete [Social Venture Partners' Organizational Capacity Assessment Tool](#).^{*} This tool allows a team of people to self-assess the capacity of their nonprofit in areas such as strategy & planning, board leadership, financial management, marketing & communications and more.

Financial Analysis

It is important for your organization's leadership to have a sense of how well managed and stable your organization is. It is also critical for your leadership to have a good understanding of the organization's financial position and funding model. In other words, how financially healthy are you, and where do your revenues come from?

If you know this is an area of need, consider purchasing the book *Nonprofit Strategy Revolution* by David La Piana and completing the finance-related worksheets provided.

^{*}<http://socialventurepartners.s3-us-west-2.amazonaws.com/www.socialventurepartners.org/sites/54/2013/06/Organizational-Capacity-Assessment-Tool-OCAT.pdf>

