



These questions are provided to help you think about the right questions to ask about your organization's sustained ability to deliver mission results. Not all sample questions will apply to your organization, and some areas that are important to your organization may not be included in these samples. Please use these questions as the starting point for your discussion. Feel free to change them as best fits your organization.

Board

- What proportion of the board regularly attends meetings? Do you ever have problems attaining a quorum?
- Are board meetings more often focused around listening or around discussion?
- Do we have the right constituencies represented?
- Does our board contain diverse perspectives?
- Is our board well-networked into our community?
- Do board members understand the organization's finances? Are the finances actively discussed?
- Does the board have committees? Are these active? Are their roles defined and understood?
- What percentage of the board provides a personal financial donation to your organization?

CEO / Executive Director

- Is the current CEO an effective leader? (Consider board and staff perspectives.) Has the CEO consistently met his or her goals?
- Does the CEO motivate community members outside the organization?
- Is the CEO visible and relevant in your community?
- Is the CEO overwhelmed by work?
- Does the CEO delegate effectively and hold people accountable?
- Has the CEO fostered a productive, cohesive work environment?
- Is CEO's compensation package competitive at market rates?
- Can the CEO take a vacation without checking in?
- When was the last time the board reviewed the CEO?
- Does the CEO consistently provide an appropriate level of information so that the board is always aware of the critical issues at your organization?
- Is the CEO the primary keeper of "corporate" information or can it be easily accessed by those with authority to do so? (e.g. past minutes, the name of your insurance broker, you IRS letter)

Leadership Team & Staff

- Are all positions filled? Are turnover levels acceptable or problematic?
- Have staff members received the training they need?
- Is there a general feeling that the staff works and identifies as a team?
- Are performance reviews conducted regularly?
- How is decision making spread across the leadership team?
- Do team members have an opportunity to work in areas other than their expertise? (To gain broader experience; e.g. programs v. finance v. fund development v. volunteer recruitment & coordination)
- Has most of the leadership team come up through the organization or been hired from outside?
- Are compensation packages competitive at market rates?

Volunteers

- Do you have the level of volunteers that you would like in your organization?
- What is your retention rate for volunteers?
- Are volunteers trained? Does someone oversee their work?
- Are all volunteers background checked?

Financial Management

- Are financial reports reviewed on a regular basis? If not, where is the delay? How can it be fixed? Are they shared with the board and staff leadership team?
- Are there financial controls so that transactions are seen by multiple people?
- Are budgets in place for program staff? Is their fiscal performance monitored against their budgets? Did staff participate in the development of their budgets?
- Where are the financial risks for the organization? Is it ever hard to make payroll or cover rent? Are restricted funds kept separately from unrestricted funds? Is there debt? If so, is there a plan to pay it down?
- Are there capital and operational reserves?
- Does the board ever had the opportunity to look at financial trends over multiple years?

Revenue

- What is your percentage revenue mix by funder? Is this the mix you want?
- What is your percentage of unrestricted revenue?
- Are there any funding sources that are at risk?
- If you were to lose your single largest funder, what are the implications?
- If your organization holds fund raising events, what is the net income from these events? What's the fully-loaded net income including staff time?
- If you are reliant on fund raising or events, when did you most recently analyze your competition in this area?

Program Development/Evaluation

- Do all services and programs help deliver the organization's mission?
- Is there effective oversight of program staff and outcomes?
- Are program outcomes measured?
- Can you identify unduplicated people and duplicated services for each program? For your full organization?
- When was the last time you looked at the percentage mix of services provided? Is it in the right proportion to deliver your mission?
- When was the last time you looked at multi-year trends in service levels?
- Do the demographics by service provided yield any useful information? Do sub-groups within the population you serve have unique needs?
- Have you ever discontinued a program due to lack of effective performance?

Partnership & Collaboration

- Does or has the organization considered offering services through a partner?
- If you have any partnerships, how formal is the agreement? (hand shake to contract)
- When there is a need that you know your clients have, when would you seek a partner to fill the need? When would you consider an expansion of your own services to fill the need?

Facilities (& Mobile Services)

- What are the challenges with facilities? Is a plan in place to overcome these?
- Is preventative maintenance being done or is all facilities work reactive only to a crisis?
- Are facilities used well – not too crowded, not too much unused space?
- Are facilities well-matched to their use (e.g. tutoring is not held in the gym)?
- Are you located in the “right” place? Can the people you serve get to you?
- Is your working space inspiring? Is it a physical space in which you want to spend time?

Information Technology

- Have you ever done a technology audit to see what you have, what works, what you can get rid of or need to add?
- Are your in office IT services adequate? (phones, network, internet access, etc.)
- Are your mobile IT services and hardware adequate? (mobile devices, service plans, etc.)
- If mobile service is used, do you have a bring your own device policy?
- How often is your data backed up? Is it manual or automatic? On or off site?
- How secure is your data? (digital and hard copy)

Community & Public Relations

- Do you have an outreach plan?
- Have you identified the specific groups of people you'd like to reach? Do you know the best way to reach each group?
- Is your website and social media presence useful to your mission? (is seen, attracts people, etc.)
- Is your organization strongly linked to a specific person in the public's mind?
- Do you feel your web and social media work is accomplished according to a plan or is more haphazard?
- Is outreach coordinated with fund raising efforts?
- Do you have staff and volunteer policies around social media use referring to your organization?

Security & Safety

- Are people in your facilities safe and secure at all times?
- Are your assets safe?
- Do you have liability insurance? Vehicle insurance?
- Do you have D&O insurance?
- If you have jobs with specific risk (e.g. driver, fork lift), do you have certification requirements for staff? For volunteers?