

Nonprofit Organizational Capacity & Fiscal Sponsorship Self-Assessment

Please assess your organization's current status in each area below by selecting the response that best reflects your situation.

Section 1: Legal & Financial Infrastructure

Note: Place a mark in the appropriate cell for each of the five areas of capacity. If you see a cell that is darkened that indicates the response is not appropriate for that specific area of capacity.

Item	Organizational Capacity	Not in Place	Developing	In place but limited	Mostly in place	Fully established
	Rating of Capacity →	(1)	(2)	(3)	(4)	(5)
1.1	We have 501(c)(3) status and are in good standing with the IRS.					
1.2	We maintain accurate and timely financial records (e.g., QuickBooks).					
1.3	We have systems for budgeting, financial reporting, and audits.					
1.4	We manage contracts, grants, and compliance requirements effectively.					
1.5	We have the capacity to manage payroll, taxes, and insurance.					
	Subtotals					

Add up your marks each column and multiply by the number in parentheses at the top of the column. Then add together your column totals and place the sum in the total box below.

Total	/25
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Section 2: Governance & Leadership

Note: Place a mark in the appropriate cell for each of the five areas of capacity. If you see a cell that is darkened that indicates the response is not appropriate for that specific area of capacity.

Item	Organizational Capacity	Not in Place	Developing	In place but limited	Mostly in place	Fully established
	Rating of Capacity →	(1)	(2)	(3)	(4)	(5)
2.1	We have an active, engaged, and legally compliant board of directors.					
2.2	Our leadership has experience managing nonprofit operations.					
2.3	We have a clear organizational mission and vision.					
2.4	Our decision-making processes are structured and effective.					
2.5	We conduct regular board meetings and strategic planning sessions.					
	Subtotals					

Add up your marks each column and multiply by the number in parentheses at the top of the column. Then add together your column totals and place the sum in the total box below.

Total	/25
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Section 3: Program & Operational Capacity

Note: Place a mark in the appropriate cell for each of the five areas of capacity. If you see a cell that is darkened that indicates the response is not appropriate for that specific area of capacity.

Item	Organizational Capacity	Not in Place	Developing	In place but limited	Mostly in place	Fully established
	Rating of Capacity →	(1)	(2)	(3)	(4)	(5)
3.1	We run programs that are aligned with our mission and have measurable impact.					
3.2	We have staff or volunteers to manage daily operations.					
3.3	We have reliable systems for tracking program data and outcomes.					
3.4	We can meet grant deliverables and reporting deadlines.					
3.5	We have operational policies and procedures in place.					
	Subtotals					

Add up your marks each column and multiply by the number in parentheses at the top of the column. Then add together your column totals and place the sum in the total box below.

Total	/25
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Section 4: Fundraising & Sustainability

Note: Place a mark in the appropriate cell for each of the five areas of capacity. If you see a cell that is darkened that indicates the response is not appropriate for that specific area of capacity.

Item	Organizational Capacity	Not in Place	Developing	In place but limited	Mostly in place	Fully established
	Rating of Capacity →	(1)	(2)	(3)	(4)	(5)
4.1	We have a fundraising plan and the capacity to implement it.					
4.2	We have access to diverse funding streams (grants, donations, earned revenue, events).					
4.3	We are eligible for and able to apply for grants independently.					
4.4	Donors and funders trust our ability to steward funds responsibly.					
4.5	We have the back-office capacity to manage restricted funds.					
	Subtotals					

Add up your marks each column and multiply by the number in parentheses at the top of the column. Then add together your column totals and place the sum in the total box below.

Total	/25
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Section 5: Strategic Readiness for Fiscal Sponsorship

Note: **The response scale has changed! Note the change in blue highlight.** Place a mark in the appropriate cell for each of the five areas of readiness. If you see a cell that is darkened that indicates the response is not appropriate for that specific area of capacity.

Item	Organizational Capacity	Strongly Agree	Agree	Unsure	Disagree	Strongly Disagree
	Rating of Capacity →	(1)	(2)	(3)	(4)	(5)
5.1	We are a new, grassroots, or emerging initiative.					
5.2	We need time to build infrastructure before pursuing 501(c)(3) status.					
5.3	We need help managing back-office tasks (HR, finance, legal, compliance).					
5.4	We want to focus on mission/programs without being bogged down in administrative functions.					
5.5	We are seeking short- or long-term back office support to grow sustainably.					
	Subtotals					

Add up your marks each column and multiply by the number in parentheses at the top of the column. Then add together your column totals and place the sum in the total box below.

Total	/25
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Nonprofit Organizational Capacity & Fiscal Sponsorship Self-Assessment Scoring Companion

Here's a **Companion Scoring Worksheet** designed to go alongside your self-assessment form. It allows you to total your scores by section and reflect on the results.

Instructions:

As you complete the Nonprofit Organizational Capacity & Fiscal Sponsorship Self-Assessment, transfer your score (1 to 5) for each question to the grids below. Then total each section and interpret your results using the guide on the last page of this companion.

Section 1: Legal & Financial Infrastructure

Question	Score (1–5)
1.1 IRS and 501(c)(3) status	___
1.2 Financial records management	___
1.3 Budgeting & reporting systems	___
1.4 Grant/contract compliance	___
1.5 Payroll and tax infrastructure	___
Total for Section 1 (Max 25):	___

Section 2: Governance & Leadership

Question	Score (1–5)
2.1 Active and compliant board	___
2.2 Leadership and operations experience	___
2.3 Mission and vision clarity	___
2.4 Decision-making processes	___
2.5 Board meetings and planning	___
Total for Section 2 (Max 25):	___

Section 3: Program & Operational Capacity

Question	Score (1–5)
3.1 Program alignment & impact	___
3.2 Staff or volunteer capacity	___
3.3 Data and outcome tracking	___
3.4 Grant deliverables compliance	___
3.5 Operational procedures	___
Total for Section 3 (Max 25):	___

Section 4: Fundraising & Sustainability

Question	Score (1–5)
4.1 Fundraising plan	___
4.2 Diverse revenue streams	___
4.3 Grant eligibility & readiness	___
4.4 Funder trust and stewardship	___
4.5 Managing restricted funds	___
Total for Section 4 (Max 25):	___

Section 5: Fiscal Sponsorship Readiness

Question	Score (1–5)
5.1 Emerging or grassroots initiative	___
5.2 Building infrastructure	___
5.3 Need for back-office support	___
5.4 Focus on mission/program delivery	___
5.5 Seeking structured growth support	___
Total for Section 5 (Max 25):	___

Overall Assessment Score

Grand Total (Max 125): ___

See the Next Page for Interpretation Guide

Interpretation Guide

Assessment of Your Need for Fiscal Sponsorship

If any of the three results below are present it is recommended that you seek the services of a fiscal sponsor:

- If your total for Section 5: Fiscal Sponsorship Readiness is **15 or less** you likely need a fiscal sponsor.

OR

- If your responses in Section 5 include **at least two or more with a “1” or “2”** its highly recommended you secure the services of a fiscal sponsor.

OR

- If any of the following items are marked as a “1” or “2” a fiscal sponsor is highly recommended: Items 1.1, 1.2, 1.3, 1.4, 1.5 and 5.1, 5.2, 5.3, 5.4, 5.5

Assessment of Organizational Capacity

Based on your Grand Total score (max 125) locate the interpretation of your organizational capacity:

- **100–125: Strong Capacity** – You likely have the infrastructure to operate your organization independently.
- **70–99: Moderate Capacity** – You may benefit from additional supports for your organization. Fiscal sponsorship could help build internal systems while focusing on your mission.
- **Below 70: Early Stage** – Organizational capacity is missing in some of the most important areas of operation and/or governance. Fiscal sponsorship is highly recommended as you build the foundation of your organization.