

Here's an example:

		Least like us			Most like us	
		1	2	3	4	5
A. Governance						
A1	1. We are in the process of writing our first set of articles of incorporation or bylaws for our new organization.					1
	2. We do not yet have an "official, duly elected" board of directors.					1
	3. We do not have our first <i>written</i> strategic plan with measurable objectives and action steps for the organization.					1
					Total A1	3
A2	4. Our organization has adopted its first set of articles of incorporation and bylaws.					3
	5. Most, if not all, of the current board members knew each other before joining the board and many agreed to serve on the board because they were personal friends of the founder or founders.					3
	6. Our board sees itself as more of a "hands-on working board" rather than a "hands-off policy board."					3
					Total A2	9
A3	7. The board of directors is about evenly split between those who joined the board at the personal request of the founders of the organization and those who joined after the board began a formal recruitment and nominating process for new board members.					1
	8. The organization recruits board members as much for their expertise and experience as for their passion for the organization's work.					3
	9. The organization is still primarily <i>reacting</i> to external forces more than planning how the organization will take advantage of external forces "on the horizon."					2
					Total A3	6
A4	10. Our organization needs to complete or has recently completed its first comprehensive strategic planning process.					2
	11. The current composition of the board makes it easier than before to raise questions about our purpose and mission, establish written governance policies, and begin to set a strategic direction.					4
	12. The executive director and the board have a pretty clear sense of the division of roles and responsibilities for the governance and daily operation of the organization.					1
					Total A4	7
A5	13. Our organization has conducted several formal strategic planning processes since the founding of the organization.					4
	14. The executive director and the board of directors have a written document that describes the division of roles and responsibilities for the governance and daily operations of the organization.					3
	15. Our organization could use a sense of renewal, re-energizing, and refocusing.					4
					Total A5	11
					Highest group total	A5
					Group totals within one point of highest, if any	None

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B. Staff Leadership						
B1	1. We are not seeing a need at this time for a paid executive director.					
	2. Board members tend to be the contact persons for the organization.					
	3. The vision and concept for the organization resides more in the minds of the founders than anywhere else.					
Total B1						
B2	4. Our leader is more visionary and entrepreneurial than operational.					
	5. Our leader makes all the decisions for the organization.					
	6. Our leader prefers to act with minimal participation from the board, staff, or volunteers.					
Total B2						
B3	7. The organization has a full-time paid executive director.					
	8. The executive director makes most but not all the decisions and involves the staff and board in some of the decisions.					
	9. The organization needs the executive director to begin separating their time between the daily operations of the organization and meeting with potential funders, community leaders, and other nonprofit executive directors.					
Total B3						
B4	10. Our executive director is ready and able to lead the organization in expanding its mission and program offerings to meet the needs of the community.					
	11. The addition of program managers strengthens the organization and has not hindered timely decision making or staff flexibility.					
	12. The executive director consciously divides her or his time between tending to the internal operations of the organization and the external relationships with the community, funders, and other executive directors.					
Total B4						
B5	13. Our organization has an executive director who is decisive and able to work collaboratively.					
	14. Our organization has an executive director who understands non-profit finances and organizational development concepts.					
	15. Our organization's founder is long gone from the organization.					
Total B5						
Highest group total						
Group totals within one point of highest, if any						

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C. Financing						
C1	1. Our revenue is primarily donations from individuals. Little if any of the revenue is derived from foundations or corporations or contracts with other nonprofit or public sector organizations.					
	2. We are discussing the feasibility of writing grants or negotiating contracts for additional revenue.					
	3. We need to write our first one-year budget. Revenue and expenses are based more on projections than historical financial data.					
Total C1						
C2	4. Our organization has yet to develop a written plan for financing the work of the organization.					
	5. Our organization's current sources of funding are sufficient for the work we are doing.					
	6. Our organization is in the process of preparing its first grant application for operational support.					
Total C2						
C3	7. Our organization has a fundraising plan, not necessarily written, which generally targets specific funding sources rather than using a "shotgun" approach to fundraising.					
	8. Our organization can produce all the financial documents that could be required by a funding source (for example multi-year budget, balance sheet, audit, cash flow analysis).					
	9. The executive director, staff, and volunteers are discussing additional services and programs which would produce more revenue for the organization.					
Total C3						
C4	10. Our organization has funding which is a combination of income sources, namely earned income, donated income, contracted income, and investment income rather than being dependent on one or two sources of income.					
	11. Our organization has a steady cash flow, adequate accounting systems, and an operational budget.					
	12. As an organization, we are exploring new and expanded revenue sources to supplement our core funding. We have or are about to hire or contract fundraising staff.					
Total C4						
C5	13. Our organization needs to develop and sustain new financing sources.					
	14. Our organization needs to diversify its funding base to include several different sources of funds, such as public, private, fees, contracts, donations, foundations, and endowments.					
	15. Our organization has established or is planning to establish investment policies, planned giving, and endowments.					
Total C5						
Highest group total						
Group totals within one point of highest, if any						

Least like us Most like us
 1 2 3 4 5

D. Administrative Systems		
D1	1. There is not a need for office space at this point in time.	
	2. There is not a need for the organization to have a written policy and procedure manual at this point in time.	
	3. Setting up payroll, accounting, and human resources functions are the least of our concerns at this time.	
Total D1		
D2	4. Administrative duties are the responsibility of board members, volunteers, and any paid staff.	
	5. Our organization tends to follow mostly what is written in state and federal law because we have not written our own policy and procedure manual.	
	6. Our organization uses a volunteer or fiscal agent to manage all of our finances.	
Total D2		
D3	7. Our organization will gain greater credibility and stability with our own office space.	
	8. Our organization has hired a staff person (or plans to hire a staff person) whose primary duty is to manage the office.	
	9. Our organization has grown large enough that it is time to hire a business manager and manage our own finances rather than pay a fiscal agent.	
Total D3		
D4	10. The organization has an automated record system that keeps track of people using our services.	
	11. Our organization is considering expansion of leased space or purchase of office space.	
	12. The organization has and generally uses personnel policies, salary schedules, annual performance reviews, and formal job descriptions.	
Total D4		
D5	13. It is time to begin revamping and updating our administrative systems.	
	14. The organization has departments and those departments can make administrative decisions that fall within the approved policies and procedures of the organization.	
	15. Our organization is experiencing tension about the degree of centralization or decentralization needed in the organization.	
Total D5		
Highest group total		
Group totals within one point of highest, if any		

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E. Staffing						
E1	1. We have few if any written job descriptions.					
	2. The organization has no paid staff. Volunteers do all the work of the organization.					
	3. The organization does not have clearly identified supervisory and reporting relationships among the volunteers.					
Total E1						
E2	4. Our organization is run predominantly by volunteers, but we still have paid part-time staff.					
	5. Our organization is thinking about what we will eventually need in order for paid and unpaid staff to run our programs.					
	6. Our organization generally relies on in-kind donations of specialized advice, such as legal, program, or financial.					
Total E2						
E3	7. Our organization has approximately an equal number of volunteers and paid staff doing the work of the organization.					
	8. As an organization, we believe that too many policies and procedures will interfere with meeting community needs.					
	9. Our organization is finding a greater need for staff with skills specific to our program needs rather than just generalists or all-purpose staff.					
Total E3						
E4	10. Our organization's staff is growing more specialized in its functions and expertise and this is a positive development.					
	11. Our organization's management and staff tend to operate using cross-functional, results-oriented work teams that make most of the decisions affecting their work.					
	12. Our organization is experiencing a mix of old and new staff plus a diversity of staff including race, culture, gender, age, and graduate degrees.					
Total E4						
E5	13. Our organization is going through a period of high staff turnover and low employee morale.					
	14. Our organization has found a comfortable balance between providing service exclusively and providing service through joint or collaborative ventures.					
	15. Our organization has high-performing, interdependent, and self-sufficient work teams.					
Total E5						
Highest group total						
Group totals within one point of highest, if any						

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F. Products and Services						
F1	1. We still are not sure what products or services our organization would offer on an ongoing basis.					
	2. We are in the process of assessing the community needs relative to the mission of our organization.					
	3. We are generating lots of ideas for what kind of products and services we could or should provide.					
Total F1						
F2	4. Our organization is moving from talking about products and services to actually offering them.					
	5. Although the organization has plans and ideas for more products and services, our resources limit us to smaller activities for the moment.					
	6. Our organization thinks our products and services will do well and meet a need, but we lack the evaluation systems to know if we are doing well.					
Total F2						
F3	7. Our organization has to make decisions about whether or not to develop activities that have a high potential for funding but are not entirely consistent with the mission of the organization.					
	8. We would like to add additional products and services but lack the staff and space to do so.					
	9. Our organization is refining and improving our current products and services before adding new ones.					
Total F3						
F4	10. The organization's products and services are well designed and operated.					
	11. The organization's success and visibility has led to opportunities to branch off in a variety of directions.					
	12. The organization has a routine, formal evaluation process for all its programs and activities. The organization will use the information to enhance, maintain, or end programs within the organization.					
Total F4						
F5	13. Our organization has a schedule for conducting evaluation of products and services.					
	14. Our organization has 30 to 60 percent joint programs with other nonprofit or for-profit organizations.					
	15. Our organization's products and services need to be redesigned to meet emerging client needs.					
Total F5						
Highest group total						
Group totals within one point of highest, if any						

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G. Marketing						
G1	1. Very few people or organizations know we exist.					
	2. We are still debating who or what is the market for our services.					
	3. Although we think about it, a brochure is a future action item.					
					Total G1	
G2	4. We market ourselves primarily by word of mouth.					
	5. We are too busy with other organizational responsibilities to put time toward a marketing campaign.					
	6. We print our brochures, announcements, handouts, and other marketing materials using forms and examples found in our computer programs. We are not paying a consultant to produce brochures, announcements, or handouts.					
					Total G2	
G3	7. Our promotional goals are adequately met with a simple black-and-white fact sheet or brochure.					
	8. While we would like a comprehensive marketing campaign (brochures, flyers, annual reports, web site, advertising), we don't have the funds to pay for it.					
	9. We need to refine our image and identify our target audiences for our services.					
					Total G3	
G4	10. The organization's marketing materials have a consistent design and convey consistent key messages to promote instant recognition.					
	11. Our organization routinely produces and distributes annual reports and newsletters.					
	12. The organization needs a marketing plan to publicize its products and services.					
					Total G4	
G5	13. Our organization's message and marketing plan are not in tune with today's market and the needs of people.					
	14. Our marketing approach must change to reflect our changed mission or programming niche.					
	15. Our organization has the necessary resources—such as money, staff time, volunteers, experience—to support changes in the marketing plan.					
					Total G5	
					Highest group total	
					Group totals within one point of highest, if any	