

# Bearing Tree

## Organizational Capacity Self-Assessment

Growth is exciting, but it also puts pressure on the systems supporting your organization behind the scenes. Mid-year is a valuable opportunity to pause and evaluate whether your finance, payroll, and development operations are providing the visibility, consistency, and support your organizational needs now and in the future.

To help guide that reflection, we've created a brief Organizational Capacity Self-Assessment designed to help nonprofit leaders identify strengths, gaps, and opportunities for improvement across key operational areas.

### Self-Assessment

Rate each statement from 1 (*Strongly Disagree*) to 5 (*Strongly Agree*).

Then total each section and your overall score.



#### Finance & Accounting

- Our financial processes run consistently without requiring significant oversight \_\_\_\_\_
- We receive timely, accurate financial information that supports leadership and board decisions \_\_\_\_\_
- We have clear visibility into balances and funding mix \_\_\_\_\_
- Our financial information helps us understand the past and plan ahead \_\_\_\_\_
- The time, cost, and effort required to manage finance feels appropriate and gives leadership confidence \_\_\_\_\_

Score (5–25):



#### Payroll & Benefits

- Payroll is accurate, timely, and handled with confidence from a compliance perspective \_\_\_\_\_
- Benefits administration runs smoothly and is well understood by employees \_\_\_\_\_
- Employee questions or issues are resolved quickly without escalating to leadership \_\_\_\_\_
- This area runs with minimal time commitment from leadership \_\_\_\_\_
- The cost and administrative burden are reasonable and provide peace of mind \_\_\_\_\_

Score (5–25):

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### Development Operations & Donor Insight

- We have clear visibility into our fundraising pipeline and performance \_\_\_\_\_
- We can reasonably forecast fundraising revenue over the next 6–12 months \_\_\_\_\_
- Our donor data and research are accurate, organized, and easy for our team to use to build stronger donor relationships \_\_\_\_\_
- Development operations support fundraising without creating administrative burden \_\_\_\_\_
- The time and resources invested in fundraising operations produce strong results and confidence \_\_\_\_\_

Score (5–25):

Overall Score (15–75):

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### How to Interpret Your Results

#### 63–75 | STRONG & SCALABLE

*You likely have strong systems and leadership visibility across key areas. Most things run as expected, allowing focus on mission and growth. Next step is scaling without adding complexity.*

#### 51–62 | STABLE WITH GAPS

*You have a solid foundation, but some areas require more time or attention than they should. Growth may be starting to strain your current structure.*

#### 39–50 | STRAINED

*Operations may be creating friction. Leadership may be spending more time managing details with inconsistent visibility or confidence.*

#### Below 39 | AT RISK

*There are likely gaps impacting clarity and peace of mind. Leadership may be pulled into operational issues regularly.*

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### Where to Focus



#### *Finance & Stewardship*

Lower scores often indicate limited financial visibility, inconsistent processes, or too much leadership time spent gathering information and resolving issues. Higher scores typically mean things are working but may still require more attention than expected as complexity grows.

Without clear, timely, and forward-looking financial insight, decision-making slows, and risk increases.

Focus on:

- Clear, usable reporting
- Consistent processes and close cycles
- Access to the right level of financial expertise

#### *Why organizations consider outsourcing:*

Building this level of capability internally can be costly and difficult to sustain. A structured, team-based approach often improves visibility, consistency, and forward planning while reducing leadership burden. It also provides redundancy and continuity during periods of change.

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#### *Payroll & Benefits*

Lower scores often reflect administrative burden, compliance concerns, or recurring issues that require leadership involvement. Even when working well, this area can quietly consume time as organizations grow.

Payroll and benefits directly impact an employee's sense of well-being and carry compliance risks, making consistency and reliability critical.

Focus on:

- Accuracy and compliance confidence
- Reduced manual effort and key-person dependency
- Minimal leadership involvement

#### *Why organizations consider outsourcing:*

Outsourcing can provide structured compliance, stronger systems, and a better employee experience, while significantly reducing administrative effort and risk.

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#### *Development Operations & Donor Insight*

Lower scores typically indicate limited pipeline visibility, inconsistent processes, or underutilized donor data. Higher scores suggest a solid foundation, but often with room to improve consistency and scalability.

Sustainable fundraising depends on more than effort. It requires structure, data, and visibility to support consistent results.

Focus on:

- Pipeline tracking and forecasting
- Donor data quality and usability
- Consistent, supportive processes

#### *Why organizations consider outsourcing:*

These capabilities are often difficult to build and maintain internally. External support can bring structure, insight, and execution capacity, allowing teams to focus more on relationships and growth.



## *Organizational Capacity Self-Assessment*

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### *Overall Takeaway*

Regardless of your scores, the key question is not only how these functions perform, but how much time, cost, and uncertainty it takes to sustain them.

When time to manage increases, costs feel misaligned, or confidence is eroded, it is typically a sign that a more structured and scalable approach to core administrative functions may be worth considering.

Strong missions need strong operational foundations. If this assessment raises questions about scalability, visibility, or leadership capacity, Bearing Tree is here as a partner and resource to help you think through what comes next.

Contact us to learn more: [connect@bearingtree.com](mailto:connect@bearingtree.com)

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