

# **Organizational Health Self-Assessment Tool**



**Preamble**

It’s a healthy practice for board members to assess the quality of their own board operations. Many times, board members “don’t know what they don’t know” about their own board or organization.

Completing an assessment tool allows a board member to check on how well it is carrying out key responsibilities. It gives board members a chance to also step back and ask, “How are we doing as a board?” and, “How can we improve on the way we operate?” Boards that assess themselves can better identify areas in which they are performing well, areas for improvement and areas of concern. All this adds up to a better understanding of the organization’s health and making a greater difference for the people they serve.

Organizational health can include the following areas:

- Strategic Direction;
- Board Governance;
- Finances and Funding;
- Programs, Services and Events;
- Spaces/Facility;
- Human Resources and;
- Public Relations.

It takes approximately five minutes to complete a section. An online version of this tool can be made available from your City Liaison.

It is recommended that the assessment tool, or a section of the assessment tool, be completed or reviewed once a year by your board of directors. It is best if all board members participate in this process whether through group discussion or completing a copy of the tool on their own.

Effective board members have learned that it's critical to regularly conduct evaluations then work on key priorities identified through the year. Discussing assessment results can encourage more cohesion and clarity among board members by strengthening communications among them. Additional benefits include: improved understanding of what it means to be an effective board; agreement on board roles and responsibilities; and, members' renewed dedication to the board.

Your City of Calgary Liaison is available to support your organization in completing this tool. They can also provide tools and resources for your targeted areas of improvement or areas of concern. It is recommended that you share your self-assessment results with your City of Calgary Liaison so that he/she may assist you in developing a plan to address your improvement areas.

***Using a self-assessment tool can be beneficial and transformational for a board.***



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- Inform your City liaison so meaningful consultative services, support and resources can be provided to your organization;
- Providing information on trends in the sector and areas for service delivery improvements by The City and;
- Reporting to Calgary City Council, Councillors and The City’s Audit Committee.

I \_\_\_\_\_ have the authority to release this organizational information on behalf of \_\_\_\_\_  

(Print name) (Organization name)

  
to The City of Calgary for the purposes identified in this form.  
  
Signature: \_\_\_\_\_ Date: \_\_\_\_\_  

(digital signature instructions can be found [here](#))

  
Name of City Liaison: \_\_\_\_\_

Personal information, requested on this form is collected under the authority of Section 33 (c) of the Alberta Freedom of Information and Protection of Privacy (FOIP) Act. It will be used for the purposes set out in this form. Should you have any questions about this collection please contact your City Liaison or 311.

## Instructions

1. Please review each statement carefully. Using the following scale, indicate the degree to which your organization has the leading practice in place by selecting one option only:
  - **Just Beginning:** no work has been done on this topic or area
  - **Working On It:** some work has been started on this topic or area
  - **Done:** this topic or area is well addressed with written information, policies, plans, procedures or actions
2. To move to one specific section of the self-assessment tool, select the section on the table of contents with your cursor then hold CTRL and click. You will be moved to that section in the document.
3. Meanings or explanations for the words coloured in [blue](#) have been provided at the end of the document (Glossary).
4. There is a comments section that can be used to expand on or explain your ratings.
5. Directions on how to add up your scores:
  - a. For each individual topic area, add the numbers up and record the total for each column at the bottom of the chart. Values recorded should be 1 (Just Beginning), 2 (Working On It), or 3 (Done).
  - b. Add the total for each column together to give you one overall number for the topic area and record that number in the matching box (Let's Get Started, Making Progress, Good Job, and Excellent).
  - c. For an overall rating on your organization's health, add up all topic area totals together to give you one overall number and record that in the matching box (Let's Get Started, Making Progress, Good Job, Excellent) on the ["How are you doing?"](#) page
6. Definitions for Let's Get Started, Making Progress, Good Job, Excellent
  - a. **Let's Get Started:** there are many healthy practices that your organization can implement to improve your organization's overall health.
  - b. **Making Progress:** your organization has started to implement healthy practices but there are more than half of the recommended practices for you to consider to improve your organization's overall health.
  - c. **Good Job:** your organization has implemented more than half of the recommended healthy practices and is addressing common issues facing non-profit organizations.
  - d. **Excellent:** your organization has implemented most or all of the recommended healthy practices, planning for the organization's healthy and monitoring its progress.
7. Please share a copy of the completed form with your City Liaison for their information and records.



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Strategic Direction		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Mission, vision and values</b>					
1.	The group has a <a href="#">mission</a> , <a href="#">vision</a> and <a href="#">values</a> statements that are reflected in its programs and activities				
2.	The group has a shared understanding of the group's mission, vision and values				
3.	The group regularly reviews and updates its mission, vision, and values				
<b>Planning</b>					
4.	The group looks at their strengths, weaknesses, gaps and risks when planning.				
5.	The group considers what programs, services and events are offered in their community and region when planning.				
6.	The group includes other people in their planning activities such as volunteers, members, <a href="#">staff</a> , other neighbourhood people and businesses.				
7.	The group sets and approves <a href="#">realistic priorities</a> and <a href="#">measurable goals</a> for the organization in the <a href="#">strategic plan</a> .				
8.	The group's strategic plan is <a href="#">responsive</a> and <a href="#">reflective</a> of their community's needs.				
9.	The group approves a strategic plan every year after developing, reviewing or updating.				
10.	The group reviews and approves an annual <a href="#">business plan</a> which builds out the details of the goals and priorities from the strategic plan.				
<b>Decision Making</b>					
11.	The group uses their strategic plan, goals and priorities when making decisions and checks that the organization is guided by its mission.				
12.	The group uses their business plan when making decisions about when and where to make changes to staff, money, supplies, etc.				
<b>Total Score for Strategic Direction:</b>					
	Let's get started (12 - 18)		Making progress (19 - 24)		Good job (25 - 30)
					Excellent (31 - 36)



Board Governance		Just Beginning (1)	Working On It (2)	Done (3)	Comments
Participation					
1.	The Board of Directors take responsibility primarily for:				
a.	<i>goal setting</i>				
b.	<i>approving <a href="#">policy</a></i>				
c.	<i><a href="#">funding strategies</a></i>				
d.	<i><a href="#">financial and legal oversight</a></i>				
e.	<i><a href="#">evaluation</a></i>				
2.	The group understands the difference between board <a href="#">governance</a> decisions or actions (only the board makes these decisions) and <a href="#">management</a> or <a href="#">implementation</a> decisions or actions that can be <a href="#">delegated</a> to volunteers, committees, or staff				
3.	The group has valid <a href="#">Director and Officer Liability Insurance</a>				
4.	All board members receive meeting agendas, minutes and written reports in advance of meetings and come prepared to actively participate in discussions and activities.				
5.	The group has an approved, written process to handling <a href="#">urgent matters</a> between meetings (i.e. phone, email, emergency meetings, etc.).				
6.	All board members speak with " <a href="#">one voice</a> " and support the decisions made by the board once voted on.				
7.	The group regularly reviews possible areas of <a href="#">risk</a> and creates plans to reduce any risk to the organization.				
Succession Planning (recruitment, retention and recognition)					
8.	The group reflects the skills and <a href="#">diversity</a> needed to be effective and stay informed on changing needs and trends.				
9.	The group has enough board members to accomplish the needed work.				
10.	The group identifies needed skills and experience for the Board of Directors and committees every year to support strategic plan and priorities.				
11.	The group actively recruits for upcoming positions that will be vacant or needed skills and experience ( <a href="#">Recruitment Plan</a> ).				



Board Governance		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Governing Documents</b>					
12.	All board members have access to key documents and records (print or electronic).				
13.	The group reviews their <a href="#">bylaws</a> for changes regularly (i.e. no less than every three years).				
14.	All board members sign a document confirming they understand and agree to follow the organization's policy and procedure on:				
a.	<a href="#">Conflict of Interest</a>				
b.	<a href="#">Code of Conduct</a>				
c.	<a href="#">Confidentiality</a>				
<b>Policies and Procedures</b>					
15.	The group approves and reviews written <a href="#">governance policies and procedures</a> . (See "Recommended Policies and Procedures" section for examples.)				
<b>Total Score for Board Governance:</b>					

Let's get started (21 – 31)
  Making progress (32 - 42)
  Good job (43 – 53)
  Excellent (54 - 63)

Finances and Funding		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Budget</b>					
1.	The group reviews and approves a yearly <a href="#">budget</a> that includes all programs and management costs, building and construction costs and all sources of money.				
2.	The group builds a <a href="#">projected</a> long term budget that is longer than one year and is tied to their strategic plan, goals and priorities.				
<b>Funding</b>					
3.	The group has enough money from different sources to cover all costs, <a href="#">investments</a> and needed savings.				
4.	The group has money saved to use for unplanned opportunities or emergencies.				
5.	The group has a written <a href="#">action plan</a> to follow that identifies how the organization will bring in money from different sources and how successful their efforts were.				
6.	The group is aware of and tracks grants that they can apply for, including understanding the full <a href="#">scope</a> of grant requirements and possible additional costs or processes needed for the project or program.				
7.	The group has an approved decision-making process when choosing what grants to apply for and how the money will be used (specific projects, programs, etc.).				
8.	The group applies for and tracks grants they can to support their strategic plan, goals and priorities.				
9.	The group has assigned a knowledgeable staff, volunteer or board member to make sure all grant reports and applications are completed.				
<b><u>Cash Flow</u></b>					
10.	The group has had money in their bank accounts at the end of the year for the last two years consecutively.				
11.	The group compares the actual operating <a href="#">revenue</a> and <a href="#">expenses</a> to the approved budget.				
12.	The group has enough money to continue <a href="#">operating</a> for at least 60 days.				
13.	The group reviews all agreements and contracts yearly.				
14.	All money is <a href="#">reconciled</a> monthly.				

Finances and Funding		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Policies and Procedures</b>					
15.	The group approves and reviews written <a href="#">financial policies and procedures</a> for: (See “Recommended Policies and Procedures” section for more examples.)				
a.	<i>money handling for volunteers and staff</i>				
b.	<i>spending limits for staff and volunteers</i>				
c.	<a href="#">authorized cheque signers</a> (more than two people that can sign cheques and are not related, update information with bank, no pre-signed cheques, etc.)				
<b>Financial Statements</b>					
16.	The group follows <a href="#">generally accepted accounting best practices</a> .				
17.	The group uses a computer software program for <a href="#">bookkeeping</a> and financial reporting.				
18.	The group makes sure that the people who are doing the bookkeeping and <a href="#">financial reporting</a> have the right skills and experience (i.e. Treasurer, Bookkeeper, etc.).				
19.	The group reviews, monitors and approves monthly financial reports.				
20.	The group makes sure the monthly financial reporting is clear, transparent and easily understood by all.				
21.	The group uses the monthly financial reports and budget comparisons to make necessary changes in their financial plans.				
22.	The group uses a <a href="#">professional third-party service</a> to complete their annual financial <a href="#">audit</a> which includes a letter of recommendations.				
23.	The group approves the audited financial statements and <a href="#">implements</a> the recommendations from the professional third-party service.				
<b>Total Score for Finances and Funding:</b>					

Let's get started (25 – 37)

Making progress (38 - 50)

Good job (51 – 63)

Excellent (64 - 75)

Programs, Services and Events		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Planning</b>					
1.	The group's programs, services and events meet the needs and interests of its community.				
2.	The group's programs, services and events are inspired by their mission and are realistic based on their <a href="#">capacity</a> (Business Plan).				
3.	The group works to understand why people come to their programs, services and events, gathers feedback, tracks attendance and uses this information when planning for the future.				
4.	The group considers <a href="#">barriers</a> people may have when planning programs, services and events (i.e. cultural, financial, accessibility, transportation, time, child care, etc.).				
5.	The group plans programs, services and events in advance to:				
a.	<i>meet all regulations including City of Calgary bylaws, health and safety codes, special event requirements, etc.</i>				
b.	<i>recruit or hire staff/volunteers that have <a href="#">relevant training or experience</a></i>				
c.	<i>utilize spaces that are inviting and <a href="#">accessible</a> to target participants</i>				
d.	<i>make sure there are enough people, money, and supplies for programs, events, etc.</i>				
e.	<i>make sure there is <a href="#">marketing and promotion</a> for the program, service or event</i>				
<b>Policies and Procedures</b>					
6.	The group approves and reviews written <a href="#">program, service and event policies and procedures</a> . (See "Recommended Policies and Procedures" section for examples.)				
<b>Total Score for Programs, Services and Events:</b>					

Let's get started (10 - 15)

Making progress (16 - 20)

Good job (21 - 25)

Excellent (26 - 30)

Spaces / Facility	Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Budgeting and Planning</b>				
1. The group reviews and approves a yearly capital budget which includes <a href="#">lifecycle</a> items, <a href="#">capital projects</a> , facility operations and maintenance.				
2. The group takes into account the needs of the community and people when proposing renovations or changes to spaces or the facility.				
3. The group reviews a <a href="#">lifecycle assessment</a> at least once a year.				
4. The group saves money for fixing or replacing <a href="#">lifecycle items</a> and emergency repairs.				
5. The group reviews and approves rental rates, user agreements, and sublicenses every year.				
6. The group reviews the capital budget and their <a href="#">cash flow</a> at monthly board meetings and at the end of a renovation, lifecycle or capital construction project.				
7. The group Identifies one person or outsourced company to manage facility issues, inspections and maintenance including:				
a. <i>use of a log book and maintenance schedule for all equipment such as heating, ventilation, air conditioning, fire suppression system, etc.</i>				
b. <i>use of an inspection and cleaning schedule for all spaces (i.e. Public, offices, etc.)</i>				
c. <i>use of a schedule for all required inspections such as fire extinguishers, elevators, occupancy loads, food preparation areas, back flow testing, lock box testing</i>				
d. <i>following warranty requirements for all key equipment in the space/facility</i>				
<b>Policies and Procedures</b>				
8. The group approves and reviews written <a href="#">space and facility policies and procedures</a> . (See "Recommended Policies and Procedures" section for examples.)				
<b>Total Score for Spaces / Facilities</b>				

Let's get started (11 - 16)

Making progress (17 - 22)

Good job (23 - 28)

Excellent (29 - 33)

Name of Group:

Date:

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Human Resources		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>The Board of Directors</b>					
1.	The group has written, approved position descriptions for all board positions, key volunteers and paid staff outlining tasks, skills, etc.				
2.	The group reviews and approves a yearly <a href="#">succession plan</a> for board members, key volunteers and paid staff.				
3.	The group has a designated person or committee responsible for overseeing the <a href="#">human resources</a> for the organization.				
<b>Policies and Procedures - <a href="#">Volunteers Management</a></b>					
4.	The group approves and reviews written <a href="#">volunteer management policies and procedures</a> . (See “Recommended Policies and Procedures” section for more examples.)				
<b>Policies and Procedures – <a href="#">Staff</a></b>					
5.	The group makes sure that staff has the right resources to do their jobs well (i.e. money, equipment, computers, policies, direction, etc.).				
6.	The group approves and reviews written <a href="#">staff management policies and procedures</a> to maintain <a href="#">compliance</a> with legal requirements including: (See “Recommended Policies and Procedures” section for more examples.)				
a.	<a href="#">non-discrimination</a> , harassment and bullying policies that align with the Alberta Human Rights Act				
b.	staff <a href="#">grievances</a> and <a href="#">termination</a>				
c.	record keeping and payroll				
d.	workplace safety including working alone				
<b>Total Score for Human Resources</b>					

Let's get started (9 - 13)
  Making progress (14 – 18)
  Good job (19 - 23)
  Excellent (24 – 27)



Public Relations		Just Beginning (1)	Working On It (2)	Done (3)	Comments
<b>Involvement</b>					
1.	The group participates and seeks out opportunities that support and promote their organization's benefits, programs and services.				
2.	The group has a written plan or goal to maintain or increase participation and involvement in their organization (volunteers, memberships, program attendees, etc.).				
3.	The group is committed to being welcoming and <a href="#">inclusive</a> at all levels (board, staff, members, programs, events, etc.).				
4.	The group shares their successes and challenges with their members, community and stakeholders.				
<b>Policies and Procedures</b>					
5.	The group approves and reviews written <a href="#">public relations policies and procedures</a> . (See "Recommended Policies and Procedures" section for more examples.)				
<b>Marketing and Membership</b>					
6.	The group reviews and approves a written <a href="#">Marketing Plan</a> that supports their strategic and business plan goals and actions. (See "Glossary" for recommended sections to include in marketing plan.)				
7.	The group's uses of marketing materials are informative, easy to read and well distributed.				
8.	The group uses different kinds of marketing materials that are easy to read and designed to reach specific groups of people.				
<b>Communications</b>					
9.	The group reviews and approves a written <a href="#">Communication Plan</a> that targets different people. (See "Glossary" for recommended sections to include in marketing plan.)				
<b>Total Score for Public Relations</b>					

Let's get started (9 - 13)
  Making progress (14 - 18)
  Good job (19 - 23)
  Excellent (24 - 27)

Name of Group:

Date:

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How are you doing?

Total Score for Overall

- 1. **Let’s Get Started (97 - 145):** There are many opportunities for healthy practices that your organization can implement to improve your organization’s overall health. Your City liaison has experience, resources and contacts to help organizations improve their practices.
- 2. **Making Progress (146 - 194):** Your organization has started to implement healthy practices but there are more than half of the recommended practices for you to consider to improve your organization’s overall health. Your City liaison has experience, resources and contacts to help organizations improve their practices.
- 3. **Good Job (195 - 243):** Your organization has implemented more than half of the recommended healthy practices and is addressing common issues facing non-profit organizations. Your City liaison has experience, resources and contacts to help organizations improve their practices, consider contacting your Liaison for assistance in these areas.
- 4. **Excellent (244 - 291):** You are implementing many healthy practices and should focus on maintaining this level by continually reviewing existing policies and procedures, making changes as necessary and adding new ones as needed.

*Please share a copy of this completed form with your City Liaison for their information and records.*

## Scoring Template

Different people in your organization may have different perspectives about its health. It can be helpful to have a few different people complete the assessment. This template will help you to average the scores provided by the different people. Some questions to ask before averaging the scores: (1) Were some people more knowledgeable about different aspects of the organization's health? If yes, think about limiting the responses to those who are most informed about those aspects. (2) Were there differences in how people rated different aspects of the organization's health? If there were considerable differences, it may be helpful to discuss as a group your different perspectives of these aspects. Add the name for each person who completed the self-assessment under the **Name** column. Then transfer that person's scores for each domain (e.g. **Strategic Direction, Board Governance**) under the relevant column. Enter the number of people that completed that domain under the **Divided by the Number of People** row. The score ranges for each domain and the overall score are available on the next page for reference.

Name		Strategic Direction Score	Board Governance Score	Finances & Funding Score	Programs, Services & Events Score	Spaces / Facility Score	Human Resources Score	Public Relations Score	Overall Score
First Person									
Second Person									
Third Person									
Fourth Person									
Fifth Person									
Sixth Person									
Seventh Person									
Eighth Person									
Ninth Person									
Tenth Person									
Totals									
Divided by the Number of People		/	/	/	/	/	/	/	/
Average Score									

	Strategic Direction Score Range	Board Governance Score Range	Finances & Funding Score Range	Programs, Services & Events Score Range	Spaces / Facility Score Range	Human Resources Score Range	Public Relations Score Range	Overall Score Range
Let's Get Started	12 - 18	21 - 31	25 - 37	10 - 15	11 - 16	9 - 13	9 - 13	97 - 145
Making Progress	19 - 24	32 - 42	38 - 50	16 - 20	17 - 22	14 - 18	14 - 18	146 - 194
Good Job	25 - 30	43 - 53	51 - 63	21 - 25	23 - 28	19 - 23	19 - 23	195 - 243
Excellent	31 - 36	54 - 63	64 - 75	26 - 30	29 - 33	24 - 27	24 - 27	244 - 291

## Recommended Policies and Procedures

1. **Governance Policies and Procedures** – an officially accepted set of ideas or rules about the way that an organization is controlled by the people who run it

Policies and procedures recommended to begin with:

- a. A [policy](#) on policy making
- b. Board of directors [orientation](#) and training
- c. Board member [remuneration](#) and [reimbursement](#)
- d. Board member self-evaluation and performance
- e. [Business continuity](#)
- f. Collecting, updating, storing and protecting records (printed and electronic) including the organization's corporate seal
- g. Using personal information and member email lists
- h. Membership (who can be a member, benefits of members, cost of memberships, etc.)
- i. Electronic communication, file sharing and votes by board members
- j. Reporting [requirements](#) from staff, key volunteers and committees
- k. Board position term limits (i.e. maximum of two years per term for board members, terms for key board positions do not all end in the same year, etc.)
- l. Limit on how many years total one person can be on the Board of Directors
- m. [Terms of Reference](#) for all committees, including Executive Committee (if applicable)
- n. Police clearance checks for volunteers and staff who are dealing with money and vulnerable people (i.e. children, seniors, etc.)

2. **Financial Policies and Procedures** – an officially accepted set of ideas or rules about the way that an organization manages and controls its money

Policies and procedures recommended to begin with:

- a. [Investments](#) and savings
- b. Number of signatures on cheques
- c. Coverage for Treasurer when absent
- d. Collecting of money owed to the organization

3. **Program, Service and Event Policies and Procedures** - an officially accepted set of ideas or rules about the way that an organization is controlled by the people who run it

Policies and procedures recommended to begin with:

- a. Written partnership agreements or contracts
- b. [Pricing guidelines](#) for programs, services or events

4. **Space and Facility Policies and Procedures** – an officially accepted set of ideas or rules about the way that an organization manages their space or facility

Policies and procedures recommended to begin with:

- a. Rentals and user groups
- b. Damage deposits
- c. Insurance coverage by organization and sublease holders
- d. Insurance coverage by renters and user groups
- e. Liquor licensing and service
- f. [Pricing guidelines](#) for rentals and subleases
- g. Appropriate safety measures for public safety (i.e. ice on sidewalks, used needles, wet floors, etc.)
- h. [Emergency response plan](#) for buildings, grounds, records, staff and visitors

5. **Volunteer Management Policies and Procedures** – an officially accepted set of ideas or rules about the way that an organization takes care of and makes decisions about the selection, supervision and involvement of volunteers in an organization

Policies and procedures recommended to begin with:

- a. Volunteer supervision and support
- b. Volunteer [orientation](#)
- c. Volunteer applications and screening
- d. Volunteer [recruitment](#)
- e. Volunteer [dismissal](#)
- f. Volunteer recognition
- g. Volunteer [remuneration](#) and [reimbursement](#)
- h. Volunteer [code of conduct](#), [confidentiality](#) and [conflict of interest](#) agreements
- i. [Harassment](#) and [bullying](#)

6. **Staff Management Policies and Procedures** - Approves and reviews written policies and procedures, updating as required, to maintain compliance with legal requirements including:

- a. Staff hiring practices
- b. Staff on-boarding and [orientation](#)
- c. Staff supervision and performance management
- d. Staff benefits and professional development
- e. Staff [compensation](#) and [reimbursement](#)
- f. Staff [code of conduct](#), [confidentiality](#) and [conflict of interest](#) agreements

- 7. Public Relations Policies and Procedures** - Approves and reviews written policies and procedures, updating as required, to maintain compliance with legal requirements including:
- a. Using or sharing of photos, contact information, stories, etc. (i.e. waivers)
  - b. Interacting with the media (who, how, when, why, job descriptions, etc.)
  - c. Receiving, reviewing and responding to ideas, issues, suggestions and perceptions from individuals, community groups, and the general public)

## Glossary - What does this word mean?

1. **Accessible** – able to be reached, used or easily understood
2. **Action Plan** – a set of tasks or activities that a person or group plans to do
3. **Alberta Human Rights Act** - the Alberta Human Rights Act applies to provincially regulated employers and service providers. The Act prohibits discrimination on the basis of age, ancestry, colour, family status, gender, marital status, race, religion, sexual orientation and many other factors.  
<http://www.qp.alberta.ca/documents/Acts/A25P5.pdf>
4. **Audit** - a complete and careful examination of the financial records of a business or person which may be completed by a professional accountant or by two members of the organization
5. **Authorized Cheque Signers** – a person who has legal permission to sign cheques for the organization and has information on file with the bank
6. **Barriers** – a place, problem or thing that makes something difficult
7. **Bookkeeping** - a person or computer program whose job is to keep the financial records for a business
8. **Bullying** – to frighten, hurt or threaten someone
9. **Budget** - a plan used to decide the amount of money that can be spent and how it will be spent
10. **Business Continuity** – to keep the key operations of an organization going even when difficult events or emergencies happen
11. **Business Plan** - outlines the organization's priorities for service delivery (programs and services) with an associated budget for the following year; be responsive to the community's needs and reflective of the organization's financial capabilities; meets the mandate of the organization written in its bylaws
12. **Bylaws** - a set of rule that an organization makes and that its members must follow
13. **Capacity** - the ability to do something (i.e. volunteers, money, time)
14. **Capital Project** – a project that needs a large amount of money to do (i.e. building something)
15. **Cash Flow** - incomings and outgoings of cash or money, representing the operating activities of an organization
16. **Code of Conduct** – written description of acceptable behaviours in an organization that a person agrees to follow

17. **Communication Plan** – A plan to provide information and understanding needed for a certain group of people to think, know, believe or do something differently.

Recommended sections to include in a communication plan are:

- a. Who are you try to communicate with specifically (audience)?
- b. What do you want your audience to know, think, believe or do differently?
- c. What is the key information your audience needs to know?
- d. How are going to share this information with your audiences? (Newsletters, mail drops, social media, website, poster blitz, mailing list etc.)
- e. Recognition of donors who give money or in-kind contributions

18. **Compensation** - payment given for doing a job

19. **Compliance** – an action that must be completed as it is a rule, law, etc.

20. **Confidentiality** – a formal document that a person signs agreeing to keep information private and not share with people outside of the organization

21. **Conflict of Interest** - a problem caused by having official responsibilities that involve things that might be helpful or harmful to you

22. **Delegated** - to give a job, duty, decision, activity to someone

23. **Director and Officer Liability Insurance** - insurance that provides general cover to an organization’s board members to reduce personal legal responsibility

24. **Dismissal** – to end the employment or job of a person

25. **Distribution** – to give or deliver something to people

26. **Diversity** - having many different forms, types, ideas and people (i.e. age, race, religion, income, etc.)

27. **Emergency Response Plan** – a set of tasks or activities that a person or group plans to do to when something (such as a flood, tornado, fire, plane crash, etc.) happens suddenly and causes suffering or loss to the organization, building or people

28. **Expenses** - the amount of money that is needed to pay for or buy something

29. **Evaluation** - to judge the value or condition of (someone or something) in a careful and thoughtful way
30. **Financial and Legal Oversight** - the act or job of directing work that is being done relating to money or the law
31. **Financial Reports** - official document that gives information about the money in an organization
32. **Funding Strategies** - a careful plan or method for raising money, usually over a long period of time
33. **Generally Accepted Accounting Practices** – rules and guidelines for judging and comparing financial information or data and how it is reported or shared
34. **Governance** - the way that an organization is controlled by the people who run it
35. **Grievances** - a feeling of having been treated unfairly
36. **Harassment** – to attack, bother or annoy a person repeatedly
37. **Human Resources** - a group of people who are able to do work
38. **Implementation** - to begin to do or use (something, such as a plan)
39. **Inclusive** - open to everyone, not limited to certain people
40. **Informative** – provide information
41. **In-kind Contributions** - made up of something other than money
42. **Investments** - the act of using money to earn more money
43. **Lifecycle** - the series of stages through which something passes from the beginning of its life until the end
44. **Lifecycle Assessment** – a plan that describes what stages pieces of a building or structure are at in their life, when it will reach the end of its life and the amount of money that will be needed to replace that piece
45. **Lifecycle Items** – individual pieces or parts of a building or structure (i.e. roofing, heating, ventilation, air conditioning, carpets, parking lots, etc.)
46. **Management** - the act or process of controlling and dealing with something

47. **Marketing and Promotion** - activities that increase people's awareness of an organization's programs, products and services (i.e. advertising) and making sure that the products, programs or services can be purchased (i.e. membership, program, etc.)

48. **Marketing Plan** – a set of tasks or activities that make people aware of a company's products, programs or services

Recommended sections to include in a marketing plan are:

- a. Promoting programs, services, events, opportunities and membership benefits
- b. Using social media, website and electronic mailing lists
- c. Providing enough money to support marketing activities
- d. Tracking and analyzing information such as ages, addresses, etc. on participants, volunteers and members to identify possible gaps in marketing activities

49. **Measurable Goals** – something that you are trying to do or achieve that is large enough to be noticed

50. **Mission Statement** – a description of the organizations purpose; why the organization exists

51. **Non-discrimination** – everyone is treated fairly and given the same access to jobs, programs and events

52. **One Voice** – after a vote or in speaking to others, all people on the board of directors work to make a decision happen, even if a person did not agree at the time of voting

53. **Operating** – how a business, building, program, etc. is run or controlled

54. **Orientation** – the process of giving a person training or information about a new position, organization, job, etc.

55. **Policy** – an officially accepted set of ideas or rules about what should be done

56. **Pricing Guidelines** – instructions or rules that tell the amount of money that should be paid for something (i.e. room rental)

57. **Procedure** – an accepted set of actions that are done in order

58. **Professional Third Party Service** – a business or company that is not involved with the organization and provides something that is needed

59. **Projected** – a planned piece of work that has a specific purpose and usually requires a lot of time

60. **Realistic Priorities** – something that is more important than other things and is dealt with in a practical way that is able to be finished
61. **Reconcile** – to find a way to make two sets of information the same or match
62. **Recruitment Plan** - a set of tasks or activities that a person or group plans to do to find suitable people to join the organization
63. **Reflective** – used to say that one thing shows what something else is like
64. **Reimbursement** – to pay someone an amount of money equal to the amount they spent
65. **Relevant Training or Experience** – work, volunteer, school or classes that give a person related skills and knowledge to do a job or task
66. **Remuneration** - the amount of money paid to a person for work they have done
67. **Responsive** – reacting in a desired or positive way
68. **Requirements** – something that is needed or must be done
69. **Revenue** – the money that is made by or paid to an organization, company or business
70. **Risk** – the possibility or chance something bad or unpleasant will happen
71. **Scope** – work to be done under a contract to finish a project usually with tasks or activities and a schedule
72. **Staff** – a group of people who work for an organization
73. **Stakeholder** – a person who has an interest or investment in something (i.e. organization)
74. **Strategic Plan** - a set of actions that a person or group plans to do to achieve a goal or to create a desired future
75. **Succession Plan** - a set of tasks or activities that a person or group plans to do to replace people and staff leaving the organization
76. **Termination** – making someone leave a job; being fired
77. **Terms of Reference** – a formal document that describes the purpose, goals, people, etc. of a committee, program or project
78. **Urgent Matters** – something important that needs to be done or dealt with right away
79. **Vision Statement** - description of the organizations ideal future; what the organization would like to achieve in the future

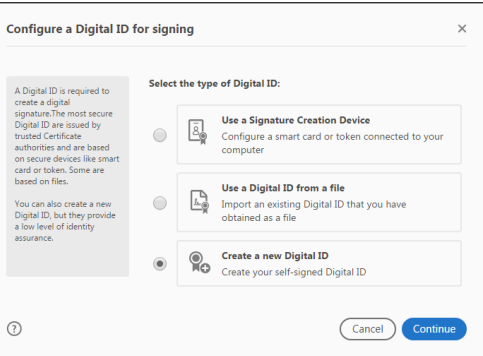
- 80. **Values Statement** – a description used to inform staff and customers of the organizations beliefs and priorities
- 81. **Volunteer Management** – to take care of and make decisions about the selection, supervision and involvement of volunteers in an organization
- 82. **Workplace Safety** – activities, procedures and policies that meet government standards and make sure people in a workplace are safe and healthy  
<http://work.alberta.ca/occupational-health-safety.html>

*Reference: Information for these definitions was collected from [www.learnersdictionary.com](http://www.learnersdictionary.com) and [www.businessdictionary.com](http://www.businessdictionary.com).*

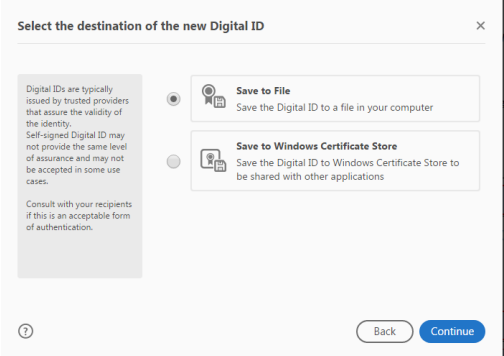
# Digital Signature Instructions

Please follow these instructions to add your digital signature to the self-assessment.

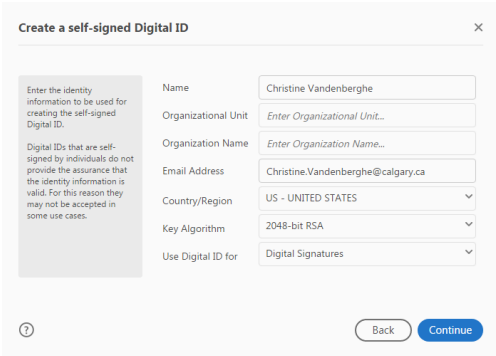
1. Select “Create a new Digital ID” and click on “Continue”.



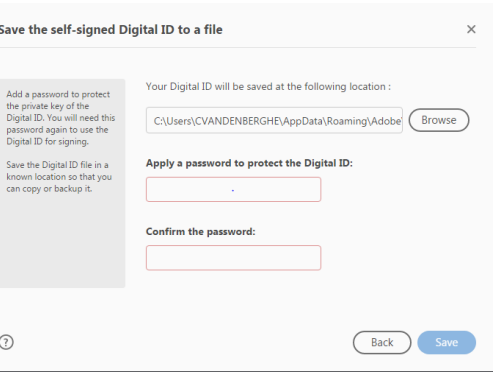
2. Select “Save to File” and click on “Continue”.



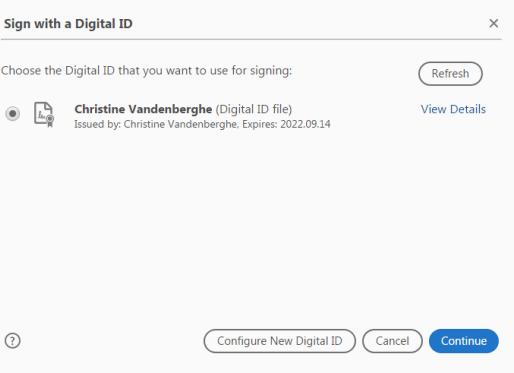
3. Enter your name, organization, and email information and click on “Continue”.



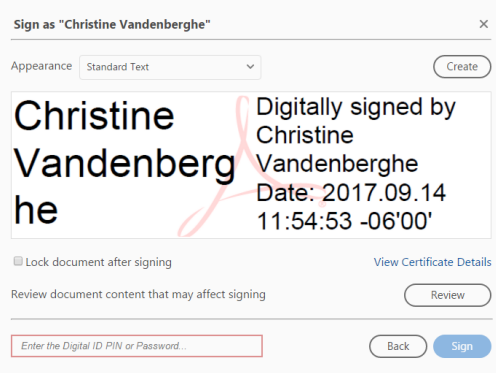
4. Add a password and confirm your password, then click on “Save”.



5. Select your Digital ID and click on “Continue”.



6. Select “Sign”.





This tool was developed by the Department of Calgary Neighbourhoods, Neighbourhood Connections Division in collaboration with The Federation of Calgary Communities, Propellus, Alberta Culture and a number of representatives from local not-for-profit organizations in Calgary.