

The Nonprofit Financial Structure Self-Assessment

A 10-question gut-check for where your organization's finances actually stand — before your next board meeting asks.

How to use this: Answer honestly, not aspirationally. For each question, score where your organization actually operates today — not where you hope to be by year-end. Add up your total at the bottom of each section, then check your score against the key on the last page.

1
Rarely / Never

2
Sometimes

3
Usually

4
Consistently

1 Budget Structure

We have a written annual budget that actually guides monthly decisions — not one that gets approved and filed away.

1	2	3	4
☐	☐	☐	☐

We compare actual spending to budget on a regular schedule, not just when something feels off.

1	2	3	4
☐	☐	☐	☐

2 Board Reporting

Our treasurer or ED could produce an accurate financial snapshot within 24 hours of being asked.

1	2	3	4
☐	☐	☐	☐

Board members leave financial reviews with clarity, not more questions than they came in with.

1	2	3	4
☐	☐	☐	☐

3 Vendor & Spend Tracking

Vendor spending is tracked in one consistent place, not scattered across inboxes and personal notes.

1	2	3	4
☐	☐	☐	☐

There's a clear approval step before money goes out — someone signs off before someone spends.

1	2	3	4
☐	☐	☐	☐

4 Financial Roles & SOPs

If our treasurer or bookkeeper left tomorrow, someone else could pick up the financial process without starting from scratch.

1	2	3	4
☐	☐	☐	☐

Our recurring financial tasks (invoicing, reconciliation, reporting) follow a written process, not tribal knowledge.

1	2	3	4
☐	☐	☐	☐

5 Cash Flow & Reserves

We know, right now, how many months of operating expenses we have in reserve.

1	2	3	4

We can see cash flow gaps coming before they become a crisis, not after.

1	2	3	4

YOUR TOTAL SCORE: / 40

What Your Score Means

10–17 — Reactive Zone

Money decisions are being made in the moment, not from a system. This isn't a judgment — it's the most common starting point for growing nonprofits. The good news: structure can be built faster than you'd think.

18–27 — Building Structure

Some pieces are in place, but they're not yet connected into a system your whole board and staff can rely on. This is exactly the gap RootWork's framework is built to close.

28–34 — Mostly Structured

You have real foundations. The opportunity now is tightening board reporting and documentation so the structure survives a staff or board transition.

35–40 — Board-Ready

Your organization has strong financial structure already. RootWork can help formalize and scale it as you grow.

Wherever you scored, there's a clear next step.

RootWork for Nonprofits builds the framework, templates, and reporting tools behind every score band above.

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