

The Nonprofit Operations Health Check

Score your organization across 10 operational areas in under 10 minutes.

Bradley Wendling · Founder, Wendling Nonprofit Consulting · wendlingconsulting.com

Rate your organization honestly in each area below using a **1–5 scale**. Be candid — this tool is most valuable when it reflects reality, not aspiration. Add your scores at the bottom to find your Operations Health Score and see what it means for your organization.

THE ASSESSMENT

Operational Area	1	2	3	4	5	Your Score
Program Design & Scaling Programs are documented, replicable, and built to scale without breaking. <i>1 = No documentation or replication plan · 5 = Fully documented, scaling-ready</i>	■	■	■	■	■	_____
Multi-Site Coordination You have systems in place to manage multiple locations consistently. <i>1 = Each site operates independently · 5 = Standardized coordination across all sites</i>	■	■	■	■	■	_____
SOP Documentation Standard operating procedures exist for your core functions and are actually used. <i>1 = Little to no SOPs exist · 5 = Complete SOPs, reviewed and trained annually</i>	■	■	■	■	■	_____
Staff Capacity & Retention Your team has the capacity to execute without burning out. <i>1 = Chronic understaffing, high turnover · 5 = Right-sized team, low turnover</i>	■	■	■	■	■	_____
Regulatory & Compliance Your organization meets all federal, state, and funder compliance requirements. <i>1 = Significant gaps or findings · 5 = Fully current, audit-ready at all times</i>	■	■	■	■	■	_____
Financial Controls Budget-to-actual reporting, restricted fund tracking, and financial oversight are in place. <i>1 = Minimal controls or oversight · 5 = Strong controls, regular board reporting</i>	■	■	■	■	■	_____
Technology & Data Systems You use a CRM or database to manage program data, outcomes, and partner relationships. <i>1 = Spreadsheets only or no system · 5 = CRM fully implemented with live dashboards</i>	■	■	■	■	■	_____
Partner Network Management You have active relationships with community partners, funders, and vendors. <i>1 = Relationships are informal/reactive · 5 = Structured network with formal agreements</i>	■	■	■	■	■	_____
Disaster Preparedness A tested emergency operations plan exists for service continuity during a crisis. <i>1 = No plan exists · 5 = Written plan, tested annually, staff trained</i>	■	■	■	■	■	_____
Board Engagement & Reporting Your board receives regular, meaningful operational and financial reporting. <i>1 = Minimal or irregular reporting · 5 = Monthly dashboard, fully engaged board</i>	■	■	■	■	■	_____
TOTAL SCORE						_____ / 50

WHAT YOUR SCORE MEANS

40–50 Strong Foundation	Your operations are in good shape. The opportunity now is to optimize, sustain, and ensure your systems scale with your growth.
27–39 Growing Pains	You have real strengths but meaningful gaps that could limit your growth or create compliance exposure. A targeted operations partner could accelerate your impact.
14–26 Operational Risk	Your mission is outpacing your infrastructure. Without intentional investment in your systems, the gaps will widen. This is the time to act, not wait.
10–13 Crisis Mode	Your organization is at significant operational and compliance risk. An experienced operations leader needs to be embedded quickly.

Ready to close the gaps?

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